

A decorative graphic in the top left corner consisting of two overlapping curved lines, one light grey and one light blue, forming a partial circle.

Notes on writing a research brief

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Notes on writing a brief for a market research project

The research brief is the first formal stage of any research project, and also one of the most important. A comprehensive brief ensures the smooth running of the research project, and helps the researcher (e.g. Wine Intelligence!) to understand precisely what is required by the client. Ideally, the brief serves to maximise the client's value for money by defining parameters concisely and by specifying the type of outputs required. A well written brief can also speed up the delivery of a project, as it can often reduce the time to set up a research project's design and analysis template.

In preparing a brief, it is important that the relevant individuals and departments within the client's organisation who will be involved in the project, or who will use the research, are all aware of and have signed on to the objectives. This guarantees everyone knows what to expect with the final outputs. It is always preferable to have a written rather than a verbal brief, as it can then be used for reference throughout the project, and make certain that the client's original objectives remain the focus of the research.

A written brief does not necessarily have to outline the technicalities of the research. Some clients have preferred methods for certain projects, and may have historical datasets that need to be updated in a consistent way. It is useful to know at the outset if the client would rather see a proposal for in-depth interview research, for example, versus a quantitative survey. Unless there is a strong preference or need, the method of research that best fits the research questions should probably be left for the researchers to set out in the research proposal - after all, it is their job, and they may come up with a great idea that hadn't been considered at the outset.

The "ideal" research brief comprises of six sections – as outlined below. This format is derived from academic literature (N K Malhotra and D F Birks). Please note there is an "other relevant information" section at the end which can be used to capture anything not covered up until that point.

Remember that work invested in a research brief is seldom wasted, and can often save both time and money in the long term.

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1. Background

It is important that the researcher understands the background of the research problem or opportunity that has arisen. Here it would be useful to have:

- A brief history of the company
- Factors that you believe might have contributed to the problem/opportunity
- What information you already have to hand that's relevant

2. Objectives

The objectives are a very important part of the research brief, and will be examined and developed in more specific detail in the research proposal. This section should talk about:

- What business decisions you need to make
- What insights you are looking for
- If relevant, who is the audience for the reporting – and what form it should take when being presented

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3. Scope and target of the research

This section should loosely outline the target group(s) that you want to investigate, if known. The target should be described in as much detail as possible, or if you are using a segmentation model, what sets the target(s) apart from others. You may wish to conduct the research in one location/geographical area, or several – this is where to specify the scope.

4. Time and budget

The main constraints of researching any business problem are time and money. If the budgets for both of these can be set out at the start of the project, it can save time and ensure that the research proposal remains within these guidelines of what is realistically achievable. If there are any other constraints, perhaps created by the nature of the business itself, these should also be stated here.

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5. Milestones and deliverables

This section should set out, as far as you know, any key project milestones, dependencies and deliverables. For instance, there may need to be an interim report, or a review by key stakeholders. For new concepts, the materials may only be available at a certain date because of design timelines. It would also be useful here to set out any preferences for what the final deliverable looks like. For instance, some clients like to have a concise management summary; others prefer extensive reporting and data tables.

6. Other relevant information

If there are any other factors that you believe are relevant, or other information that might be useful to a researcher that you haven't already mentioned, please note them here. This could include previous project outcomes, related ongoing work (eg advertising creative / planning, recent corporate mergers / acquisitions, or actions by competitors).

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