



Pearson BTEC
International Level 3 in
Marketing

Specification

First teaching from September 2027

L3

Issue 1

Pearson BTEC International Level 3 Qualifications in Marketing

Specification

First teaching September 2027

First certification from 2029

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About Pearson

We are the world's leading learning company operating in countries all around the world. We provide content, assessment and digital services to students, educational institutions, employers, governments and other partners globally. We are committed to helping equip students with the skills they need to enhance their employability prospects and to succeed in the changing world of work. We believe that wherever learning flourishes so do people.

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VQ000538

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Welcome

With a track record built over 40 years of student success, our BTEC International Level 3 qualifications are recognised internationally by governments, industry and higher education. BTEC International Level 3 qualifications allow students to progress to the workplace – either directly or via study at a higher level. Over 100,000 BTEC students apply to university every year. Their Level 3 BTECs, either on their own or in combination with A Levels, are accepted by UK and international universities, and higher-education institutes for entry to relevant degree programmes.

Why are BTECs so successful?

BTECs embody a fundamentally student-centred approach to the curriculum, with a flexible, unit-based structure and knowledge applied through assignments. They enable the holistic development of the practical, interpersonal and thinking skills required to succeed in higher education and employment.

When creating these BTEC Internationals we focused on the skills and personal attributes needed to navigate the future, and have worked with many higher education providers, professional bodies, colleges and schools to ensure that their needs are met. Employers are looking for future employees with a thorough grounding in the latest industry requirements and work-ready skills such as critical thinking and problem solving. Higher education needs students who have experience of research, extended writing and meeting deadlines.

We have addressed these requirements by:

- Facilitating and guiding the development of transferable skills through the design and delivery of the qualifications, using a holistic and practical framework which is based on recent research into the most critical skills needed to navigate the future. This Transferable Skills framework has been used to embed transferable skills in the qualifications where they naturally occur and also to signpost opportunities for delivery and development as a part of the wider BTEC learning experience.
- Supporting the delivery of Sustainability Education and Digital Skills development naturally through the content design of the qualifications. Mapping is provided for each qualification to identify where the opportunities for teaching and learning exist.
- Updating sector-specific content to ensure it is relevant and future-facing.
- Implementing a consistent approach to assessment to better engage students, make the qualifications more accessible for them and more manageable for centres to deliver.

We are providing a wealth of support, both resources and people, to ensure that students and their teachers have the best possible experience during their course. See *Section 5* for details of the support we offer.

Collaborative development

Students who complete their BTEC International Level 3 qualification in Marketing aim to go on to employment, often via the stepping stone of higher education. It was, therefore, essential that we developed these qualifications in close collaboration with experts from professional bodies, businesses and universities, and with the providers who will be delivering the qualifications. We engaged experts in the development of these qualifications to ensure that the content meets providers' needs and gives learners quality preparation to help them progress. We are grateful to all the university and further-education lecturers, teachers, employers, professional body representatives and other individuals who have generously shared their time and expertise to help us develop these new qualifications.

Employers, professional bodies and higher-education providers that have worked with us include:

- The Chartered Institute of Marketing
- Medhavi Skills University, India
- Kingston University
- National Institute of Food Technology Entrepreneurship & Management (NIFTEM) - Kundli (Haryana) (India).
- Mahatma Gandhi International School.

Universities, professional bodies and businesses have provided letters of support confirming that these qualifications meet their entry requirements. The letters can be viewed on our website: qualifications.pearson.com.

A word to students

Today's BTEC Internationals will require commitment and hard work, as you would expect of the most respected applied learning qualification in the world. You will have to complete a range of units, be organised, take some assessments that we will set and your teachers will mark and undertake practical tasks and assignments. But you can feel proud to achieve a BTEC because, whatever your plans in life – whether you decide to study further or go on to work – your BTEC International will be your passport to success in the next stage of your life. Good luck, and we hope you enjoy your course.

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1 Introduction

Why choose Pearson BTEC International Level 3 Qualifications in Marketing?

We've listened to feedback from all parts of the Marketing subject community, including higher education. We've used this opportunity of curriculum change to redesign qualifications so that they reflect the demands of a truly modern and evolving Marketing environment – qualifications that enable your students to apply themselves and give them the skills to succeed in their chosen pathway.

