

A hand holding a magnifying glass over a 3D pie chart with white figures on it. The pie chart is divided into three segments: blue, green, and yellow. The figures are standing on the segments, and the magnifying glass is focused on the yellow segment. The background is a light gray surface.

# Unpacking Segmentation: The Road from Demographics to Psychographics and Beyond

DEEP-DIVE PRESENTATION

# About Jimmy Newson

**Founder & CEO:** Moving Forward Small Business.

*Contributor/ Entrepreneur.com*

Jimmy Newson, also known as the Impact Influencer, is a business and growth strategy consultant, international speaker, and Moving Forward Small Business founder. He specializes in working with small businesses and entrepreneurs and is a contributor and Leadership Network member with Entrepreneur.com. Newson holds industry certifications in Google, HubSpot, SEMrush, Cascade, and Trainual and serves as a board and committee member for various private, government, and nonprofit organizations.



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AI will be a critical component in unlocking the full potential of market segmentation by providing deeper, more actionable insights into consumer behavior.

*Sundar Pichai – CEO of Google*



# What We Will Discuss Today:

- . The Types and Importance of Segmentation
- . Psychographic Segmentation (WHY)
- . Behavioral Segmentation (HOW)
- . Demographic Segmentation (WHO)
- . Geographic Segmentation (WHERE)
- . Transactional Segmentation (WHAT)
- . Integration and Automation Segmentation

# The Types & Importance of Segmentation

# Types of Market Segmentation





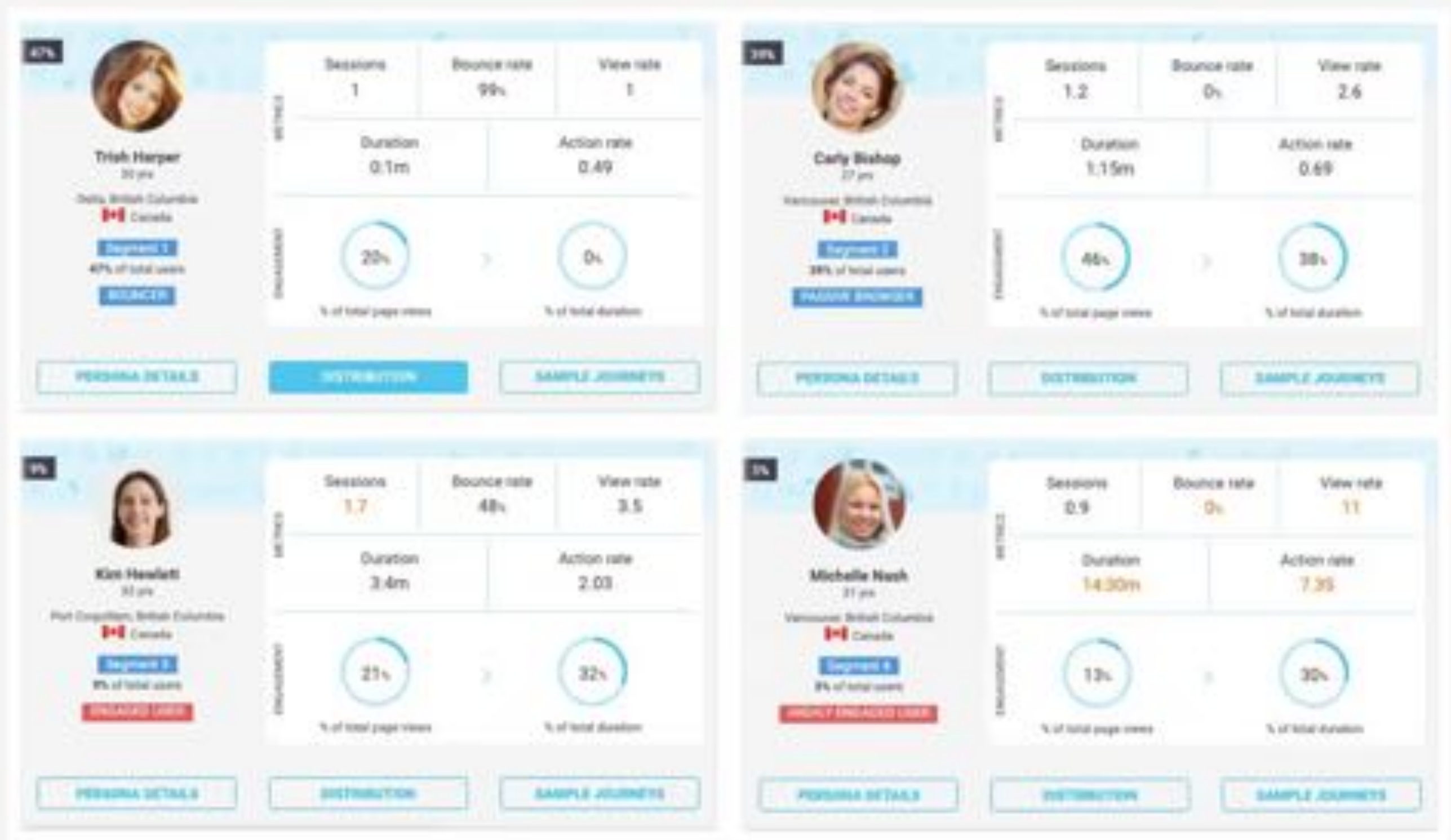
# The Types & Importance of Segmentation

