Slice & Dice
How to Raise Money and Get People to Pay Attention Through Targeting
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mdwaskey
Objectives

01 Why segmenting is important

02 How to segment your audiences

03 How to use segmentation to communicate and persuade

04 Strategies to segment – a tool to help!
Why Should You Care?

1. Improve your business
2. Focus your messages
3. Spending less, better results
4. Wasting less
5. Knowing your audiences’ needs better
WHAT IF I TOLD YOU
CUSTOMER INSIGHTS AREN'T JUST A DREAM
Markets vs. Segments

• **Markets** are the potential group you could target
• **Segments** are groups within that market that will respond to marketing strategies similarly
Types of Segmentation

- Geographic
- Demographic (B2C, B2B)
- Psychographic
- Behavioral
It is distinct from other segments—other segments have different needs.

It is homogeneous within the segment—people have common needs.

It responds similarly to a market stimulus.

It can be reached by a market intervention.
Segmentation

• **Goal:** Better Communication, Better Persuasiveness

• **Determines:**
  - Who should be the object
  - What action
  - What results
  - How each element will fit
  - Who / What can help
  - When the action should occur
Looking For:

• Demographics
• Psychographics
• Behavioral
  • Self-Interests
  • Influentials
  • Current Relationship
Demographics

**B2C**
- Examples:
  - Geography
  - Gender
  - Education
  - Income

**B2B**
- Examples:
  - Location
  - Number of employees
  - Revenue
Psychographics

Based on Values, Attitudes and Lifestyles (VALS)

- Lifestyle
- Personality Traits
- Values
- Opinions
Behavioral

• Purchasing habits/ Service Utilization
• Frequency of Purchase/ Service consumption
• Spending Habits
• Loyalty
• Occasion / Timing
• Benefits Sought
Family Life Stage Segments

- **Leisure Activity Profile Data**
  - Frequency going out for fun: 1x/Week
  - Preferred destination: Bar, Clubs, Movies, Restaurants
  - Common reasons to go out: Happy Hour, Weekend, Dating, See Friends
  - Average expenditure per outing: $25.00

- **10% Young Singles**
  - 4x/Week
  - Bar, Clubs, Movies, Restaurants
  - Happy Hour, Weekend, Dating, See Friends
  - $25.00

- **8% Young Couples, No Kids**
  - 2x/Week
  - Restaurants, Movies, Live Music
  - Weekend, Anniversary, Birthday, See Friends
  - $43.00

- **28% Young Families**
  - 3x/Month
  - Parks, Movies, Museums, Family-Friendly Restaurants
  - Birthday, Anniversary, Date Night
  - $57.00

- **31% Families with Older Kids**
  - 4x/Month
  - Movies, Restaurants, Sporting Events
  - Birthday, Anniversary, Date Night, Kids’ Performances
  - $64.00

- **23% Empty Nesters**
  - 3x/Week
  - Movies, Restaurants, Cultural Events
  - Birthday, Change of Scenery, See Friends
  - $12.00
### Demographic and Behavior Snapshots Highlight the Vibrancy of Using VALS™

<table>
<thead>
<tr>
<th>Psychological Descriptors</th>
<th>Innovators</th>
<th>Thinkers</th>
<th>Believers</th>
<th>Achievers</th>
<th>Strivers</th>
<th>Experiencers</th>
<th>Makers</th>
<th>Survivors</th>
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<tbody>
<tr>
<td>Primary Motivation</td>
<td>Lifestyle Changers</td>
<td>Conservative</td>
<td>Economical</td>
<td>Aspirational</td>
<td>Fun Loving</td>
<td>Assertive</td>
<td>Hands-On</td>
<td>Cautious</td>
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<tr>
<td></td>
<td>Information Ready</td>
<td>Mature</td>
<td>Neighborly</td>
<td>Hardworking</td>
<td>Up to Date</td>
<td>Energetic</td>
<td>Practical</td>
<td>Loyal</td>
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<tr>
<td></td>
<td>Future Oriented</td>
<td>Reflective</td>
<td>Me-Too</td>
<td>Moderate</td>
<td>Overwhelmed</td>
<td>Optimistic</td>
<td>Self-Realt</td>
<td>Tradional</td>
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<tr>
<td>Median age</td>
<td>40</td>
<td>60</td>
<td>51</td>
<td>38</td>
<td>30</td>
<td>24</td>
<td>47</td>
<td>60</td>
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<tr>
<td>Median HHI</td>
<td>$118K</td>
<td>$107K</td>
<td>$55K</td>
<td>$104K</td>
<td>$33K</td>
<td>$70K</td>
<td>$55K</td>
<td>$24K</td>
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</table>