The units focus on developing knowledge, understanding and practical skills relevant to marketing as applied to the modern world. Key features include hands-on research tasks, planning work, and reflective practice. Assessments are varied and designed to test both technical proficiency and critical thinking. Evidence of achievement can be through written reports, presentations, peer reviews, and/or live demonstrations. Each unit encourages students to apply concepts to real-world scenarios, fostering deeper understanding. Assessment also emphasises communication, planning and evaluation, aligning with higher education and sector expectations.

Total Qualification Time

Pearson specifies a total number of hours that it is estimated students will require to complete and show achievement for the qualification: this is the Total Qualification Time (TQT). Within TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve teachers and assessors in teaching, supervising and invigilating students. Guided learning includes the time required for students to complete internal assessment under supervised conditions.

In addition to guided learning, other required learning directed by teachers or assessors will include private study, preparation for assessment, and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

BTEC Internationals have been designed around the number of hours of guided learning expected. Each unit in the qualification has a GLH value of 60. There is then a total GLH value for the qualification.

Each qualification has a TQT value. This may vary within sectors and across the suite depending on the nature of the units in each qualification and the expected time for other required learning.

The following table shows the qualifications in this sector and their GLH and TQT values.

Qualification title	Size and structure	Summary purpose
Pearson BTEC International Level 3 Certificate in Marketing	180 GLH (30 Credits) (240 TQT) Equivalent in size to 0.5 of an International A Level. Three units of which one is mandatory and assessed by a Pearson Set Assignment. Mandatory content (33%).	The Certificate is for students who want an introduction to the sector through applied learning and for whom an element of Marketing would be complementary. The qualification supports progression to higher education as part of a programme of study that includes other appropriate BTEC International Level 3 qualifications or International A Levels.

Qualification title	Size and structure	Summary purpose
<p>Pearson BTEC International Level 3 Extended Certificate in Marketing</p>	<p>360 GLH (60 Credits) (480 TQT)</p> <p>Equivalent in size to one International A Level.</p> <p>Six units of which three are mandatory, two are assessed by a Pearson Set Assignment. Mandatory content (50%).</p>	<p>The Extended Certificate is for students who are interested in learning about the Marketing industry alongside other fields of study, with a view to progressing to a wide range of higher education courses, not necessarily in Marketing-related subjects. The qualification is designed to be taken as part of a programme of study that includes other appropriate BTEC International Level 3 qualifications or International A Levels.</p>
<p>Pearson BTEC International Level 3 Foundation Diploma in Marketing</p>	<p>540 GLH (90 Credits) (720 TQT)</p> <p>Equivalent in size to 1.5 International A Levels.</p> <p>Nine units of which five are mandatory, three are assessed by a Pearson Set Assignment. Mandatory content (56%).</p>	<p>The Foundation Diploma is for students who want to study Marketing as a one-year, full-time course, or for those wanting to take it alongside another area of complementary or contrasting study as part of a two-year, full-time study programme. The qualification would support progression to higher education if taken as part of a programme of study that included other BTEC International Level 3 qualifications or International A Levels.</p>

Qualification title	Size and structure	Summary purpose
Pearson BTEC International Level 3 Diploma in Marketing	720 GLH (120 Credits) (960 TQT) Equivalent in size to two International A Levels. Twelve units of which seven are mandatory, five are assessed by a Pearson Set Assignment. Mandatory content (58%).	The Diploma is for students who want to study Marketing as the main element alongside another area of complementary or contrasting study as part of a two-year, full-time study programme. The qualification would support progression to higher education if taken as part of a programme of study that included other BTEC International Level 3 qualifications or International A Levels.
Pearson BTEC International Level 3 Extended Diploma in Marketing	1080 GLH (180 Credits) (1200 TQT) Equivalent in size to three International A Levels. Eighteen units of which eleven are mandatory, eight are assessed by a Pearson Set Assignment. Mandatory content (61%).	The Extended Diploma is a full-time course for students who want to study Marketing as the main focus of a two-year, full-time study programme. The qualification would support progression to higher education in its own right. This qualification could also directly lead to employment in Level 3 roles in the Marketing sector or via higher-education Marketing courses.