- **Enhanced Targeting Precision:** Effective marketing segmentation allows for the identification of distinct customer groups, enabling more precise targeting and tailored messaging that resonates deeply with each segment.
- **Optimized Resource Allocation:** By focusing on specific segments, businesses can allocate their marketing resources more efficiently, ensuring that time and budget are invested where they yield the highest returns.
- **Improved Customer Satisfaction:** Tailoring products and communications to meet the specific needs and preferences of different segments results in higher customer satisfaction and loyalty, fostering stronger brand relationships.
- **Competitive Advantage:** Understanding and addressing the unique characteristics of each market segment provides a strategic edge, differentiating a brand from its competitors and positioning it more effectively in the market.



# Automatic Marketing Segmentation

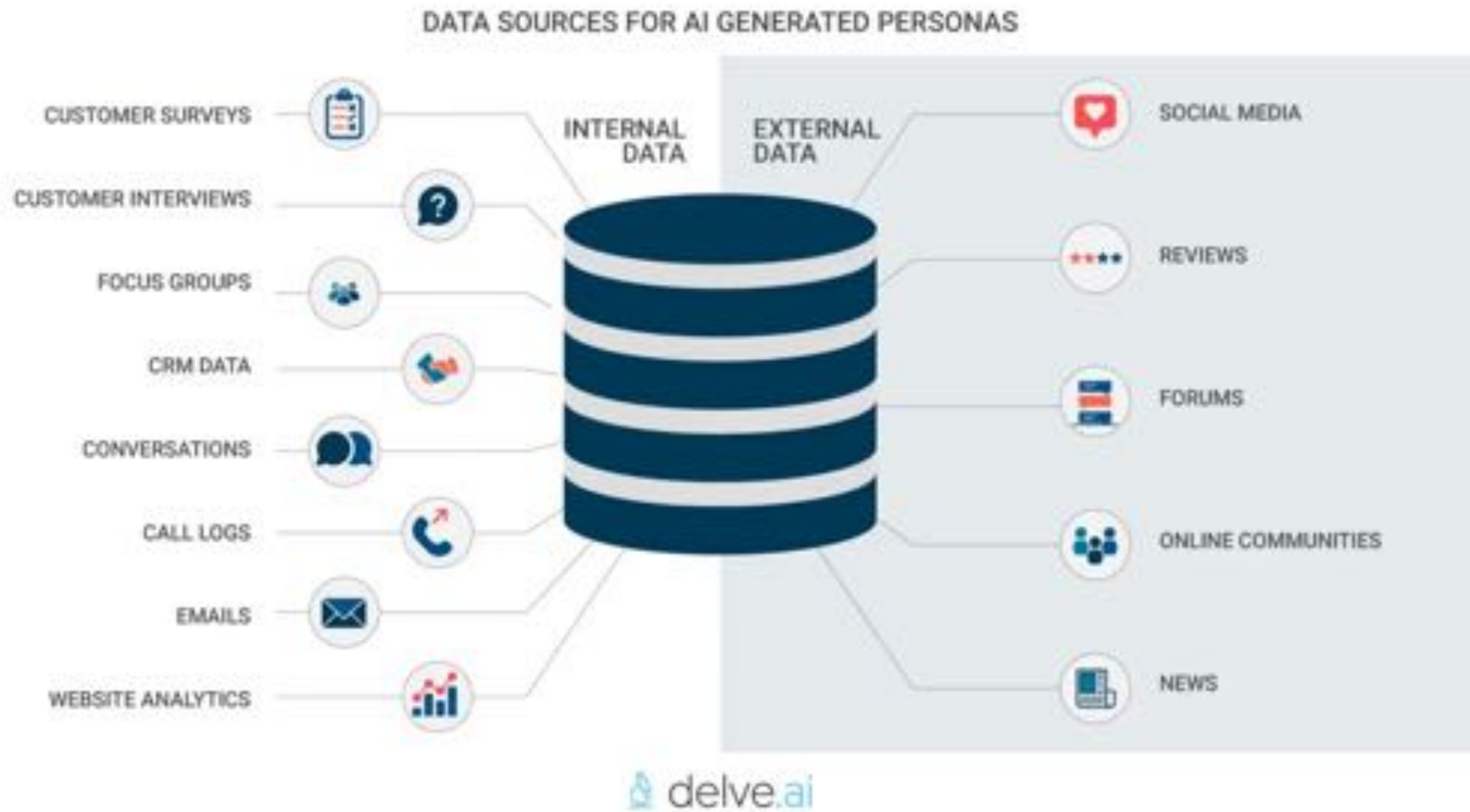
Get answers to questions such as: How many types of users do I have? How do they differ in their interactions? Which are my desirable segments?





