

RFP Development of an Audience Segmentation

Questions and Answers

Additional Information

Sample: We recognise that those with lived experience and affected communities are a diverse and specific in a nature e.g., specific local community in Kenya, people suffering from a specific health issue in Brazil, to young people who are at risk of developing a mental health issue. This means that agreeing a clear definition of “affected communities/lived experience” from which a sample at a global scale could be recruited from, will be complex and will require much internal consultation and agreement. Therefore, we have taken the decision that those with lived experience and in affected communities will not be included within this audience segmentation project. Future consideration will be given to the best approach(es) to filling the audience insight gaps for these groups outside of this project.

Geography: At the present time, there is no further information on exact countries where we would wish to conduct fieldwork, therefore please base proposals on the information contained within the RFP. Please ensure that your proposal considers how you will effectively address recruitment and fieldwork in the regions as noted in the RFP.

Budget: We recognise that the RFP does not contain all the information required for a final cost to be given for this project, but would request non-binding budget estimates are provided including any assumptions made in arriving at that budget. We have set a budget range of £750,000 - £1m (including VAT) for this project, a budget that we believe adequately reflects both the complexity and geographical coverage that may be required.

Background and Objectives

Q1 Are all communications from Wellcome to Grantees organised from a central London based corporate affairs team or do you divide by challenge area and geography?

A1 Communications to grantees from Wellcome come from Corporate Affairs or on occasions from Strategic Programs based in London.

Q2 Who do you currently engage with and how do you engage with them?

A2 Fig 2 shows the breakdown of audiences and the differing focus for the 4 strategic program areas, research audiences are further broken down in the Attachment accompanying the RFP. There will be a further layer to add to this in terms of geography. We reach, communicate and engage with current audiences through a range of channels from media, social networks, website, emails, e-newsletters, events, direct 1-2-1 communication.

Q3 In your phase 1, we understand you gathered a list of stakeholders and why you want to reach them, but did you do any work exploring current needs, motivations, attitudes?

A3 Phase 1 did not include any work on understanding needs, motivations and attitudes of those audience groups. Although there has been some recent research that may provide some insight on these factors for some audiences, it is not comprehensive nor consistent across all audiences of interest.

Q4 During phase 1 - you mention that you determined 'Why they want to reach them?' – how did they arrive at that?

A4 Phase 1 identified the audiences that Wellcome wish to reach for each of the 4 strategic priority areas. Based on this rapid internal exercise three common purposes for reaching our audiences were identified. Phase 1 determined this common purposes framework via analysing interviews, workshops and internal documentation. In summary purposes include generating impact-oriented and diverse research, building the capacity and infrastructure to deliver impact oriented and diverse research and scaling up our social impact.

Q5 Are the list of subgroups current and potential future audiences?

A5 Yes, they represent both current and prospective audiences.

Q6 Did you do this work internally or use an external agency?

A6 Phase 1 was conducted by an internal project team.

Q7 Thinking about the strategic objectives that the audience segmentation is intended to support Wellcome to deliver over the next five years, which (if any) Corporate Affairs objectives should be prioritised, and why?

A7 Any additional relevant background information on Strategic and Corporate Affairs objectives will be provided at a briefing meeting with the appointed supplier(s).

Q8 As part of the renewed focus on the four strategic programs, have you developed (and would you be able to share) a theory of change that we could use as a framework to guide our approach to and development of the segmentation?

A8 Any additional relevant background information on Strategic and Corporate Affairs objectives will be provided at a briefing meeting with the appointed supplier(s).

Q9 Considering that half of the quant survey is to target potential audiences (as opposed to existing), have you already developed a strategy for increasing your current audience-base? If so, is this focused on increasing audiences within existing categories, or looking to target new categories of audiences that we will need to consider in our response?

A9 Strategies are in development across the strategic programs and more detail outside of those provided in the RFP and attachment will be provided with the selected supplier(s).

Q10 Do you have any existing research on relevant audiences that could inform the sample frame and segmentation development?

A10 There has been research conducted recently with some of the audiences identified, these can be provided to the selected supplier(s) for review.

Q11 Have teams outside of Corporate Affairs inputted into phase one of this project? If yes, are there any specific groups to keep in mind from their perspective?