Structures of the qualifications at a glance

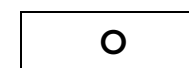
This table shows all the units and the qualifications to which they contribute. The full structure for these Pearson BTEC International Level 3 Qualifications in Marketing is shown in *Section 3 Structure*. **You must refer to the full structure to select units and plan your programme.**

Key

Pearson Set Assignment units are shown in bold



Mandatory units



Optional units

Unit	Unit size (GLH)	Certificate (180 GLH)	Extended Certificate (360 GLH)	Foundation Diploma (540 GLH)	Diploma (720 GLH)	Extended Diploma (1080 GLH)
1 Marketing Principles	60	M	M	M	M	M
2 Marketing Strategies	60	O	M	M	M	M
3 Generating Customer Loyalty	60			M	M	M
4 Branding Products and Services	60	O	O	O	M	M
5 Responsible and Sustainable Marketing	60				M	M
6 Investigate Customer Communications	60	O	O	O	O	M
7 Digital Marketing	60	O	O	O	O	M
8 Artificial Intelligence in Marketing	60					M
9 Develop a Digital Marketing Campaign	60		O	O	O	M
10 Test and Review a Digital Marketing Campaign	60		O	O	O	M
11 Develop Customer Communications	60		O	O	O	M
12 Marketing Skills	60	O	O	O	O	O

Unit	Unit size (GLH)	Certificate (180 GLH)	Extended Certificate (360 GLH)	Foundation Diploma (540 GLH)	Diploma (720 GLH)	Extended Diploma (1080 GLH)
13 Developing a Marketing Campaign and Promotion Campaign	60	○	○	○	○	○
14 Promote an Event and Evaluate the Success	60	○	○	○	○	○
15 Customer Immersive Experience	60			○	○	○
16 Activating a Brand	60			○	○	○
17 Developing Influencer Marketing	60				○	○
18 Market Research	60				○	○
19 Digital Analytics	60					○
20 International Marketing	60					○
21 Managing Customers	60					○
22 Work Experience in Marketing	60					○

Qualification and unit content

Pearson has developed the content of the new BTEC Internationals in collaboration with representatives from higher education and relevant professional bodies. In this way, we have ensured that content is up to date and that it includes the knowledge, understanding, skills and attributes required in the sector.

Centres should ensure that delivery of content is kept up to date. Some of the units within the specification may contain references to legislation, policies, regulations and organisations, which may not be applicable in the country you deliver this qualification in, or which may have gone out-of-date during the lifespan of the specification. In these instances, it is possible to substitute such references with ones that are current and applicable in the country you deliver in, subject to confirmation by your Standards Verifier.

Assessment

Assessment is specifically designed to fit the purpose and objective of the qualification. It includes a range of assessment types and styles suited to vocational qualifications in the sector. All assessment is internal but some mandatory units have extra controls on assessment and are assessed using Pearson Set Assignments.

Pearson Set Assignment (PSA) units

Some units in these qualifications are assessed using a Pearson Set Assignment Brief (PSAB), which is set by Pearson and is marked by teachers. The teachers will make grading decisions based on the requirements and supporting guidance given in the units.

Pearson Set Assignment units are subject to external standards verification processes common to all BTEC units. By setting the assignment for some units, we can ensure that all students take the same set of assessments for a specific unit. For further information on preparing for Pearson Set Assignments, see the *Pearson BTEC International Level 3 Qualifications Supplementary Information* document which is available on our website.

Internally assessed units

All units in these qualifications are internally assessed and subject to external standards verification. In some units, Pearson will set the assessments using Pearson Set Assignments, which are marked by you. In other units, you set and assess the assignments that provide the final summative assessment for each unit, using the examples and support that Pearson provides. Before you assess you will need to become an approved centre, if you are not one already.

You will need to prepare to assess using the guidance in the *Pearson BTEC International Level 3 Qualifications Supplementary Information* document, which is available on our website.

For units where there is no Pearson Set Assignment, you select the most appropriate assessment styles according to the learning set out in the unit. This ensures that students are assessed using a variety of styles to help them develop a broad range of transferable skills. Students could be given opportunities to:

- write up the findings of their own research
- use case studies to explore complex or unfamiliar situations
- carry out projects for which they have choice over the direction and outcomes
- demonstrate practical and technical skills using appropriate tools/processes etc.

For these units, Pearson will provide an Authorised Assignment Brief (AAB) that you can use.