# AI-generated, Data-driven Personas

Create rich personas automatically for your B2C/B2B clients leveraging first-party data sources and public sources



# Psychographic Segmentation (WHY)

# Psychographic Segmentation (WHY)



Use inferred psychographic attributes related to lifestyles, preferences, interests, hobbies, and values for effective segmentation



# Psychographic Segmentation (WHY)

## Definition and Importance

- Psychographic segmentation categorizes consumers based on psychological traits.
- It's vital for creating targeted marketing strategies that resonate deeply with specific audience segments.

## Key Attributes

- Includes consumers' lifestyles and personal values.
- Encompasses interests, hobbies, and preferences.

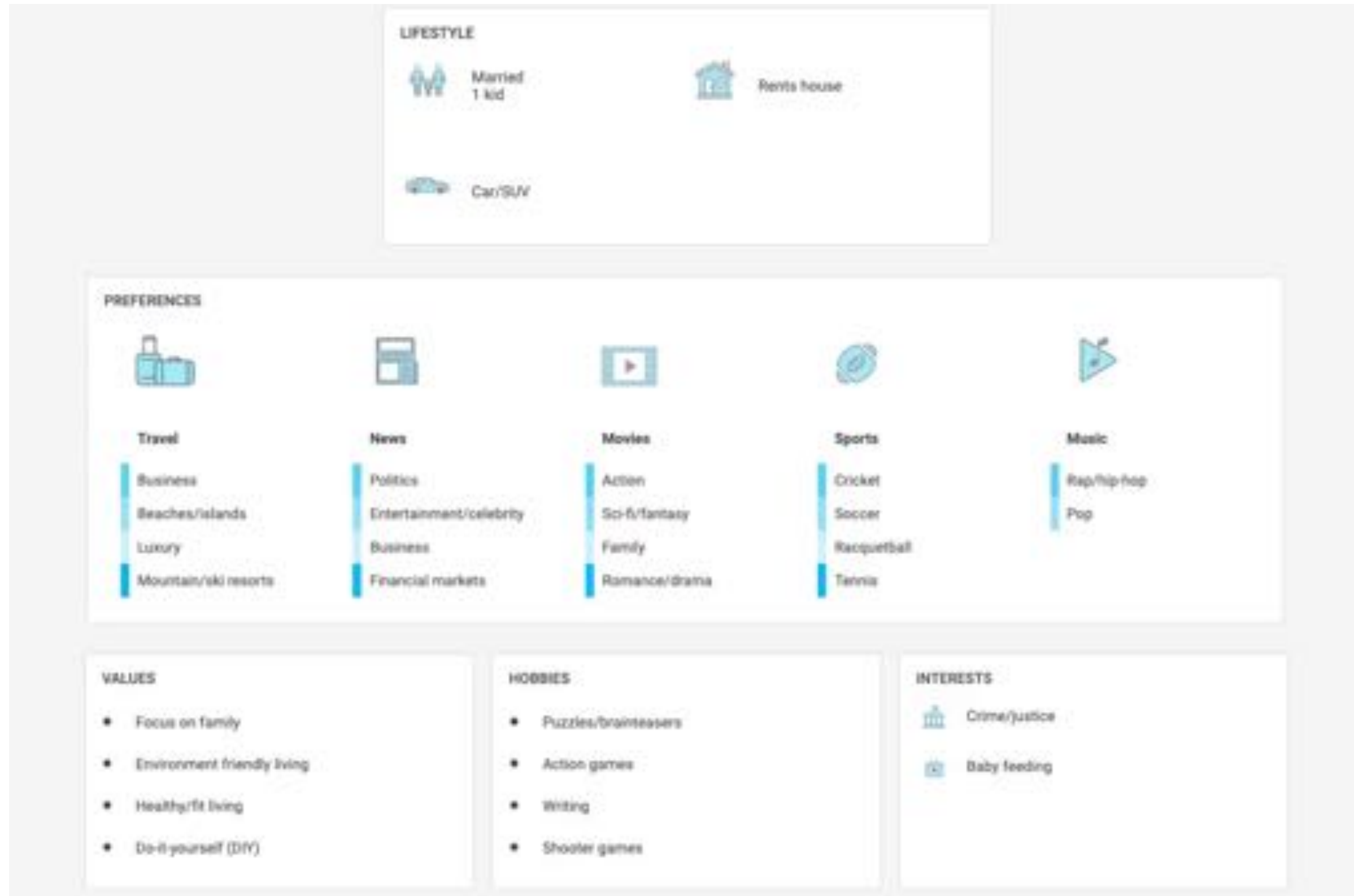
## Analysis Techniques

- Utilizes surveys and focus groups to gather psychographic data.
- Employs data analytics and social media insights for deeper understanding.



# Psychographic segmentation (WHY)

Use inferred psychographic attributes related to lifestyles, preferences, interests, hobbies and values for effective segmentation



# Behavioral Segmentation (HOW)



# Behavioral Segmentation (HOW)



Account for all behavioral activity, including engagement, events/actions, context, intent, and decision phase

# Psychographic Segmentation (HOW)

## Definition and Importance

- Behavioral segmentation categorizes users based on their actions and interactions.
- It's crucial for tailoring marketing strategies to specific user behaviors.