#### Percent of Population

<table>
<thead>
<tr>
<th></th>
<th>Innovators</th>
<th>Thinkers</th>
<th>Believers</th>
<th>Achievers</th>
<th>Strivers</th>
<th>Experiencers</th>
<th>Makers</th>
<th>Survivors</th>
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</thead>
<tbody>
<tr>
<td>Women</td>
<td>44</td>
<td>51</td>
<td>80</td>
<td>52</td>
<td>44</td>
<td>45</td>
<td>27</td>
<td>60</td>
</tr>
<tr>
<td>Married</td>
<td>46</td>
<td>77</td>
<td>59</td>
<td>85</td>
<td>27</td>
<td>21</td>
<td>72</td>
<td>37</td>
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<tr>
<td>Employed full-time</td>
<td>64</td>
<td>47</td>
<td>48</td>
<td>74</td>
<td>40</td>
<td>48</td>
<td>60</td>
<td>12</td>
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<tr>
<td>Live with a parent</td>
<td>14</td>
<td>2</td>
<td>7</td>
<td>7</td>
<td>25</td>
<td>48</td>
<td>7</td>
<td>3</td>
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<tr>
<td>Took a foreign trip in the past 3 years</td>
<td>51</td>
<td>40</td>
<td>17</td>
<td>30</td>
<td>14</td>
<td>23</td>
<td>17</td>
<td>10</td>
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<tr>
<td>Own a smartphone and a tablet</td>
<td>47</td>
<td>41</td>
<td>32</td>
<td>51</td>
<td>26</td>
<td>38</td>
<td>25</td>
<td>7</td>
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<tr>
<td>Own an internet-video device for TV</td>
<td>32</td>
<td>19</td>
<td>10</td>
<td>23</td>
<td>9</td>
<td>18</td>
<td>11</td>
<td>4</td>
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<tr>
<td>Buy “green” paper products</td>
<td>22</td>
<td>19</td>
<td>19</td>
<td>12</td>
<td>20</td>
<td>2-</td>
<td>19</td>
<td>23</td>
</tr>
<tr>
<td>Prayer is a part of my daily life</td>
<td>15</td>
<td>40</td>
<td>49</td>
<td>34</td>
<td>27</td>
<td>35</td>
<td>36</td>
<td>51</td>
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Source: VALS™/GfK MRI, Spring 2015
<table>
<thead>
<tr>
<th>Color</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
</table>
| Purple  | City Startups     | C3 Micro-City Blues  
Low Income Younger w/o Kids  
<35  
Renters  
White-Collar, Service, Mix  
Some College  
White, Black, Mix  
Shop at The Limited  
Attend college football games  
Read GamePro  
Watch Guiding Light  
Suzuki Reno |
| Green   | Young & Rustic    | T4 Rustic Living  
Lower-Mid Middle Age w/o Kids  
<55  
Renters  
White-Collar, Service, Mix  
Some College  
White, Black, Mix  
Shop at Wal-Mart  
Eat at Captain D's  
Read Brides  
Watch WWE Wrestling  
Dodge Stratus |
| Yellow  | American Classics | S4 Inner Suburbs  
Downscale Mature w/o Kids  
65+  
Mostly Owners  
Mostly Retired  
High School Graduate  
White  
Shop via mail order  
Gamble in Atlantic City, NJ  
Read weekend newspaper  
Watch The 700 Club  
Chevrolet Malibu |
| Orange  | Kid Country, USA  | T3 Middle America  
Lower-Mid Younger w/ Kids  
25-44  
Mix, Owners  
Blue-Collar, Service, Mix  
High School Graduate  
White, Black, Hispanic, Mix  
Order from BMG Music  
Buy infant toys  
Read Fit Pregnancy  
Watch Nick at Nite  
Nissan Titan |
Demographics vs. Archetypes

25-45 year old married women, with children, with average annual household incomes of >$50,000.

Jane Doe is pregnant with her and her husband Juan’s first child and has realized that their one bedroom apartment isn’t going to cut it. They would like to find a home in which to raise their family. Jane is a tenure-track junior professor of psychology at the local college and Juan is a firefighter. They have just relocated to the area and have little knowledge of it and no family or friends nearby to lean on for advice.
ABOUT
John is a graduate student at UCLA who cares deeply about animal rights. He spares his own time to volunteer at the local animal shelter and to promote pet adoption. He wishes to order some design artifacts to raise awareness at his school.