You will make grading decisions based on the requirements and supporting guidance given in the units. Where a student has not achieved their expected level of performance for an assignment, they may be eligible for one resubmission of improved evidence for each assignment submitted if authorised by the Lead Internal Verifier.

To ensure any resubmissions are fairly and consistently implemented for all students, the Lead Internal Verifier can only authorise a resubmission if certain conditions are met. If the Lead Internal Verifier does authorise a resubmission, it must be completed within 15 working days of the student receiving the results of the assessment.

Feedback to students can only be given to clarify areas where they have not achieved expected levels of performance. Students cannot receive any specific guidance or instruction about how to improve work to meet assessment criteria or be given solutions to questions or problems in the tasks.

If a student has still not achieved the targeted pass criteria following the resubmission of improved evidence for an assignment, the Lead Internal Verifier may authorise, under exceptional circumstances, one retake opportunity to meet the required pass criteria. The retake can be of a task or subset of the assignment brief that is of evidence in a new or revised form. The deadline for submission of the retake must fall within the same academic year.

Language of assessment

Assessment of the units for these qualifications will be available in English but can be translated as necessary. A student taking the qualifications may be assessed in sign language where it is permitted for the purpose of reasonable adjustment.

For information on reasonable adjustments see the *Pearson BTEC International Level 3 Qualifications Specification Supplementary Information* document, which is available on our website.

Grading for units and qualifications

Achievement in a qualification requires a demonstration of depth of study in each unit, assured acquisition of a range of practical skills required for progression to higher education, and successful development of transferable skills. Students achieving a qualification will have completed all units.

Units are assessed using a grading scale of Distinction (D), Merit (M), Pass (P) and Unclassified (U). All mandatory and optional units contribute proportionately to the overall qualification grade.

BTEC International qualifications are graded using a scale of P to D*, **or** PP to D*D*, **or** PPP to D*D*D* depending on the size of the qualification. Please see *Section 6* for more details. The relationship between qualification grading scales and unit grades will be subject to regular review as part of Pearson's standards monitoring processes on the basis of student performance and in consultation with key users of the qualification.

Preparing students for the future

Transferable skills

Recent future skills reports have highlighted the growing importance of transferable skills for students to succeed in their careers and lives in this fast-changing world.

Following research and consultation with FE educators and higher education institutions, Pearson has developed a Transferable Skills Framework to facilitate and guide the development of transferable skills through these qualifications. The Framework has four broad skill areas, each with a cluster of transferable skills as shown below:

1. **Managing Yourself:** (1) Taking personal responsibility; (2) Personal strengths and resilience; (3) Career orientation planning; (4) Personal goal setting
2. **Effective Learning:** (1) Managing own learning; (2) Continuous learning; (3) Secondary research skills; (4) Primary research skills
3. **Interpersonal Skills:** (1) Written communications; (2) Verbal and non-verbal communications; (3) Teamwork; (4) Cultural and social intelligence
4. **Solving Problems:** (1) Critical thinking; (2) Problem solving; (3) Creativity and innovation.

Each transferable skill has a set of descriptors that outline what achievement of the skill looks like in practice. Each unit in these qualifications will show whether a transferable skill has been:

1. fully embedded through the design of the teaching and learning content and assessment of the unit. Skills that are embedded are 'naturally occurring' in that they are inherent to the unit content and don't require extension activities to deliver.
2. signposted as an opportunity for delivery and development and would require extension activities to deliver.

Units will show a summary of the transferable skills that have been embedded or signposted and *Appendix 2* shows the descriptors for each skill across all the skill clusters.

More information on the framework, its design and relevance for student progression is available in the *BTEC Transferable Skills Guide for Teachers*. Resources and guidance to support teachers in the delivery and development of these skills will be available in the *Planning and Teaching Guide* for this qualification and through our training offer.

Digital skills

Digital skills are required in every industry as well as in everyday life and, with the acceleration of automation and AI in industry, it is critical for students to understand how digital technologies are relevant and applied in the context of the sector they are studying.

With this in mind, we have used the *Digital Skills Framework* published by the Institute for Apprenticeships and Technical Education (IFATE) as a frame of reference to identify opportunities for the delivery and development of digital skills in this qualification.