A11 Phase 1 was developed in consultation with the four strategic programs and the attachment to the RFP contains information on specific audiences of interest to each of the 4 strategic programs.

Q12 Is the organisation using existing segmentations of any audiences or sub-audiences? Will this segmentation replace any previous segmentations, or would it need to co-exist? It would be great to have more information about any current segmentations already in place.

A12 The digital team have developed "researcher" and "influencer" personas how these exist and work with the new segmentation will need to be considered as the project evolves.

Q13 Do you have any previous (last 3 years) research with the audiences you can share with us?

A13 There has been some research conducted in the last 3 years with some of the audiences identified, these can be shared with the selected supplier(s) for review.

Q14 How do you manage your relationships with stakeholders?

A14 Stakeholder relationships are managed in different parts of the organisation, through a combination of direct relationship management and/or "mass" communication channels. The focus of this project is on audiences who we communicate with via mass communication channels and approaches.

Q15 Are you able to share some further information about the overarching purpose of the segmentation?

A15 This project will support anyone in Wellcome whose role involves the planning, development, implementation, and evaluation of communication strategies. This will include those who work in the 4 strategic research programs and associated operational teams, Government Relations and Strategic Partnerships and Corporate Affairs, which includes the brand team, communications, campaigns and insight. Specific use cases would include communicating the Wellcome Corporate Strategy, promotion of funding calls, development of influencing campaigns, brand campaign, recruitment of segments for research projects etc. More detail on use cases can be discussed in consultation with Wellcome's internal reference groups detailed in section 2.6.1 in the RFP.

Outcomes

Q16 Are you open to the prospect that the solution may be more than one segmentation or would this cause challenge embedding within Wellcome?

A 16 We are open to one or more segmentations, whatever is the optimum solution based on data and business requirements.

Q17 We envisage at this stage that some of the dividing factors for audiences in the Global North might be quite different to the Global South making trying to include them in 1 segmentation difficult.

A17 We are open to one or more segmentations, whatever is the optimum solution based on data and business requirements.

Q18 Do you see this as one segmentation? 'regular' people respond differently to professionals, decision-makers, etc. We could imagine a result that is clustered by job role / type of person more than anything else.

A18 We are open to one or more segmentations, whatever is the optimum solution based on data and business requirements.

Q19 Do you envisage one segmentation solution for all key strategic priorities? We could potentially see that each strategic priority could have their own segmentation. Or do you only want to look at this at an overall level only?

A19 We are open to one or more segmentations, whatever is the optimum solution based on data and business requirements.

Q20 One of your objectives mentions improving your engagement with these audiences – What specific activities do you see this helping to inform?

A20 Examples of activities include the development of communication strategies to support funding calls for research grants; the development of campaign strategies to engage those we seek to influence; development of brand strategy.

Q21 Is part of this project working out who the 'right' targets are as well as how to segment them?

A21 Phase 1 identified the relevant target audiences, so the project objective is to define how best to segment those audiences. As part of the outputs, we would look to work with the supplier(s) to map those segments against Wellcome's strategic priorities.

Q22 Would, you want this to link to your current database in anyway? And /or in the future?

A22 Ideally, we will look to link the segmentation back to our CRM system.

Q23 Are there any specific events, activities or internal milestones that the outputs of this need to feed into?

A23 The timetable for delivery of this project as shown in the RFP has been agreed with Wellcome's Executive Leadership team.

Q24 Thinking about the work of the Corporate Affairs team, and the socialisation of the segmentation, what (if any) specific aspects of Wellcome's work is the segmentation intended to support? And are there any practical use considerations to keep in mind in terms of how you envision different teams using the segmentation solution and output?

A24 This project will support anyone in Wellcome whose role involves the planning, development, implementation and evaluation of communication strategies. This will include those who work in the 4 strategic research programs and associated operational teams, Government Relations and Strategic Partnerships and Corporate Affairs, which includes the brand team, communications, campaigns and insight. Specific use cases would include promotion of funding calls, development of influencing campaigns, brand campaign, recruitment of segments for research projects etc. More detail on use cases can be discussed in consultation with Wellcome's internal reference groups detailed in section 2.6.1 in the RFP.

Q25 Can you give more specific examples of Outcomes around what you want audiences to do around the 4 strategic pillars? For example, what bespoke activities would you expect to undertake/ how do you want these audiences to support funding calls/ and how do you expect them to engage around campaigns?

