**wood for trees**
a MyLife Digital company

case study

Institute of Fundraising
INSIGHT IN FUNDRAISING AWARDS 2018

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# A strategic segmentation to revitalise BHF's communications strategy

British Heart Foundation

## Background:

**BHF is one of the UK's most active and successful charity organisations. It uses some 70-plus fundraising products, requiring a clear strategic framework to ensure that each one pulls its weight. Wood for Trees, with Critical Research and Roger Lawson Consulting, worked with BHF to develop a new supporter segmentation that would shape BHF's future fundraising strategy.**

## Proposed segmentation:

**Proximity vs. Passion by segment**
**(bubble size represents size of segment)**



## Problem:

BHF knew that in recent years they had lost some of the required critical focus on exactly who their supporters were. They needed a new supporter segmentation to help build more accurate and efficient marketing programmes and to provide a current an up-to-date set of parameters that could inform the development of new products and audiences.

It was essential that the new segmentation was based on pragmatic and actionable objectives, so it could win all-important buy-in from the outset as a key tool to inform direct marketing and communications messaging strategy. A key objective was to understand why supporters connected with BHF, so they could refine their messaging. In other words, don't just label someone as a 'cash donor' because that's what they do, but understand what it is that drives them to give cash.

## Solution:

The methodology combined attitudinal and behavioural techniques. Qualitative research enabled the project to dive deep into supporters' emotional connections with the charity, and this was followed up by quantitative research among a large-scale representative sample of 3,000 UK adults.

The research responses were then fed into the segmentation using a range of analytical tools to develop key themes, cluster responders by these themes and iteratively reduce the elements to the optional solution. The segments were then described in more depth and detail to facilitate targeting through campaigns and media planning and to predict the attitudes of current supporters so that they could be engaged in appropriate ways.
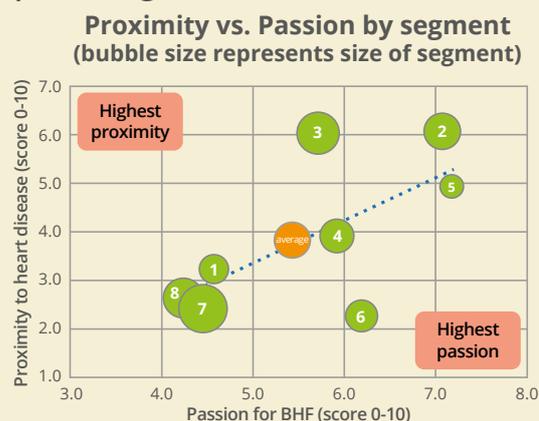
## Results:

Around half the population broadly identifies as a BHF supporter, so the importance of this segmentation can't be overstated.

The project identified seven major segments, differentiated on a scale of proximity to heart disease and on proximity to BHF. Each segment was fully described in terms of attitudes, but also in terms of demographic make-up and their charitable behaviours – both towards BHF and the wider market.

Despite the fact that the segmentation only came into use in early 2018, the strategic effect is already profound. From the staged delivery of the programme alone, there have been a number of wins. These definitions are more accurate, more descriptive and more usable than any previous segmentation. The research, both qualitative and quantitative, and the development of the segment descriptions, delivered insights that truly galvanised internal engagement.

## Conclusion:

Bob Francis, BHF's Head of Customer Insight and Analysis, said: *"The segmentation has enabled us to re-evaluate our product list and it's driving a gradual strategic move from developing one-off products to focusing on a longer-term LTV-aligned approach.*

*A customer-first approach is a new focus. Instead of 'here's a good product, who shall we market it to?', it's now 'these are our most important supporters – how do we encourage their loyalty and prompt their donations?'"*