

International Survey Unit (ISU)





Centre of Excellence for Research

The PricewaterhouseCoopers' International Survey Unit (ISU) exists to provide a specialist service, both externally to a range of local and international clients and internally to the core business lines of the PwC global network of offices.

We provide a 'one-stop shop' of questionnaire design, survey implementation and statistical analysis; using staff who are market research experts.

PricewaterhouseCoopers has a unique range of in-house specialists who can provide a seamless service to our clients; with market research playing a key role within a broader multidisciplinary context. We have expert skills and a breadth of experience in all the core areas of market research.

We have no doubt that you will find our research interesting, innovative and

challenging. We seek to provide you with the most effective solutions to your research requirements. You can be assured that we can provide you with a highly skilled and experienced team who will focus on delivering research findings which can ultimately, influence future strategy.

We are confident of our ability to meet all of your research requirements and to provide you with quality results and actionable recommendations.

We take this opportunity to detail the core competencies of the Market Research Unit and to illustrate how we can help clients meet a variety of needs.

- Our services
- The benefits of using the ISU
- Pioneering e-surveys
- Quantitative and Qualitative research experience
- Our team



International Survey Unit - Our Services

Market research services required by our clients involve a broad range of research techniques, which typically fall within the following areas of research:

- Service quality and customer satisfaction studies;
- Usage and attitude studies/opinion polls;
- Organisation reviews;
- Product and advertising testing;
- Retail audits;
- Test marketing/consumer panel;
- E-surveys; and
- Litigation support.

We have expert skills and a breadth of experience in the following core areas of market research:

- Questionnaire and survey design;
- Sampling techniques;
- Quantitative fieldwork - telephone, personal, e-survey, and self-completion interviews;
- Qualitative research - group discussions, depth interviews and mystery shopping exercises;
- Business to business;
- Statistical analysis and interpretation; and
- Advisory role in all elements of market research.

This research capacity spans all continents and all industry/service sectors.



International Survey Unit - Benefits

Use of our market research services can provide the following key benefits:

- Enables you to meet, head on, the challenge of increasing your knowledge of markets and customers as well as identifying opportunities which exist;
- Offers you expert support for work requiring a market research element;
- Allows you the use of e-survey research as an important and growing research methodology;
- Gives you the comfort of knowing that all work is accredited under the Interviewer Quality Control Scheme (IQCS) which sets the research industry's recognised standards for fieldwork;
- Provides to you 'on call' immediately accessible multi-lingual capabilities (a 40 strong team covering all major languages) enabling excellent understanding of the required foreign languages and cultures; and
- Ensures you of confidentiality and seamless service delivery.

In a recent global assignment our client fed back that the decisive factor in the PricewaterhouseCoopers victory over major competitors was the fact that all staff on the assignment were core PricewaterhouseCoopers members and of PricewaterhouseCoopers endorsed quality.

Market Research Unit - Our Team



Our team consists of a team of 38 market research consultants each with their own areas of expertise ranging from statistical analysis and sampling techniques, to sectoral expertise such as financial services and customer satisfaction research. In addition, these consultants are supported by a 100 strong fieldforce of interviewers and a team of 40 multi-lingual executive researchers.

Our telephone research facility includes a state of the art Computer Assisted Telephone Interviewing Suite (CATI), which houses 30 experienced interviewers and is an integral part of our Unit. We feel that our key strengths, which ensure quality, responsive results, which meet your needs, are:

- Specialists in market research with the expertise, in-house to apply to all industry and service sectors;
- Differentiation - our link with the global PwC consultancy practice who understand business issues world-wide;
- Ability to provide an all-embracing service, with no need to out house any elements;
- Our excellent track record of experience in large scale surveys;
- Our experience in e-surveys - one of the big issues in the 21st century; and
- Our being the only consultancy firm in the UK to hold IQCS accreditation, which provides a real comfort factor for clients as well as guaranteeing quality.