This *Digital Skills Framework* has five categories with specific digital characteristics that apply in varying extent across sectors:

1. **Problem Solving** – The use of digital tools to analyse and solve problems
2. **Digital Collaboration and Communication** – Using digital tools to communicate and share information with stakeholders
3. **Transacting Digitally** – Using digital tools to set up accounts and pay for goods/services
4. **Digital Security** – Identify threats and keep digital tools safe
5. **Handling Data Safely and Securely** – Follow correct procedures when handling personal and organisational data.

Opportunities to develop these digital skills are identified where they are relevant and appropriate to a sector, meaning:

- where they naturally occur
- where they add no assessment burden
- where they will enhance a student's skills and knowledge in the sector.

Appendix 3 shows a mapping of the teaching and learning content to the five categories of the framework to show where opportunities to develop these digital skills exist in these qualifications.

Sustainability skills

To help students develop sustainability skills, practices and mindset, we have designed content in these qualifications, aligned to the *UNESCO Sustainable Development Goals* (17 SDGs), that are relevant and appropriate to the sector. The SDGs are the most common point of reference for content that addresses sustainability and provides a useful and pragmatic way of organising this content.

Sustainability knowledge and understanding may be included in the teaching and learning content but not directly assessed. Alternatively, it could be assessed – the approach chosen for each unit is based on the relevance of the sustainability skills, knowledge or understanding to the purpose and scope and scope of the unit.

Appendix 4 shows a mapping of the teaching and learning content to the relevant SDGs to show where sustainability has been included in these qualifications.

2 Qualification purpose

Pearson BTEC International Level 3 Qualifications in Marketing

In this section, you will find information on the purpose of these qualifications and how their design meets that purpose through the qualifications' objectives and structures.

Who are these qualifications for?

The Pearson BTEC International Level 3 qualifications in Marketing are designed either for students in the 16–19 age group, who wish to pursue a career in Marketing via higher education to access graduate entry employment with businesses, or alternatively through junior employment.

The qualifications could be taken alongside a Pearson BTEC International Level 3 qualifications in Creative Digital Media Production, Travel and Tourism, IT, Photography or Graphics, thereby broadening students' potential career options.

Which size qualification to choose?

Choosing the most suitable size of qualification will depend on the student's broader programme of study. For example, a student who wishes to focus solely on Marketing may take the Diploma or Extended Diploma, while a student who selects a smaller qualification, such as the Certificate or Extended Certificate, may choose to combine it with qualifications from other sectors, to support their desired progression. Smaller qualifications are also suitable for students who are in employment and studying part-time.

Qualification structures have been designed to enable a student who starts with the smallest qualification to progress easily to the larger qualifications.

What does these qualifications cover?

The content of these qualifications has been designed to support progression to particular roles in Marketing, either directly into entry-level roles linked to these occupational areas or, more likely, via particular higher-education routes in the particular areas. The qualification content has been designed in consultation with employers, professional bodies and higher-education providers to ensure that the content is appropriate for the progression routes identified.

All students will be required to take mandatory content that is directly relevant to progression routes in all of the identified areas.

In addition, students take optional units that support the progression route identified in the qualification title. For example, students taking the qualification as part of a work-based learning qualification for Customer Service could take units such as:

- Generating Customer Loyalty
- Managing Customers

Students looking to follow an Events Management route could take units such as:

- Activating a Brand
- Promote an Event and Evaluate the Success

Additionally, students could choose units that relate to a number of roles in the sector but which contribute to their understanding of those roles in a vocational context, such as:

- International Marketing
- Work Experience in Marketing

The qualification is aimed at students who are looking to progress to employment in the sector via an apprenticeship and whose aspirations may also be to enter higher education. The qualification is fully mapped to the CIM L3 Foundation Certificate in Professional Marketing. This means that it will be recognised by employers and will support entry into this industry as a marketing executive.

When combined with other Level 3 qualifications, this qualification also offers students the opportunity to progress to a broad range of higher education programmes, including Higher National Diploma and bachelor degrees.

What could these qualifications lead to?

These qualifications support progression to job opportunities in the Marketing sector at a variety of levels. Jobs available in these areas include:

- Social media assistant
- Market research analyst
- Marketing assistant

These qualifications also support students who are following an Extended Diploma. The jobs available to them will be based on their ability in the Marketing and will be supported by their achievement of this qualification.