A25 More detail on specific strategic outcomes for each will be given in briefings with the successful supplier (or suppliers). Strategic communications outcomes are developed to support the organisational outcomes as identified in the strategy <https://wellcome.org/who-we-are/strategy#what-do-we-want-to-achieve?-0616>. Outcomes include applying for funding in response to a funding call, supporting a campaign through engaging with content, sharing, advocating, increasing levels of awareness and understanding of Wellcome through a brand campaign.

Q26 Is there a requirement to match back the segmentation solution to your database, or will you use golden questions going forwards to identify segments to your database?

A26 Ideally, we would like to match back the segmentation solution to the database, we are open to the best solutions on how to achieve this.

Q27 Do you envision that this will comprise a cross-cutting segmentation that works across countries? Or do you envision this segmentation will work within each country (and therefore there may be different segments in each country)?

A27 We are open to whatever is the optimum solution based on the data, combining with business requirements.

Q28 Do you see this as being an attitudinal segmentation (i.e., identifying attitudinally similar groups, regardless of their stakeholder 'type')?

A28 We are open to whatever is the optimum solution based on the data, and business needs.

Sample/Methodology

Q29 Do you expect to be able to analyse by group within country? 50 per group might be possible, 50 per group per country is unlikely.

A29 We recognise that sample sizes achieved within audience and/country will be dependent on audience universe within and across the countries and ease of recruitment.

Q30 What recruitment methods are you open to? Some sample providers have pre-screening available which might get to some of these groups; others have specialist panels which use personal screening to ensure respondents are who they say they are; other possibilities include qualitative recruiting. These come with a range of fees, from £5-£10 per respondent through to £100+ per respondent. Are there recruitment approaches you prefer or have used successfully in the past?

A30 We are open to all recruitment methods that will lead to the successful recruitment of respondents that fit our audience profiles.

Q31 Out of the markets highlighted, would you require representation from all of these in the qualitative phase? Might we be in a situation where we could prioritise certain markets or geographical areas?

A31 It is envisaged that we would want to conduct qualitative research in a spread of countries that were important for each audience segment, so ensuring we have a deep understanding of the different cultural and societal settings that apply to each segment.

Q32 If the fieldwork is completed face-to-face, is this something local markets and representatives might want to attend and be engaged in?

A32 Please consider if observation of fieldwork is appropriate to your recommended methodology(ies) and if so, what form of observation you would recommend.

Q33 Some of the identified subgroups e.g., most affected communities/people with lived experiences will have very different needs, attitudes and behaviors to other subgroups and may need a separate way of segmenting them. How do you envisage managing this?

A33 We recognise that those with lived experience and affected communities are a diverse and specific in a nature e.g., specific local community in Kenya, people suffering from a specific health issue in Brazil, to young people who are at risk of developing a mental health issue. This means that agreeing a clear definition of “affected communities/lived experience” from which a sample at a global scale could be recruited from, will be complex and will require much internal consultation and agreement. Therefore, we have taken the decision that those with lived experience and in affected communities will not be included within this audience segmentation project. Future consideration will be given to the best approach(es) to filling the audience insight gaps we have for these groups outside of this project.

Q34 Sample, you mention 50 per subgroup – are you thinking 50 per subgroup per country or 50 in total per subgroup? This will have a significant impact on costs.

A34 We recognise that sample sizes achieved within audience and/country will be dependent on audience universe within and across the countries and ease of recruitment.

Q35 Some of these markets will be difficult to achieve a robust quantitative sample in (are you open creative ideas to deliver on this). Do you have priority markets in mind?

A35 We are open to creative ideas for sampling and methodology.

Q36 We feel that the survey length for the quantitative phase is quite short given the three different priorities? Are you open to recommendations on length?

A36 We are open to recommendations on length, but we are aware of the need to balance length with the need to ensure high engagement and completion rates. We would look to work with the selected supplier(s) to prioritise question areas.

Q37 Are you expending the segmentation to be used primarily at a global, regional or national level, or a mixture – and if so, what mix do you envision?

A37 We envisage being able to use the segmentation at all levels, but the ability to do so will be dependent on the segmentation solution.

Q38 Do you envisage the sample frame initially being comprised of organisations or individuals, or a combination of the two?