## Key Attributes

- Engagement, events/actions, context, intent, and decision phase are vital attributes.
- These attributes help in comprehensively understanding user behavior patterns.

## Analysis Techniques

- Techniques include tracking user activities and analyzing behavioral metrics.
- Data interpretation methods help derive actionable insights from user behavior.



# Behavioral Segmentation (HOW)

Account for all behavioral activity, including engagement, events/actions, context, intent and decision phase





# Demographic Segmentation (WHO)

# Demographic Segmentation (WHO)



Segment by age, gender, and language for B2C businesses and by industry, company size, job function, and seniority for B2B businesses

# Psychographic Segmentation (WHO)

## Definition and Importance

- Demographic segmentation is the process of dividing a market into distinct groups based on demographic variables.
- It helps businesses target specific customer needs and preferences effectively.

## Key Attributes

- B2C attributes include age, gender, and language.
- B2B attributes include industry, company size, job function, and seniority.





# Demographic Segmentation (WHO)

Segment by age, gender and language for B2C businesses and by industry, company size, job function and seniority for B2B businesses

The screenshot displays a user management interface with a sidebar on the left and a main content area. The sidebar lists various user management actions like 'View', 'Edit', and 'Delete' for different segments. The main content area shows a grid of user profiles, each with a profile picture, name, title, location, and a set of performance metrics. The metrics are presented in a grid format with circular progress indicators.

User Name	Role	Location	Sessions	Source rate	View rate	Duration	Conversions
Charlotte Parker	Chief Customer Officer	New York, New York	1.1	6%	1.2	1.2m	0
Shona Fogel	Supervisory Analyst	New York, New York	1.5	9%	0.8	0.2m	0
Esther Calvert	Chief Operating Officer	New York, New York	1.7	6%	2.2	1.13m	1.22
Joseph Cassidy	Chief Operating Officer	New York, New York	4.3	23%	4.8	5.12m	6.98

# Demographic Segmentation (WHO)

Segment by age, gender and language for B2C businesses and by industry, company size, job function and seniority for B2B businesses

The screenshot displays a user profile for Joseph Cassidy, a 44-year-old male Chief Operating Officer at The Star Group in Orlando, Florida. The profile includes a photo, a quote about his focus on efficient processes and growth, and a map of Orlando. The profile details are as follows:

- PROFILE:** Joseph Cassidy is a 44-year-old male Chief Operating Officer at The Star Group in Orlando, Florida. He is a millennial leader in management consulting with a focus on business operations.
- RESPONSIBILITIES:** As the COO, Joseph is responsible for overseeing the daily operations and strategic planning at The Star Group. He ensures efficiency and productivity across various departments.
- REPORTS TO:** Joseph reports directly to the CEO of The Star Group.
- JOB TO BE DONE:** Joseph's main job is to streamline processes, optimize resources, and drive company growth while maintaining a high level of client satisfaction.
- FACTORS INFLUENCING PURCHASE DECISIONS:** Joseph values quality services, innovative solutions, and reputable partnerships when making purchase decisions for The Star Group.
- ROLE IN DECISION MAKING PROCESS:** Joseph plays a key role in operational decision-making, providing insights and recommendations to the CEO based on his expertise and knowledge of the industry.
- PERCEIVED BARRIERS:** Joseph may face challenges in balancing operational demands, implementing new technologies, and adapting to market changes in the consulting industry.



# Geographic Segmentation (WHERE)

## Geographic Segmentation (WHERE)



Combine with geographic context at the city, region, country, sub-continent, and continent levels



# Psychographic Segmentation (WHERE)

## Definition and Importance

- Geographic segmentation involves dividing a market based on geographic boundaries.
- It's crucial for targeting marketing efforts to specific locations.
- Helps businesses tailor products and services to local needs and preferences.

