ADUK resource sheet

Commissioning market research

Writing a research brief

Liz Hill, *ArtsProfessional*

This resource is taken from Chapter 2 of *Commissioning Market Research - a guide for arts marketers*, by Liz Hill, published by the Arts Marketing Association.

Reproduced by kind permission of Liz Hill.

Copies of *Commissioning Market Research* are available for £5 (AMA members) or £10 (non-members) from http://www.a-m-a.co.uk/page.aspx?id=146

Please note that this resource was produced in 2000, and – while many of the core concepts are still relevant – specific details, legislation and web links may have changed.

Writing a research brief

Having identified the problems that have led to a need for information, the next step is to prepare a research brief that will help the researcher to design a suitable research methodology. The brief should include background material that helps the researcher understand why the project has come about, including the research problem and research decisions to be made; an indication of the type of people whose views should be sought during the research (known as 'the population'); and details of the information that must be generated.

Many arts organisations will feel sufficiently unclear about all this to want some help preparing a brief. Indeed the process of identifying research problems and information needs can be extremely complex for large projects, and taking advice from consultants who can help with this process (not necessarily the consultants or researchers who will ultimately conduct the research) can save time and money later on. It will also ensure that you fully understand the task that you want your researchers to undertake before you begin the process of selecting and commissioning them.

Structure of a brief

A document containing the sections indicated below would be a useful starting point for a researcher trying to prepare an appropriate research brief.

- **Elements of a research brief**
- **Background information about the organisation**
- **Purpose of the research**
- **Aims** – why is information needed and what will the research findings be used for?
- **Objectives** – what do you want to know when the research findings are reported?
- **Information needs** – what, in particular, do you need to find out about?
- **Population and segments of interest** – whose responses are you interested in?
- **Timescale** – by when must the research be completed?
- **Budget** – what is the maximum sum that will be spent on this research?
- **Reporting** – in what form must the findings be reported?
- **Closing date for proposals** – until when will research proposals be accepted?
- **Contact name and number** – who can provide further information or clarify the brief?

Background

This section should provide the prospective researcher with key information about your organisation - anything that helps someone outside the organisation understand its mission, the customer groups it serves, the products and services it produces or supplies, and the departments, funders and other stakeholders who may be interested in the research findings.

For example, it may be that the research is to be used in support of a bid for funding, or as supporting evidence in discussions with potential sponsors. Researchers need to know both the explicit and the hidden agendas for the research, if any, before they start.

Purpose of research

Researchers need to have a full understanding of the purpose of the research, so a brief should explain the aims of the research in terms of 'why' the organisation has decided to conduct the research and decisions that will be informed by the findings. Provided the research problem and research decisions have already been clearly articulated then stating the aims of the research should be a simple process. Following on from the aims, the objectives should be specified to make it clear exactly what must be discovered through the research project - in other words, what you want to know when the research findings are reported. They are important for two key reasons:

- They are the starting point for the rest of the research process, and are used as a guide to the type of information required and the best way of collecting it

- They help researchers highlight the most important issues when interpreting the findings and reporting results.

Objectives may be any one or a combination of three types.

1. Exploratory objectives are set when the nature of the research problem is unclear, or when an organisation needs preliminary information to formulate a 'hypothesis' (or 'hunch') which can then be tested in further research. They may be set if, for example, the organisation has an idea that it wants to develop, but isn't sure which way to go next; or if it can find no apparent explanation for a fall (or increase) in attendance, for example, and wants to identify possible reasons. Examples of exploratory objectives might be 'to identify areas of weakness in customer service' or 'to explore the impact a new venue might have on existing venues in the same catchment'.

2. When an organisation needs specific information to support specific decisions it should set descriptive objectives, as it will use the research findings to 'describe' the factors that will influence its decisions; for example, the potential market size for a new art form, or the attitudes and behaviour of key market segments. Descriptive objectives are usually set when an organisation wants to avoid the financial consequences of making a bad decision about something. Examples of descriptive objectives might be 'to identify the demographic profile of the most frequent attenders' or 'to distinguish between the behaviour of ticket bookers and attenders (i.e. those who rely on others to book their tickets)'.

3. Causal objectives are set if an organisation wants to understand more about the relationship between two factors. For example, 'how effective are our fundraising brochures at generating charitable donations?' or 'by what percentage will bookings increase if prices are reduced by 10%?' Answers to cause-and-effect questions such as these can help arts organisations improve their marketing tactics and forecast demand.

Information needs

It is helpful if the organisation commissioning the research can, as well as specifying objectives, be very precise about the actual information they need. The more precise they are, the less the researcher has to guess when designing a questionnaire and / or moderator guide. For example, if the objective is 'to identify areas of weakness in customer service', then the dimensions of the objective should be made clear. They may, for example, encompass box office services, front of house and catering. In that case, the information needs relating to all three should be specified. For example:

- ticket booking procedures;
- ease of telephoning the box office;
- ease of making online reservations;
- helpfulness of box office staff;
- clarity of booking forms;

- front of house;
- cleanliness of foyers;
- queues at cloakrooms;
- helpfulness of stewards;
- location of signage;
- clarity of signage;
- catering and bars;
- efficiency of service;
- courtesy of service;
- quality of food;
- value for money.