A38 We envisage that the sample frame will comprise of a combination of the two.

Q39 Would you be open to considering a questionnaire that is longer than 10-15-minutes, if appropriate, given the range of information necessary to develop an informative segmentation in particular for potential audiences?

A39 We are open to recommendations on length but are aware we of the need to balance length with the need to ensure high engagement and completion rates. We would look to work with the selected supplier(s) to prioritise question areas.

Q40 When considering the advantages / disadvantages of involving an external expert peer reviewer at stage three, are there any recommended peer reviewers that you have worked with previously that we should consider?

A40 At this point we have no specific experts in mind, we would welcome consideration of the value of an expert peer reviewer and any recommendations of experts to be included in proposals.

Q41 The brief mentions a database of existing contacts, based primarily in the UK. Would we have access to the database to conduct the desk research to develop the sample frame?

A41 At this stage it is envisaged that the selected supplier will work with the database owners and project team to extract the information required to develop a meaningful sample frame however, the ways of working on this will need to be fully compliant with Wellcome's data security policies.

Q42 Would you consider a mix of media, parliamentary debates and social media analysis to be used as part of the first phase to inform the sample frame for potential new audiences?

A42 We are open to hearing about all approaches, provided consideration has been given to the risks associated with these approaches.

Q43 Could you share any information about additional details that might be included in your audience contact list, besides contact details? We are interested in how much metadata you will be able to provide, and some of the specific variables that would be available, such as number of applications in last 5 years, type/ value of funding, whether the applications were successful or not, and reasons for success or otherwise.

A43 We hold a range of data on applicants and grant holders (e.g., name, institution, department, location, scheme applied to), successful applicant/non-successful, in differing time periods eg 1 year, 5 years etc. We also have some demographic information (e.g., age, nationality, ethnicity, disability)

Q44 In the Sample Recruitment section of your brief (p6), it says "...the project aims to achieve a minimum of 50 respondents per audience group...". By audience group, do you mean the strategic programs (min 50 in each of DR, CH, ID and MH audiences)?

A44 The sample size of 50 was referring to audience group across all 4 strategic programs however, we recognise that sample sizes achieved within audience and/country will be dependent on audience universe within and across the countries and ease of recruitment.

Q45 In the appendix document, some of the audience sub-groups are quite broad (e.g., "Financial services", "Tech", "Big Tech", "Public"). Could you give a little more detail about the kinds of organisations you have in mind here?

A45 Attachment 1 has these broken down by Wellcome's 4 strategic program area and will relate to organisations who operate or have an interest in these health challenge areas. More detailed information will be given to the selected supplier(s) as part of the briefing process.

Q46 What sources/ how many sources do you expect to be evaluated for stage 1 desk research?

A46 At the moment we don't know of specific secondary sources that exist that will help in sizing audiences and the desk research will need to identify sources.

Q47 What is driving your interest/ need in having an external expert peer review the segmentation? Is this from a category perspective and/or analytical perspective?

A47 The initial thought was an expert in audience segmentation however we are open to thoughts on this and the value of having an expert peer reviewer.

Q48 At what level do you expect to conduct the segmentation - overall, by market, other? Do you require separate ones for different groups?

A48 We expect to conduct the fieldwork that will help generate the segmentation across countries and audiences identified. We are open to one or more segmentations, whatever is the optimum solution based on that data as well as business requirements.

Q49 We note guidance on a minimum of 50 respondents per audience group. Is there guidance on the sample split across the strategic programs and across the geographies identified?

A49 We recognise that sample sizes achieved within audience, strategic program and/country will be dependent on audience universe within and across the countries and ease of recruitment. Final sample quotas will be agreed once all the necessary information from stage 1 and desk research in stage 2 has been completed.

Q50 Regarding your sample contacts, do you have email addresses and / or phone numbers?

A50 We hold email addresses, and for some phone numbers.

Q51 We note that you are able to share contact details for the sample but lack a full and accurate picture. In order for us to recommend appropriate techniques to build more sample, are you able to share more information about: Your current contact database (e.g., in terms of scope, number of contacts, contact details you hold e.g., email, telephone number etc)

A51 We hold 220,000 contacts within the CRM, approximately 140,000 have both email and phone contact information. These contacts include a wide range of different audiences.