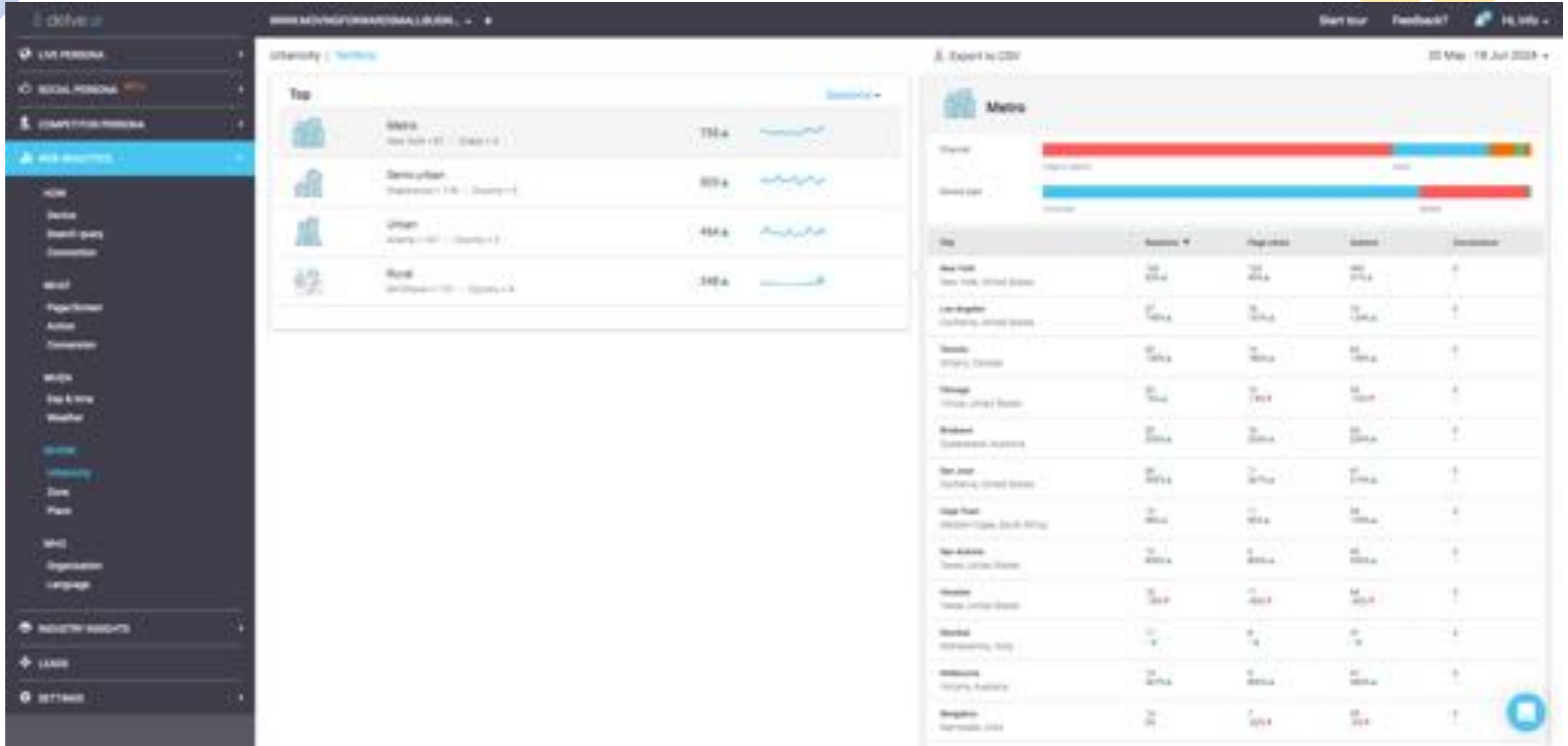
## Key Attributes

- **City:** Targeting specific urban areas.
- **Region:** Focusing on broader areas within a country.
- **Country:** Segmenting based on national borders.
- **Sub-continent:** Addressing areas within a larger continental region.
- **Continent:** Broadest segmentation based on large landmasses.



# Geographic Segmentation (WHERE)

Combine with geographic context at the city, region, country, sub-continent and continent levels



# Geographic Segmentation (WHERE)

Combine with geographic context at the city, region, country, sub-continent and continent levels

The dashboard displays geographic segmentation data. The left sidebar lists navigation options: All Regions, Social Media, Campaigns, Web Analytics, and Monthly Reports. The main content area is divided into two panels:

- Top:** A list of categories with their respective counts and trend indicators. The categories and their counts are: Daily (1004), Week (884), Day (1004), Hour (1004), Sub-continent (884), and Continent (774).
- Country:** A horizontal bar chart showing the distribution of data across countries, followed by a table with columns for Country, Revenue, Profit, Growth, and Market Share.

# Transactional Segmentation (WHAT)



## Transactional Segmentation (WHAT)



Leverage order data from e-commerce sites and goals from lead generation/B2B websites to identify high- and low- valued buyer segments

# Psychographic Segmentation (WHAT)

## Definition and Importance

- Transactional segmentation divides customers based on their purchase behaviors.
- Helps in targeting marketing strategies more effectively.
- Enhances customer experience and increases conversion rates.

## Key Attributes

- **Order data:** Track purchase frequency, value, and product types.
- **Lead generation goals:** Focus on acquiring new customers.
- **B2B websites:** Aim for quality leads that can convert into long-term clients.



# Transactional Segmentation (WHAT)

Leverage order data from e-commerce sites and goals from lead generation/B2B websites to identify high- and low- valued buyer segments

The screenshot displays a marketing analytics dashboard with a dark sidebar on the left and a main content area. The sidebar includes navigation options like 'LIVE PERSONAS', 'SOCIAL PERSONAS', 'COMPETITIVE PERSONAS', and 'WEB SEGMENTS'. The main content area is divided into two panels. The left panel, titled 'Page Type | Transactional', shows a list of page types with their respective counts and trends. The right panel, titled 'Export to CSV', shows a 'Loyalty' section with a horizontal bar chart and a table of data.