After achieving this qualification, while students can progress directly to entry-level Marketing roles, it is likely that many will do so via higher study. These qualifications are recognised by higher education institutions worldwide and provides students with opportunities to progress into further and higher study across various areas within the Marketing sector. For example:

- BA (Hons) in Marketing
- BA (Hons) in International Business and Marketing

- BA (Hons) in Digital Marketing
- Pearson BTEC Higher Nationals in Marketing Management for England.

NB: students should always check the entry requirements for degree programmes with the relevant higher education provider.

3 Structure

Qualification structures

The structures for the qualifications in this specification are:

- Pearson BTEC International Level 3 Certificate in Marketing (180 GLH)
- Pearson BTEC International Level 3 Extended Certificate in Marketing (360 GLH)
- Pearson BTEC International Level 3 Foundation Diploma in Marketing (540 GLH)
- Pearson BTEC International Level 3 Diploma in Marketing (720 GLH)
- Pearson BTEC International Level 3 Extended Diploma in Marketing (1080 GLH).

Pearson BTEC International Level 3 Certificate in Marketing (180 GLH)

Students must complete 1 mandatory unit and 2 optional units.

See *Section 6* for rules on qualification awarding.

Mandatory units – students complete and achieve all units

Unit number	Unit title	GLH	Type	How assessed
1	Marketing Principles	60	Mandatory	Set Assignment

Optional units – students complete 2 units

Unit number	Unit title	GLH	Type	How assessed
2	Marketing Strategies	60	Optional	Set Assignment
4	Branding Products and Services	60	Optional	Set Assignment
6	Investigate Customer Communications	60	Optional	Set Assignment
7	Digital Marketing	60	Optional	Set Assignment
12	Marketing Skills	60	Optional	Internal

Unit number	Unit title	GLH	Type	How assessed
13	Developing a Marketing Campaign and Promotion Campaign	60	Optional	Internal
14	Promote an Event and Evaluate the Success	60	Optional	Internal

Pearson BTEC International Level 3 Extended Certificate in Marketing (360 GLH)

Students must complete 2 mandatory units and 4 optional units.

See Section 6 for rules on qualification awarding.

Mandatory units – students complete and achieve all units

Unit number	Unit title	GLH	Type	How assessed
1	Marketing Principles	60	Mandatory	Set Assignment
2	Marketing Strategies	60	Mandatory	Set Assignment

Optional units – students complete 4 units

Unit number	Unit title	GLH	Type	How assessed
4	Branding Products and Services	60	Optional	Set Assignment
6	Investigate Customer Communication	60	Optional	Set Assignment
7	Digital Marketing	60	Optional	Set Assignment
9	Develop a Digital Marketing Campaign	60	Optional	Internal
10	Test and Review a Digital Marketing Campaign	60	Optional	Internal
11	Develop Customer Communications	60	Optional	Internal
12	Marketing Skills	60	Optional	Internal
13	Developing a Marketing Campaign and Promotion Campaign	60	Optional	Internal
14	Promote an Event and Evaluate the Success	60	Optional	Internal

Pearson BTEC International Level 3 Foundation Diploma in Marketing (540 GLH)

Students must complete 3 mandatory units and 6 optional units.

See Section 6 for rules on qualification awarding.

Mandatory units – students complete and achieve all units

Unit number	Unit title	GLH	Type	How assessed
1	Marketing Principles	60	Mandatory	Set Assignment
2	Marketing Strategies	60	Mandatory	Set Assignment
3	Generating Customer Loyalty	60	Mandatory	Set Assignment

Optional units – students complete 6 units

Unit number	Unit title	GLH	Type	How assessed
4	Branding Products and Services	60	Optional	Set Assignment
6	Investigate Customer Communications	60	Optional	Set Assignment
7	Digital Marketing	60	Optional	Set Assignment
9	Develop a Digital Marketing Campaign	60	Optional	Internal
10	Test and Review a Digital Marketing Campaign	60	Optional	Internal
11	Develop Customer Communications	60	Optional	Internal
12	Marketing Skills	60	Optional	Internal
13	Developing a Marketing Campaign and Promotion Campaign	60	Optional	Internal
14	Promote an Event and Evaluate the Success	60	Optional	Internal

Unit number	Unit title	GLH	Type	How assessed
15	Customer Immersive Experience	60	Optional	Internal
16	Activating a Brand	60	Optional	Internal

Pearson BTEC International Level 3 Diploma in Diploma (720 GLH)

Students must complete 5 mandatory units and 7 optional units.

