

## CFASMA1.5V4.0

# Develop and define segments within target groups to inform social marketing strategies



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### Overview

This unit is about defining segments of individuals or organisations within the overall target groups that have recognisable characteristics<sup>1</sup> which are sufficiently similar to allow them to be accessed by, and potentially responsive to, targeted social marketing programmes and interventions. This activity is often carried out to inform the development of a social marketing strategy; however, it is important that the definition of segments is kept continuously under review and refined in response to the results of social marketing activities.

This unit is for research managers and managers of social marketing programmes who develop and define segments within target groups in order to inform social marketing strategies.

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#### Performance criteria

- You must be able to:*
- P1 establish and agree with key stakeholders the overall social marketing goals, including:
    - P1.1 the issue(s) and behavioural challenges to be addressed
    - P1.2 the behaviour(s), including their underpinning beliefs, values and attitudes, to be influenced
    - P1.3 the target groups whose behaviour is to be influenced
  - P2 use valid analysis and interpretations of data and research findings to identify the characteristics which are common to, or distinguish between, members of the target groups
  - P3 identify segments within the target groups with characteristics which are sufficiently similar to allow them to be accessed by, and potentially responsive to, targeted social marketing activities
  - P4 describe your understanding of each segment in terms of:
    - P4.1 their salient characteristics
    - P4.2 the factors which influence their beliefs, values, attitudes and behaviour both positively and negatively
    - P4.3 the mix of activities that may be required to have a beneficial influence on their beliefs, values, attitudes and behaviour
    - P4.4 the mix of means through which they may be accessed
  - P5 identify and resolve any ethical issues arising from the segmentation in order to avoid unnecessarily excluding particular groups either directly or indirectly
  - P6 engage with the target groups and other key stakeholders to test your understanding of the segments
  - P7 compare your understanding of the segments with the understanding of others who have carried out similar work, for corroboration and/or contradiction of your understanding
  - P8 refine your understanding of the segments and propose these segments as the basis for testing social marketing activities
  - P9 continuously update your understanding and definition of the segments in the light of the results of social marketing programmes and interventions

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## Knowledge and understanding

*You need to know and understand:*

### **General Knowledge and Understanding**

- K1 analytical principles, methods, tools and techniques
- K2 anthropological theories relevant to the activity
- K3 communication principles, methods, tools and techniques
- K4 decision-making principles, methods, tools and techniques
- K5 duty of care towards target groups
- K6 evaluation principles, methods, tools and techniques
- K7 examples of effective and ineffective social marketing practice relevant to the activity
- K8 legal and organisational/partnership requirements relevant to social marketing
- K9 marketing research principles, methods, tools and techniques
- K10 objective setting principles, methods, tools and techniques
- K11 principles, methods, tools and techniques for addressing ethical issues
- K12 principles, methods, tools and techniques for engaging effectively with target groups and stakeholders, including vulnerable and hard-to-reach groups
- K13 psychological theories relevant to the activity
- K14 segmentation principles, methods, tools and techniques
- K15 social marketing principles, methods, tools and techniques
- K16 sociological theories relevant to the activity

### **Industry/Sector Specific Knowledge & Understanding**

- K17 current and emerging trends and developments in the sector internationally, nationally and locally
- K18 industry/sector, organisational/partnership and professional codes of practice
- K19 legal, regulatory and ethical requirements in the industry/sector

### **Context Specific Knowledge & Understanding**

- K20 codes of practice relevant to your role
- K21 organisational/partnership policies and procedures relevant to the activity
- K22 organisational/partnership vision, mission and strategic objectives
- K23 sources of advice, guidance and support
- K24 stakeholders and their diverse interests, needs, abilities and preferences
- K25 target groups, their diverse interests, needs, abilities and preferences
- K26 your own role and responsibilities

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## Additional Information

### Behaviours

1. generate and recognise imaginative and innovative solutions
2. present information clearly, concisely, accurately and in ways that promote understanding
3. show empathy with others' needs, feelings and motivations and take an active interest in their concerns
4. use your own experience and that of others, seeking specialist expertise where required
5. comply with, and ensure that others comply with, legal requirements, industry regulations, organisational policies and professional codes
6. identify and raise ethical concerns
7. establish and agree with key stakeholders measurable objectives
8. gather and analyse information from a variety of sources
9. keep confidential information secure
10. check the validity and reliability of information
11. use suitable, reliable and cost-effective methods to conduct quantitative and qualitative analysis of data
12. ensure effective engagement with target groups, policy makers and other key stakeholders
13. maintain up-to-date information on the political, economic, social, technological and legal factors that impact on work
14. identify the range of elements in a situation and how they relate to each other
15. build a total and valid picture from restricted or incomplete data

### Stakeholders

These include all those involved in, or affected by, the social marketing strategy and the issues it is seeking to address

### Key stakeholders

These are those with the greatest interest in or influence on the issues; they will always include the target groups or intended beneficiaries of the social marketing activity

There may be many dimensions to these characteristics, including socio-demographic (age, gender, marital/family status, sexual orientation, ethnicity, education, income, social class, working status, geographic location, physical/health status, mobility); behavioural (activities and interests, media usage, behaviour usage,); psychographic (needs, motivations, benefits sought, attitudes, beliefs, influences); dynamic (past and current behaviour in

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respect of particular social marketing goals, propensity/readiness to change, barriers to change), As used in the standards, "social marketing programme" encompasses longer-term (3 years) programmes, medium-term (1-3 years) campaigns and short-term (<1 year) targeted initiatives

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**Developed by** CFA Business Skills @ Work

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**Version number** 1

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**Date approved** March 2009

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**Indicative review date** March 2011

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**Validity** Current

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**Status** Original

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**Originating organisation** Chartered Institute of Marketing

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**Original URN** [ORIGINURN]

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**Relevant occupations** Arts, Media and Publishing; Health, Public Services and Care; Health and Social Care; Public Services; Animal care and veterinary science; Environmental conservation; Retailing and wholesaling; Performing Arts; History, philosophy and theology; Social sciences; Sociology and social policy; Education and training; Accounting and finance; Business management; Marketing and sales; Health and Social Services Officers; Health Professionals; Teaching Professionals; Health Associate Professionals; Protective Service Occupations; Finance; Communications; Personal Service Occupations; Sales and Customer Services Occupations; Business and Finance Associate Professionals

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**Suite** Social Marketing

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**Key words** social marketing research, CSR, data collection, behaviour, research, social marketing strategy, target groups, target marketing

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