The International Survey Unit has the benefit of being part of a large world-wide management consultancy team. Our existing track record with many of the firm's offices world-wide and the trend towards the need for global assignments has meant that we already have established excellent links with the PricewaterhouseCoopers network. For you this means that our ability to meet your research needs has no boundaries and spans all continents.

International Survey Unit - Industry Expertise

As the Centre of Excellence for market research in Europe we have undertaken many dedicated industry studies thereby ensuring that PricewaterhouseCoopers is at the forefront of new developments in the world of business and finance. This expertise ensures that our work is founded upon knowledge of best practice and industry trends. A selection of recent assignments is listed below:

Finance

A study of the impact of the EURO on the retail banking industry involving in-depth interviews with Managing Directors of the top banks in Europe;

A global survey of CEO's, bankers and equity analysts to identify their views on the level of transparency and it's impact on the cost of doing business worldwide. An Opacity Index benchmarks more than 70 countries on an ongoing basis;

A European-wide survey of medium-sized international companies in relation to the extent to which tax implications are considered when undertaking international expansion.

Information Technology

A Pan-European benchmarking study for middle market high tech companies allowing the companies to assess their position within their own market;

A study to assess the market potential for value added services associated with electronic payment technology. Qualitative and quantitative research was used to test web-enabled technology in 3 countries.

Human Resources

Depth interviews with Human Resource Directors of multinational companies to examine their opinions of outsourcing particularly in relation to IT driven HR products;

A study of recruitment methods and best practice in attracting and retaining top performers;

A survey of an American owned public utility to assess employee opinions of company values and determine the level of job satisfaction across a number of plant locations.

Manufacturing

A survey of the opinions of Chief Executives in top European FMCG and Retail companies in relation to the "Efficient Consumer Response" concept; and

Key informant interviews and postal survey with 'blue chip' company chairmen world-wide as part of a global manufacturing project assessing trends in this vital sector up to and beyond the Millennium.

International Survey Unit - Our Experience

Our international experience is wide and varied covering all possible areas with scope for research. Some examples include the following:

Private Sector

A global survey of CEO's to investigate attitudes towards current economic conditions and the latest market developments and challenges facing the management of their organisation.

A market analysis of the telecommunications sector in the US, Germany and the Far East for a leading multinational provider;

A 4 year tracking survey of customer satisfaction with all aspects of service for a major international bank;

A survey of general managers in the Far East, South America, North America and Europe to investigate the progress of a new company wide marketing strategy for one of the electronics giants;

A world-wide study of the corporate credit card market to investigate the costs and benefits associated with the implementation of such a programme in multi-national organisations; and

A census survey conducted across 20 European countries amongst venture capital professionals. The objective of the study is to estimate total investments, divestments and funds raised in the European market and is conducted on an annual basis.

Public Sector

A major study to assess the impact of e-commerce across 29 industry sectors;

A series of service delivery assessment surveys on behalf of a national government. This included building capacity within ministries to enable the survey to be undertaken on a regular basis;

Evaluations of public information campaigns in relation to health issues such as alcohol, drugs, sex education, nutrition and physical activity;

Annual customer satisfaction monitor in relation to public transport services using customer attitudes surveys and independent service assessment;

A study to assess the cost to clients of a government department in complying with government policies;

Investigation of the impact of downsizing for a major public sector organisation and assessment of the retraining requirements for affected employees; and

A study of sport and leisure activities in relation to public participation and the structures required to support and encourage that participation.

International Survey Unit - Qualitative

Our qualitative research team of 6 consultants is led by Julie McClean. Qualitative research is a core component of most of our large-scale projects. It is used to assist with the identification of key issues during the design stages of the project and provides input to questionnaire development and interpretation of results. We also undertake many stand-alone qualitative research projects, a selection of which is provided below.

Finance

Qualitative research was undertaken on behalf of a major stockbroker to discuss specific customer requirements and methods of improving service levels;

A number of qualitative projects have been undertaken to test customer reactions to new developments in banking services delivery channels;

FMCG

Evaluation of advertising for a range of Northern Ireland food and drink manufacturers, including clients in the tea, drinks, bread and meat sectors;

Branding research investigating customer perceptions and brand values on behalf of a number of clients including those in food and drink, and automotive sectors.