AGE 28
OCCUPATION Ph.D Student
INCOME Less than $50k
STATUS Single
LOCATION Los Angeles, CA

NEEDS
• Create designs that promote animal adoption
• Order design artifacts such as posters, badges and buttons to distribute them to students
• Help with the crowdfunding

FRUSTRATIONS
• Some vendors charge way too much for the designs
• Connecting with the local vendors require extra time on his end
• If he ends up not getting the funds, he has to put in his own money

SOCIAL MEDIA ACTIVITY
FACEBOOK
INSTAGRAM
TWITTER
SNAPCHAT

CURRENT FEELINGS
Stressed  Concerned  Busy

PERSONALITY
PASSIONATE  MOTIVATIONAL
GIVING  LOVING  OPTIMISTIC

USER PERSONA
John Doe
“I care deeply about animal rights and to help them live happier lives”
Jill Anderson

Bio
Jill is a Regional Director who travels 4-6 times each month for work. She has a specific region in which she travels, and she often visits the same cities and stays at the same hotel. She is frustrated by the fact that no matter how frequently she takes similar trips, she spends hours of her day booking travel. She expects her travel solutions to be as organized as she is.

Goals
- To spend less time booking travel
- To narrow her options quickly

Frustrations
- Too much time spent booking - she's busy!
- Too many websites visited per trip
- Not terribly tech savvy - doesn’t like the process

Motivations
- Price
- Comfort
- Convenience
- Speed
- Loyalty/Miles

Preferred Channels
- Chrome
- Mobile
- Email
- Traditional Ads

Brands
- KAYAK
- Expedia
- ACE HOTEL
- lyft

“I’m looking for a site that will simplify the planning of my business trips.”

AGE: 35
WORK: Regional Director
FAMILY: Married, 1 Child
LOCATION: Austin, Tx
ARCHETYPE: The Frequent Flyer

Personality
- Introvert
- Analytical
- Loyal
- Passive
- Extrovert
- Creative
- Flexible
- Active
### TOBI DAY

<table>
<thead>
<tr>
<th>AGE</th>
<th>26</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCCUPATION</td>
<td>Record Store Manager</td>
</tr>
<tr>
<td>STATUS</td>
<td>Single</td>
</tr>
<tr>
<td>LOCATION</td>
<td>New York, NY</td>
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<tr>
<td>TIER</td>
<td>Enthusiast</td>
</tr>
<tr>
<td>ARCHETYPE</td>
<td>The Maestro</td>
</tr>
</tbody>
</table>

#### MOTIVATIONS
- Incentive
- Fear
- Achievement
- Growth
- Power
- Social

#### GOALS
- To grow a strong industry reputation
- To build an audio-pro portfolio
- To keep track of everything

#### FRUSTRATIONS
- Slow download times
- Data crashes
- Poor communication

#### TECHNOLOGY
- IT and Internet
- Software
- Mobile Apps
- Social Networks

#### PERSONALITY
- Extrovert
- Introvert
- Sensing
- Intuition
- Thinking
- Feeling
- Judging
- Perceiving

#### BIO

Tobi has a day job at a record store, but on the side she does all kinds of production work for up-and-coming artists. She never hesitates to learn something new and she often acts as tech support for her friends and clients. She is usually working on a dozen projects at a time and is trying to establish herself in the industry, so she hates data crashes or anything that makes her look bad. Because she works alone and in her home, collaboration is everything.

“If I had a way to share projects and collaborate in real time, that would make my workload so much easier to manage.”
Zero Budget Doesn’t Mean You Can’t
Zero Budget Doesn’t Mean You Can’t

Use research closest to your actual audience

1. Personal interviews, surveys, focus groups that are representative
2. General data from your audiences – Google analytics, Facebook Insights
3. Past research that meets the first two categories
4. Industry specific data and/or local data – white papers, case studies, Census
5. Same-vertical data—white papers, case studies
6. National data – demographic tools, general behavior tools
Zero Budget Doesn’t Mean You Can’t

01 Social Media
02 Email or Physical Survey
  • Survey Monkey & Mail Chimp
03 Focus Groups
04 Google Analytics – turn demographics on!
Aggregated demographic data about the people who like your Page based on the age and gender information they provide in their user profiles.

**Country** | **Your Fans** | **City** | **Your Fans** | **Language** | **Your Fans**
--- | --- | --- | --- | --- | ---
United States of America | 103 | Erie, PA | 35 | English (US) | 107
Bangladesh | 3 | North East, PA | 11 | English (UK) | 4
China | 3 | Meadville, PA | 10 | Simplified Chinese (China) | 3
India | 2 | Beijing, China | 3 | French (France) | 1
United Kingdom | 1 | Fairview, PA | 3 | | |
Morocco | 1 | Dhaka, Dhaka Division, | 3 | | |
Myanmar | 1 | Buffalo, NY | 2 | | |
Pakistan | 1 | Cochranton, PA | 2 | | |
| | | Sarasota, FL | 2 | | |
Pittsburgh, PA | 2 | | | |
Zero Budget Doesn’t Mean You Can’t

strategicbusinessinsights.com/vals/

factfinder.census.gov/

claritas360.claritas.com/mybestsegments/

Makemypersona.com

pewresearch.org/download-datasets/

economy.com/indicators/
Making Messages & Persuading
How to Use the Information

Self Interests / Pain Points
- Messages

Influentials
- Channels

Current Relationship
- Style and Timing
Vanessa, 25
The Young Professional Volunteer Persona

“Volunteering at Make-A-Wish® helped me make an impact — and make new friends who have helped me feel at home.”