Page Type	Count	Trend
Products/Services	1024	↑
Reviews	1024	↑
Help	1127	↑
Blog Articles	104	↑
Images/Audio/Video	104	↑
Loyalty	104	↑
Partners	119	↑
FAQ	119	↑
FAQ	104	↑
Education	119	↑
Cart/Checkout	104	↑
Blog	104	↑
Log into account	104	↑

Page Type	Count	Page Type	Count	Count
2025: New to the Top Strategic Goals Report Series	104	104	104	104
Using Personalized Content: What Works, What Not	104	104	104	104
2025: New Strategic Goals Report Series: What Works, What Not	104	104	104	104
Improving Content - Using Personalized Content	104	104	104	104
Using Personalized Content Series	104	104	104	104

# Transactional Segmentation (WHAT)

Leverage order data from e-commerce sites and goals from lead generation/B2B websites to identify high- and low- valued buyer segments

The screenshot displays a marketing analytics dashboard with a dark sidebar on the left and a main content area. The sidebar includes sections for 'LIVE PERSONAS', 'SOCIAL PERSONAS', 'COMPETITOR PERSONAS', and 'WEB PERSONAS'. The main content area is titled 'Page flow - Decision phase' and features a table of page flow items. To the right, there is a section titled 'Intent to convert' with a horizontal bar chart and a table of data points.

Page flow	Count	Percentage	Change
Search (Search results)	1204		
View product (Product page)	1194		
Cart (Cart page)	884		
Out payment (Checkout)	814		
Payment (Payment page)	479		
Process of conversion (Confirmation)	389		
Receipt (Receipt page)	379		
Site (Site)	29		
Errors (Errors)	24		

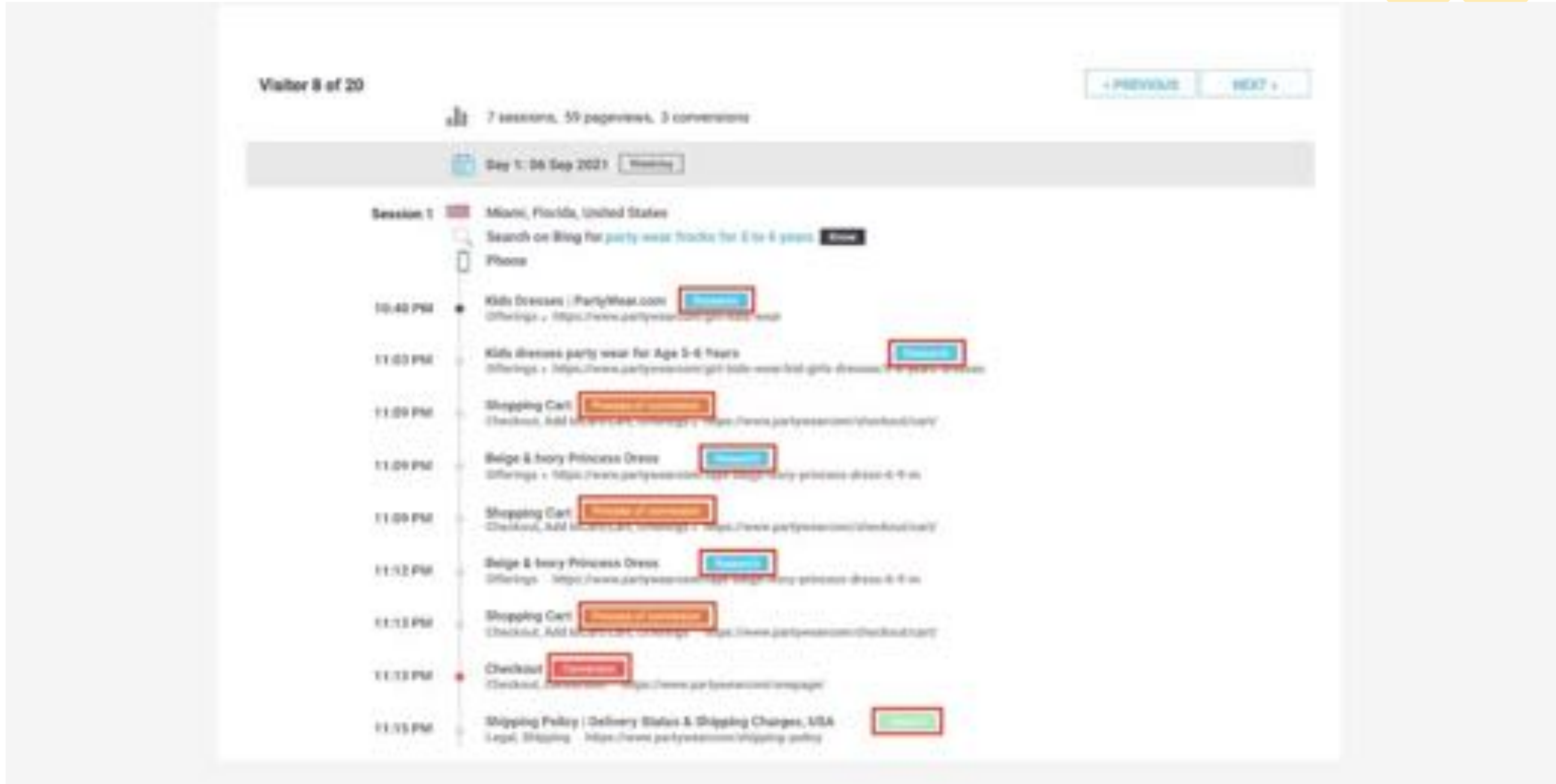
  

Page flow	Count	Percentage	Change
Search (Search results)	1204	100%	
View product (Product page)	1194	99%	
Cart (Cart page)	884	74%	
Out payment (Checkout)	814	67%	
Payment (Payment page)	479	40%	
Process of conversion (Confirmation)	389	32%	
Receipt (Receipt page)	379	31%	
Site (Site)	29	2%	
Errors (Errors)	24	2%	