Sensitive Issue

An evaluation of the treatment and support service among people with haemophilia on behalf of a multi-national pharmaceutical company;

Focus groups with drug users to examine their behaviours and motivations with regard to illicit drug usage;

Health

A study of the current policies and practices of employers with regard to the health of employees and employer willingness to participate in dedicated programmes; and

Research among the general public to investigate their views and behaviours in relation of a wide range of health issues including alcohol and drugs, sex education, physical activity and nutrition.

International Survey Unit - 'E-Surveys'

As the Internet continues to be the fastest growing medium in history. E-Surveying is increasingly an integral part of our assignments. Used as a single methodology or combined with more traditional methods, it proves a valuable tool in exploring user behaviour and expectations. Our specialist in e-surveys is Amanda Fleming.

Internal Email Surveys

The PricewaterhouseCoopers International Survey Unit has extensive experience in conducting internal PwC email surveys using Lotus Notes, including an assignment that explored business traveller preferences. This was successfully mailed to approximately 18,000 PwC staff in eleven countries, including the UK and USA.

External Email Surveys

Targeted email surveys are most beneficial for customer research, panel research and supplier research when the target population email addresses are known. It has a number of distinct advantages, for example, there is a relatively fast turnaround of results, it is faster to receive than postal methods, the approach is still 'novel' and the data entry phase of the survey process is eliminated. This method is excellent for repetitive studies and can still incorporate personal contact with respondents, though a telephone or email helpline.

Online Surveys

Online Surveys are an ideal method of asking users and visitors of your website, what they think of it. It can provide insight into the user profile and their opinions of your website without geographical barriers. A link can be developed on your website to a PricewaterhouseCoopers International Survey Unit survey hosted on your behalf, offering independence and confidentiality. Online surveys provide companies who are not aware of their user populations' email addresses the opportunity to gain feedback on their product.

Website Usability Testing

'Test Early, Test Often' is the rule of thumb of Website Usability Testing. The PricewaterhouseCoopers International Survey Unit has conducted a multitude of assignments in this area by means of task-related focus groups and depth interviews, including a website evaluation of PricewaterhouseCoopers' re-design of their global website. The research was completed by depth interviews in the UK, Europe and America.

International Survey Unit - Key Contacts



Colin McIlheney is a Director in the ISU, with responsibility for Europe and Asia Pacific. In a research career spanning 20 years Colin has been responsible for the design of over 100 major surveys on a global basis. His particular strengths lie in questionnaire design, sampling and analysis.

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Honor Mallon is Director of UK Research in the International Survey Unit where she has responsibility for managing large scale qualitative and quantitative research projects. Most of her current experience is in the area of customer satisfaction research and new product development. Sectoral experience covers both public and private organisations, in the UK and internationally.

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Julie McClean is a Managing Consultant in the International Survey Unit. Julie's experience lies in three key areas - qualitative research, ad hoc surveys and continuous research. She has responsibility for managing the qualitative research team and has an impressive portfolio of clients in health, transport, education and employment sectors.

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Alison Blair is a Managing Consultant in the International Survey Unit, where she has been responsible for large scale international research assignments. Alison's focus lies in the financial services research sector, where her expertise has been developed in managing projects ranging from customer satisfaction and thought leadership research to market demand studies.

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Maureen Treacy is a Managing Consultant in the International Survey Unit where she has been involved in a large number of ad hoc research projects. Types of research undertaken include group discussions, depth interviews, business to business research and organisational reviews. Maureen's key specialism is large scale local and international public sector research projects.

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Colette Duff is a Senior Consultant in the International Survey Unit where her experience is mainly in the area of business to business research. Colette has extensive experience in the identification of new product and service offerings to meet customer expectations and has specialist skills in multivariate statistical analysis.

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Amanda Fleming is a Senior Consultant in the International Survey Unit. Amanda has specialist skills in e-surveys and website usability testing. Her experience in this area spans finance, human resources and marketing/sales functions of local and international firms.

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