How to Connect

- Tell her how Make-A-Wish volunteers are heroes. She wants to know that she can play a role in helping wish kids and their families gain experiences that change their lives and help them heal.
- Let her know that Make-A-Wish volunteers are diverse and they help children from all backgrounds.
- Show her how Make-A-Wish has helped people like her get through a difficult period in their lives.
- She is interested in connecting to corporate partners through the lens of employee engagement. Her interest in giving back drives her career and workplace decisions.

My Traits

- Moving from place to place
- Always online
- Looking for new friends
- Helpful

Manuel, 27
The Millennial Donor Persona

“I don’t want to give to institutions. I want to give to solve problems.”

How to Connect

- Tell him that donating to Make-A-Wish will connect him to people who share his interests and values.
- Show him how small donations add up to make a meaningful difference for wish kids.
- Tell him how Make-A-Wish donors change the lives of kids from diverse backgrounds.
- Connect him with former wish kids who can offer perspectives on lives that were formed from their uniquely challenging circumstances.
- He’s interested in supporting Make-A-Wish corporate partners that communicate authenticity.

My Traits

- Digital native
- Difficult to earn his attention
- Looking to meet new friends
- Values authentic brands

Learn more about these supporter personas at: wish.org/contentstrategy
MARILYN KIM: THE OUTSIDER

The Facts
- Age: 37
- Income: ~$100,000
- Hometown: Indianapolis
- Technical: Has a smartphone, iPad and laptop

Riley Connection
- Previous donor and parent but has no real connection to Riley

Needs
- Find out how to donate toys to Riley
- Knowledge about how recurring donations can have a huge impact
- Understand Riley’s reach in her community through the Hospital, Museum, Camp and other programs

“I’m interested in finding out how I can donate some toys to the kids at Riley to teach my daughter about giving back.”

MATT AND LEE: MAJOR DONORS

The Facts
- Age: 55
- Income: Major gift level
- Hometown: Indianapolis
- Technical: Have an iPad that they use for email and Internet access

Riley Connection
- Lost a child and love children. Very involved in Women for Riley. Give back so children have the best chance at a healthy life.

Needs
- Confirmation that Women for Riley makes a difference.
- Knowledge about fundraising events.
- See stories about how Riley helps children and understand the impact of their donations.
- Understanding that Riley is a national leader in research and clinical care.

“We visit the website to find out about fundraisers to attend. We also like seeing and hearing about the kids/survivors at Riley.”

Women for Riley
- Compassionate
- Give Back
- Influencers
A Starting Point

[Table]

**Step 1: A little about me**

<table>
<thead>
<tr>
<th>BACKGROUND</th>
<th>PERSONALITY</th>
<th>DEMOGRAPHICS</th>
</tr>
</thead>
<tbody>
<tr>
<td>My job is...</td>
<td>Traits that describe me</td>
<td>Age</td>
</tr>
<tr>
<td>In five years, my career...</td>
<td>My hobbies include...</td>
<td>Gender identity</td>
</tr>
<tr>
<td>My family...</td>
<td>Outside of work...</td>
<td>Income</td>
</tr>
<tr>
<td>My social circle...</td>
<td></td>
<td>Location</td>
</tr>
</tbody>
</table>

**Step 2: What I care about**

<table>
<thead>
<tr>
<th>CAUSES I'M PASSIONATE ABOUT</th>
<th>REASONS I WOULDN'T GIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macro or global issue</td>
<td>General objection</td>
</tr>
<tr>
<td>Macro or global issue</td>
<td>General objection</td>
</tr>
<tr>
<td>Micro or local causes</td>
<td>Specific concern</td>
</tr>
<tr>
<td>Micro or local causes</td>
<td>Specific concern</td>
</tr>
<tr>
<td>In a perfect world...</td>
<td>The biggest reason I don't give...</td>
</tr>
</tbody>
</table>

**Step 3: How to talk to me**

**HOW ARE YOU IMPACTING ISSUES I CARE ABOUT?**
- Program #1
- Program #2
- Advocacy effort #1
- Advocacy effort #2
- Campaign #1
- Campaign #2

**WHERE/HOW I LIKE TO COMMUNICATE**
- Communication method #1
- Communication method #2
- Communication method #3
- Don't contact me...

**FUNDRAISING ELEVATOR PITCH**
- What you want me to do
- How you want me to do it
- How my donation is helping my "perfect world" become a reality
- Why I should give, despite my concerns

Final Points

Your target IS NOT everyone!

Try It ... Then, Update and Refine

Share Your Personas With Everyone in Your Organization
Now, Go Slice and Dice
...Responsibly

Thank You!