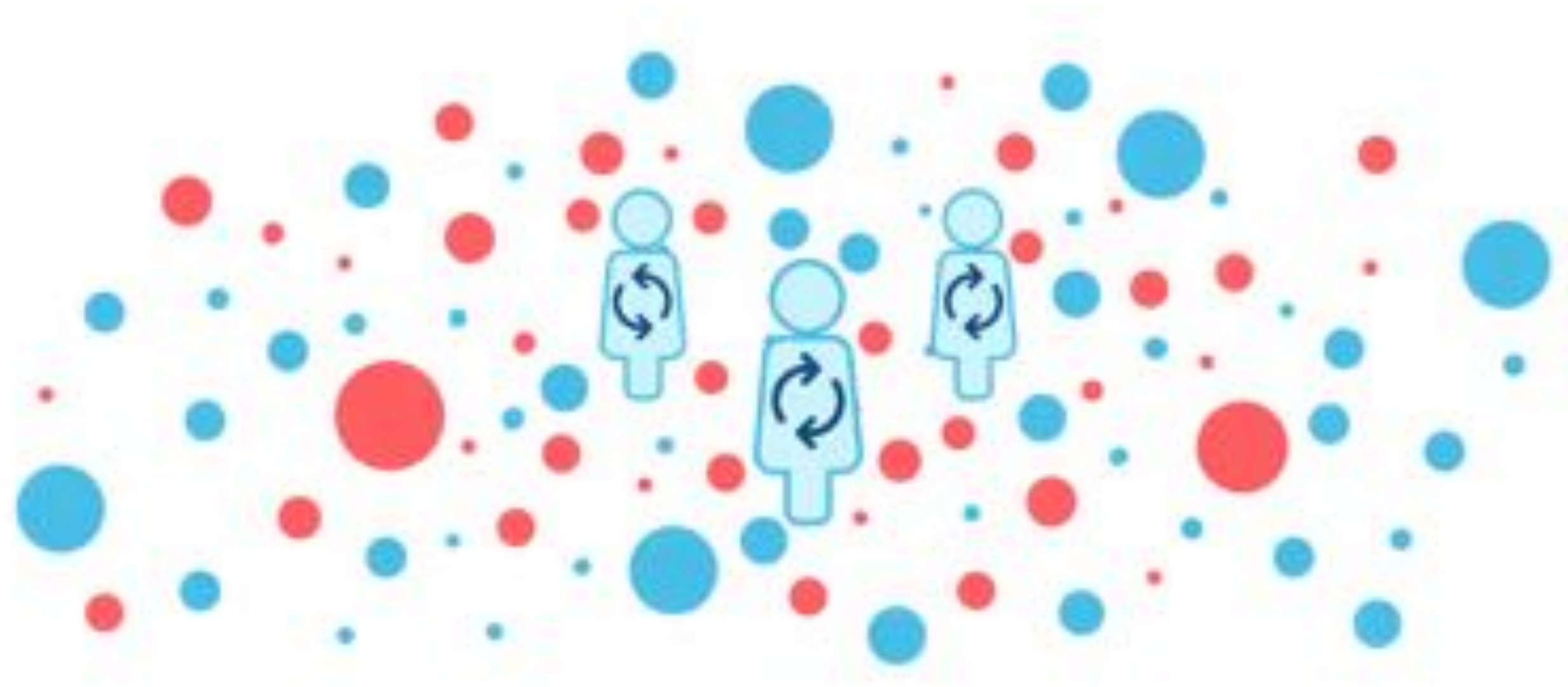
# Transactional Segmentation (WHAT)

Leverage order data from e-commerce sites and goals from lead generation/B2B websites to identify high- and low- valued buyer segments



# Integration and Automation of Segmentation

# Integration and Automation of Segmentation



## Get answers to questions such as:

- How many types of users do I have?
- How do they differ in their interactions?
- Which are my desirable segments?

# Integration and Automation of Segmentation

## **Importance of Integrated Segmentation**

- Provides a holistic view of customer behavior and preferences.
- Enhances precision in targeting by leveraging multiple data points.
- Streamlines marketing strategies for higher efficiency and effectiveness.

## **Automatic Segmentation Tools**

- Utilize AI to analyze and segment users based on various data dimensions.
- Save time and reduce human error in the segmentation process.
- Offer real-time insights and dynamic adjustments to segmentation criteria.