Q52 The gaps – do you know where the gaps are in your current sample? Are these typically whole categories, or is it a case of needing to build out from your current sample? Are you able to give us a clear brief about the type of organisation / role of individual etc. to help inform our sample building?

A52 The gaps in our current contacts differ by audience type and by country. With our selected supplier(s) we will work with the project reference groups and others to establish a more detailed picture of the number of contacts we have and possible access routes to new contacts. At this point we are aware that more detailed information will need to be provided to arrive at an accurate cost and exact sampling approach however, we are interested in your suggested approaches to finding sample beyond the use of existing contacts.

Q53 Do you see this as being a statistical segmentation? Or would you consider a set of more qualitatively developed typologies (which could then potentially be quantitatively validated)?

A53 As outlined in the RFP we see this segmentation to be fully delivered through a program combining quantitative and qualitative research methods, we are open to the order in which these occur however, a statistical feel for the incidence of each segment would be useful.

Geography

Q54 Is their solid reason to include a country even if its impact on the data is negligible? Adding countries means more translation, programming etc. If we're not covering significant numbers within a country including it for a handful of respondents doesn't seem to make practical sense.

A54 If reach and engagement to the audiences in a specific country is important to the delivery of our strategic outcomes, then we should look at options to include them in the program of research, whether that be at all stages or at more relevant points.

Q55 How important are country differences? Different countries respond in very different ways. We would usually use a degree of normalisation but that tends to rest on good, matched and solid samples by each country. We might not have this given the sample framework. However, without this we risk ending up with segments influenced unduly by country response patterns.

A55 Through the program of work we need to understand whether country differences are an important point of differentiation within an audience group and between different audience groups.

Q56 Do you want to include all of the countries in the qualitative phase, or do you have priority markets?

A56 It is envisaged that the countries for the qualitative phase will be dependent on the outcomes of stage 2 and 3 and priority countries for Wellcome. See response on geographies for further information on countries of interest

Q57 The brief mentions you may be able to provide a more comprehensive list of countries of interest at the time of the Q&A response. Can you confirm if these have been agreed, and which countries have made it to the final list?

A57 Please base your proposal on the existing information on geographies provided in the RFP (see section 2.1.2)

Q58 We appreciate that markets will have been selected on specific criteria, including availability of funding, individual need as related to the three focus areas, as well as opportunity to create a longer-lasting impact. Can you confirm the rationale for individual market selection to give us an indication of a) likelihood to add/ change priority markets as the project evolves, and b) ensure we are able to cover potential new markets that may require a deeper level of local expertise or change in methodology?

A58 Please base your proposal on the existing information on geographies provided in the RFP (see section 2.1.2). More detail on individual country selection will be given in the briefing meeting with the selected supplier(s).

Q59 If the country selection is still being decided, if we are proposing to work in collaboration with partners in different countries, should the emphasis be on our ways of working / process or on the specific partners in the indicative list of countries?

A59 The emphasis should be on your ways of working/process when working in different countries. Where specific countries have been listed, please include details of partners you would work with if relevant.

Q60 You mention in the tender that you may have more insight into target countries for inclusion in the segmentation at the Q&A stage. Any further details you can share at this stage will help us to be more specific in our response.

A60 Please base your proposal on the existing information on geographies provided in the RFP (see section 2.1.2)

Q61 The brief says on p6 "it is hoped...a more comprehensive list of countries of interest" will be available at the time of the Q&A. Can you confirm the countries we should propose for, and give any guidance on whether all audiences should be covered in all countries?

A61 Please base your proposal on the existing information on geographies provided in the RFP (see section 2.1.2)

Experience

Q62 How important is the agency brand? Are you looking for someone with name recognition in the circles from which the sample is drawn?

A 62 We are looking for a supplier or collaboration of suppliers who have the capacity and capability to deliver this project and can demonstrate experience as outlined in section 2.7 in the RFP.

Q63 Are you looking for someone with suitable 'talking heads' to act as a draw in public spaces?

A63 We are looking for a supplier or collaboration of suppliers who have the capacity and capability to deliver this project and can demonstrate experience as outlined in section 2.7 in the RFP.

Q64 Do you expect to have 'boots on the ground' in significant numbers of the countries involved?

A 64 For a multi-country project we recognise that there are several ways that suppliers can satisfy the project requirement in each country and as such we are open to all recommendations on what may be the most appropriate solution for this project.