See *Section 6* for rules on qualification awarding.

Mandatory units – students complete and achieve all units

Unit number	Unit title	GLH	Type	How assessed
1	Marketing Principles	60	Mandatory	Set Assignment
2	Marketing Strategies	60	Mandatory	Set Assignment
3	Generating Customer Loyalty	60	Mandatory	Set Assignment
4	Branding Products and Services	60	Mandatory	Set Assignment
5	Responsible and Sustainable Marketing	60	Mandatory	Set Assignment

Optional units – students complete 7 units

Unit number	Unit title	GLH	Type	How assessed
6	Investigate Customer Communications	60	Optional	Set Assignment
7	Digital Marketing	60	Optional	Set Assignment
9	Develop a Digital Marketing Campaign	60	Optional	Internal
10	Test and Review a Digital Marketing Campaign	60	Optional	Internal
11	Develop Customer Communications	60	Optional	Internal
12	Marketing Skills	60	Optional	Internal
13	Developing a Marketing Campaign and Promotion Campaign	60	Optional	Internal

Unit number	Unit title	GLH	Type	How assessed
14	Promote an Event and Evaluate the Success	60	Optional	Internal
15	Customer Immersive Experience	60	Optional	Internal
16	Activating a Brand	60	Optional	Internal
17	Developing Influencer Marketing	60	Optional	Internal
18	Market Research	60	Optional	Internal

Pearson BTEC International Level 3 Extended Diploma in Marketing (1080 GLH)

Students must complete 11 mandatory units and 7 optional units.

See *Section 6* for rules on qualification awarding.

Mandatory units – students complete and achieve all units

Unit number	Unit title	GLH	Type	How assessed
1	Marketing Principles	60	Mandatory	Set Assignment
2	Marketing Strategies	60	Mandatory	Set Assignment
3	Generating Customer Loyalty	60	Mandatory	Set Assignment
4	Branding Products and Services	60	Mandatory	Set Assignment
5	Responsible and Sustainable Marketing	60	Mandatory	Set Assignment
6	Investigate Customer Communications	60	Mandatory	Set Assignment
7	Digital Marketing	60	Mandatory	Set Assignment
8	Artificial Intelligence in Marketing	60	Mandatory	Set Assignment
9	Develop a Digital Marketing Campaign	60	Mandatory	Internal
10	Test and Review a Digital Marketing Campaign	60	Mandatory	Internal
11	Develop Customer Communications	60	Mandatory	Internal

Optional units – students complete 7 units

Unit number	Unit title	GLH	Type	How assessed
12	Marketing Skills	60	Optional	Internal
13	Developing a Marketing Campaign and Promotion Campaign	60	Optional	Internal
14	Promote an Event and Evaluate the Success	60	Optional	Internal
15	Customer Immersive Experience	60	Optional	Internal
16	Activating a Brand	60	Optional	Internal
17	Developing Influencer Marketing	60	Optional	Internal
18	Market Research	60	Optional	Internal
19	Digital Analytics	60	Optional	Internal
20	International Marketing	60	Optional	Internal
21	Managing Customers	60	Optional	Internal
22	Work Experience in Marketing	60	Optional	Internal

Pearson Set Assignment units

This is a summary of the type and availability of Pearson Set Assignment units. For further information on preparing for Pearson Set Assignments, see the *Pearson BTEC International Level 3 Qualifications Supplementary Information* document which is available on our website.

Unit	Type	Availability
Unit 1: Marketing Principles	An assignment set by Pearson and marked by the centre. The advised period is 9 hours.	Bank PSA
Unit 2: Marketing Strategies	An assignment set by Pearson and marked by the centre. The advised period is 9 hours.	Bank PSA
Unit 3: Generating Customer Loyalty	An assignment set by Pearson and marked by the centre. The advised period is 9 hours.	Bank PSA
Unit 4: Branding Products and Services	An assignment set by Pearson and marked by the centre. The advised period is 9 hours.	Bank PSA
Unit 5: Responsible and Sustainable Marketing	An assignment set by Pearson and marked by the centre. The advised period is 9 hours.	Bank PSA
Unit 6: Investigate Customer Communications	An assignment set by Pearson and marked by the centre. The advised period is 9 hours.	Bank PSA
Unit 7: Digital Marketing	An assignment set by Pearson and marked by the centre. The advised period is 9 hours.	Bank PSA
Unit 8: Artificial Intelligence in Marketing	An assignment set by Pearson and marked by the centre. The advised period is 9 hours.	Bank PSA

4 Units

Understanding your units

The units in this specification set out our expectations of assessment in a way that helps you to prepare your students for assessment. The units help you to undertake assessment and quality assurance effectively.