# Data Source/Integration

Build rich personas leveraging first-party data (Google Analytics, Search Console, CRM, ESP) and public sources (social media, voice of customer)



# Visitor Groups

Classify B2B website visitors automatically into business prospects, job seekers, investors, partners/competitors, press and service providers



# Data Enrichment

Augment data for deeper context with 20+ additional data sources and unearth behavioral insights with machine learning



Urbanicity



Media



Movies



Social networks



Websites



Podcasts



Interests



Brands



Communication



Job functions



Industries



YouTube

# Get Rich Industry Specific Insights

Identify variations in key structured attributes specific to your industry/vertical





The image features a dark blue background. A lighter blue circle is positioned on the right side, partially overlapping a vertical line that runs from the top to the bottom of the frame. The text "Next Steps" is centered in the lower half of the image.

Next Steps

# Unpacking Segmentation Replay & Resources

Special Offer All Attendees: 20% off Lifetime Membership  
Discount available until July 1, 2024 with code "segment2024"

JOIN ONLINE COMMUNITY

CHAT WITH JONNY

Below are the resources for the presentation you recently attended via DMWF

We thank you for attending and look forward to helping support you to give your digital transformation and business strategy to grow your business.

Segmentation Resources

Video Replay Presentation



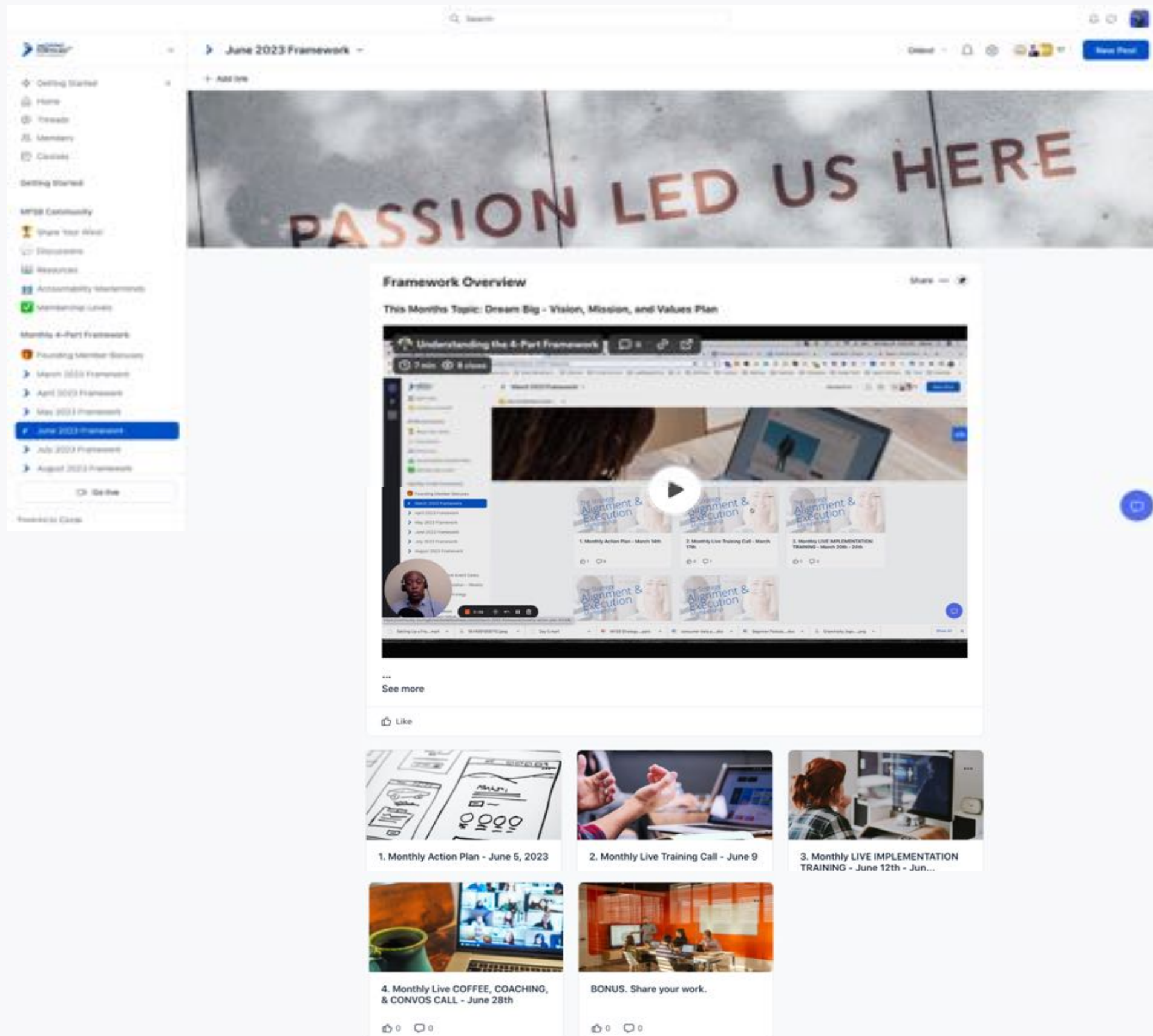
# Replay and Resources



**Or Go to URL Below**

<https://www.movingforwardsmallbusiness.com/unpacking-segmentation-replay/>

# Join the MFSB Community



Use code: **SEGMENT2024**

30% off LIFETIME Membership Until July 1, 2024

<https://www.movingforwardsmallbusiness.com/membership-levels/>



QUESTIONS





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