Q65 Do you expect local knowledge encompassing each country involved?

A65 For a multi-country project we recognise that there are several ways that suppliers can satisfy the project requirement in each country and as such we are open as to what may be the most appropriate solution for this project.

Delivery

Q66 Overall, how involved will stakeholders wish to be involved? What might this involvement look like? Roughly how many people? As this might impact the immersive side of the qualitative methodology.

A66 We have two internal stakeholder project reference groups as referenced in 2.6.1 in the RFP. It is expected that they will be consulted and informed at various stages throughout the project and if appropriate opportunities arise for them to be immersed in the research methodology, then this may be

offered to them. However, their possible involvement should not dictate the recommendation or adoption of the best research approach to satisfy the project objectives.

Q67 Who are the key stakeholders? You mentioned corporate affairs, but who else will use the outputs from this research?

A67 The key stakeholders for this project are anyone in Wellcome whose role involves the planning, development, implementation and evaluation of communication strategies. This will include those who work in the 4 strategic research programs and associated operational teams, Government Relations and Strategic Partnerships and Corporate Affairs, which includes the brand team, communications, campaigns and insight.

Q68 What are you looking for from a partner?

A68 The main requirements are detailed in section 2.6 in the RFP, but would emphasize that the Wellcome project team would want to form a collaborative and open working partnership with the selected supplier(s).

Q69 Who will be involved in each step from the Wellcome Trust? and how much time are your team willing to give to a project like this?

A69 This is one of Wellcome's major strategic projects and as such we are committed to give the necessary time and input required to ensure its successful delivery. We expect to prepare a detailed project plan for each stage with the selected supplier(s) which will identify who needs to be involved at each stage.

Q70 Do you have a project delivery date in mind?

A70 Please refer to section 2.2 in the RFP.

Q71 What is driving the deadline and the overall timeline? What (if any) flexibility is there in terms of when the final outputs are needed – thinking in particular about testing and refinement of outputs if these will require certain functionality for the team(s)?

A71 The timetable for delivery of this project as shown in the RFP has been agreed with Wellcome's Executive Leadership team. We are committed to ensuring the actionability of this segmentation, therefore if flexibility is required in terms of testing and refining tools that should be built into your recommended timeline with a clear rationale and a likely testing and refining time-period.

Q72 Does Wellcome have fixed points or milestones throughout this project that we should keep in mind when we evaluate the approach and delivery plan?

A72 Please see section 2.2 Fig 3 for the time plan. More key detailed milestones will be developed for each stage of the project with the appointed supplier(s).

Q73 Would Wellcome be opposed to a quicker delivery / timeline?

A73 We would not be opposed to a quicker delivery time but would want to ensure that we did not sacrifice speed at the expense of delivering fully against the objectives

Q74 Does Wellcome expect any breaks during the project?

A74 We are not anticipating any breaks within the program as outlined.

Budget

Q75 Do have any indication of budget, even if it is a range at this stage?

A75 The budget available for this project is in the range £750k - £1m (including VAT)

Q76 What is the estimated budget range for this project?

A76 The budget range for this project is £750,000 - £1m including VAT

Q77 Does this include the cost for conducting and recruiting for the survey?

A77 This budget includes all aspects of the project

Q78 Do you have an idea of budget? Even a range would be ideal so we can tailor the scope (options) accordingly

A78 The budget range for this project is £750,000 - £1m including VAT.

Risks

Q79 What are the biggest challenges to the success of this project?

A79 In a project of this nature we recognise there can be many challenges. We would like you to consider the potential risks and mitigations within your response to the RFP.

Proposals

Q80, you have specified the number of pages we should stick to. Do you have a minimum font size or margin restriction we should adhere to?

A80 Please submit proposals in line with the overall required length, there can be flexibility within sections and the number of pages suggested should be seen as a guide only. There is no defined font size or margins.

Q81 What (if any) scope is there to extend the submission date? With the Easter weekend in the UK there are only 8 working days available from response to clarification questions and proposal submission?

A81 Unfortunately, there is no flexibility in the timeline for submission of RFPs.

Q82 Do you have any preference for the format of our proposal (e.g., Word document, PowerPoint deck etc)?

A82 There is no preference for format of proposal.