Population and segments of interest

A researcher will also need to know about the sort of person who is to be the subject of the research – known as the 'population of interest'. The gender, age and other personal characteristics of potential respondents may be relevant, depending on the objectives of the research. Are you interested in the views of all age groups, or just young people, for example? Also, do respondents have to fulfil certain criteria – such as having attended your art form or venue before, or simply being positive towards the arts? This information is critical when determining the method to be used for data collection. If you are only interested in the views of people who have attended a particular performance or exhibition, then it is quite easy to use mail or telephone research, or run a focus group using contact details from the organisation's own database (if it has one). On the other hand, if you are more interested in potential attenders than current attenders, data may have to be collected from a wider public.

Timescale

In general, you should specify a timescale for the research that delivers information to you in time to make any decisions, but that allows the research agency enough time to be thorough in its approach. You should also remember that most agencies and research consultants are not sitting around waiting for the phone to ring, but are busy with a range of projects that have to be scheduled into a heavy workload, so ensure that you give your preferred consultants time to slot you in. Different research methodologies are time-consuming in different ways, and there is usually a minimum time that it will take to implement a research proposal.

To run a focus group, for example, you must first allow time for recruiting the right potential attenders. A lead time of a least a couple of weeks between inviting someone to attend and the group actually taking place is ideal, if you want to ensure that busy people are represented in the group as well as those with fewer diary commitments. Furthermore, if you want a discussion between non-attenders, you may need to allow time to recruit people on the street, which can take even longer. Then, when the focus group is complete, you need to allow time for a transcript to be prepared from the tape of the meeting, and for the researcher to analyse and interpret what is usually quite a large volume of material.

Conducting a survey involves a range of quite different time constraints, depending on the data collection method chosen. First of all, you must always allow time for questionnaire piloting, and for the questions to be changed if necessary, in the light of the responses. Street surveys and telephone surveys can often be turned around quite quickly, but mail surveys must allow respondents plenty of time to reply – else you'll miss all those who are particularly busy, or away on holiday. On-site surveys of audiences or visitors often have to be conducted over a fairly long period too, to ensure that the sample is representative. If a multi-art form venue collects data over a single week when the only events running are a craft fair and a three-night fi lm programme, then the responses may be quite unrepresentative of the venue's core audience.

Budget

Some organisations which commission research take the view that the budget available for the project is a secret, and that by not revealing how much is available to be spent on the research, they will get the best deal. This is a fallacy. In the research brief you will state your objectives, but there are always a whole range of ways of achieving objectives, and different routes have their strengths and weaknesses. What's more, some routes are more expensive than others, and in general, the more you spend, the fuller and more reliable the data.

For example, let's suppose that you want to understand why people fail to renew their subscriptions. You could shed some light on the issue by running a single focus group, but a lot more could be revealed if you run groups with different segments (for example, those who still attend, but do not subscribe; and those who have not attended since their subscriptions ended). Even more information could be generated if the focus groups are followed by a survey of all lapsed subscribers.

Needless to say, it will cost a lot more to run both focus groups and a survey. It is therefore helpful if you indicate how much you have available to spend on the research, so that the researcher can tailor the proposal to fit within the financial constraints. If you don't, when the research proposals arrive you will be faced with the impossible task of comparing chalk with cheese.

Some proposals will assume that you favour a low price-tag over methodological completeness. Others will offer you whistles and bells and keep their fingers crossed that you need a Rolls Royce rather than a Mini. To make it easier to compare the proposals, by all means request a breakdown of costs, which will help you understand how the researcher will be allocating the budget.

Reporting requirements

Being specific about the form in which you require the findings to be presented will ensure that you are provided with information in a form that you can actually use.

There are three basic forms of reporting, and you should specify one or a combination of these:

1. **Data only.** If you, or someone in your organisation is particularly competent at handling data, you may require just the summaries of the data (presented as frequency tables and cross tabulations) and / or the transcripts of focus groups or depth interviews. If you go down this route, remember that you will have to draw your own conclusions from the data, and there is always a danger that your preconceptions will infl uence your interpretation for the findings

2. **Presentation.** A meeting, at which the researcher presents the findings, conclusions and recommendations from the research, gives you the opportunity to ask questions about important points that are raised. Researchers can be asked to prepare a presentation, and leave you with copies of presentation slides and summaries of data. This will be ideal if it is possible to gather together everyone with an interest in the research fi ndings, but less than satisfactory if the research fi ndings are to be disseminated more widely, or will used as supporting evidence for a Lottery bid, for example.

3. **Written report.** This is the most comprehensive form of research feedback, and has many advantages, not least the fact that it can be referred to by many people and referred back to over time. It is, however, likely to be the most expensive style of reporting, as it will include full explanations of the background, research methodology, data collection process, findings, conclusions and recommendations. It will also, include an appendix containing a summary of the data, which may be about the size of a small encyclopaedia! If you go down this route, you should specify the number of printed copies of the report you require, and whether or not you need it in electronic form.

At the end of the day, it's horses for courses: commission the type of reporting that will serve your purposes if you want to avoid being landed with the stereotypical report which sits on the shelf gathering dust.

Closing date for proposals

Your brief needs to indicate a date by which proposals must be submitted. Try to be realistic, and don't expect agencies to drop everything for your project. A good researcher will need time to think through the most appropriate methodology, and put together a comprehensive research proposal that addresses your information needs.

Contact name and number

Finally, you should give the name and contact details of the person who is able and willing to discuss the brief with the potential research suppliers if required. However straightforward you think your brief is, chances are there will be some issues to clarify before research suppliers feel confident at putting together a proposal. At this stage you might also like to give some details of any other stakeholders who have an interest in the research – a funding body that is footing the bill, for example. It is helpful if the person preparing a proposal knows who is likely to be reading and evaluating it.