This section explains how the units work. It is important that all teachers, assessors, internal verifiers and other staff responsible for the programme review this section.

Section	Explanation
Unit number	The number is in a sequence in the sector. Numbers may not be sequential for an individual qualification.
Unit title	This is the formal title that we always use and it appears on certificates.
Unit level	All units are at Level 3.
Unit type	This confirms that the unit is internal or assessed using a Pearson Set Assignment. See structure information in <i>Section 3 Structure</i> for full details.
GLH	Units have a Guided Learning Hours (GLH) value of 60. This indicates the numbers of hours of teaching, directed activity and assessment expected. It also shows the weighting of the unit in the final qualification grade.
Unit in brief	A brief formal statement on the content of the unit that is helpful in understanding its role in the qualification. You can use this in summary documents, brochures etc.
Unit introduction	This is designed with students in mind. It indicates why the unit is important, how learning is structured, and how learning might be applied when progressing to employment or higher education.
Learning aims	These help to define the scope, style and depth of learning of the unit. You can see where students should be learning standard requirements ('understand') or where they should be actively researching ('investigate'). You can find out more about the verbs we use in learning aims in <i>Appendix 1</i> .

Section	Explanation
Summary of unit	This helps you to see the main content areas against the learning aims and the structure of the assessment at a glance.
Content	This sets out the required teaching content of the unit. Content is compulsory except where shown as 'e.g.'. Students should be asked to complete summative assessment only after the teaching content for the unit or learning aim(s) has been covered.
Assessment criteria	Each learning aim has Pass and Merit criteria. Each assignment has at least one Distinction criterion. A full glossary of terms used is given in <i>Appendix 1</i> . Distinction criteria represent outstanding performance in the unit. Some criteria require students to draw together learning from across the learning aims.
Transferable skills	This summarises the transferable skills present within the unit. The key helps to identify whether they are signposted but require additional assessment, embedded and achieved on completion or not present in the unit.
Essential information for Pearson Set Assignment Brief (PSAB)	This shows a brief summary of the activities required for the mandatory Pearson Set Assignment Brief. Centres must download and use the mandatory PSAB without alteration or contextualisation.
Essential information for assignments	This section gives you information to support the implementation of assessment. It is important that this is read carefully alongside the assessment criteria, as the information will help with interpretation of the requirements.
Further information for teachers and assessors	This gives you information to support the implementation of assessment. It is important that this is used carefully alongside the assessment criteria and assignment.
Resource requirements	Any specific resource requirements that you need to be able to teach and assess are listed in this section.
Essential information for assessment decisions	This information gives guidance for each learning aim or assignment of the expectations for Pass, Merit and Distinction standard. This section contains examples and essential clarification.

Section	Explanation
Links to other units	This shows you the main relationship between units. This can help you to structure your programme and make best use of materials and resources.

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Unit 1: Marketing Principles

Level: 3

Unit type: Pearson Set Assignment

Guided learning hours: 60

Unit in brief

The unit introduces the principles of marketing and its role in achieving business success. It develops knowledge of key concepts such as the marketing mix, market research and customer needs, providing a foundation for further study or entry-level roles in marketing.

Unit introduction

Marketing is central to the long-term success of all types of organisations as it impacts growth, reputation and revenue. It is important as it builds brand awareness, attracts and retains customers, drives sales and encourages customer loyalty. Effective marketing helps organisations to understand customer preferences, differentiate themselves from competitors and make informed decisions.

In this unit you will learn about the principles of marketing, starting with its purpose, role, and relationship to other business functions to link business success and meeting objectives. You will explore the internal and external influences on the marketing environment and the importance of understanding customer needs. You will examine market research methods and how data supports decision-making. You will explore the 7Ps marketing mix, and how these are analysed alongside the concepts of segmentation, targeting, and positioning. You will also apply these principles to real-world contexts, evaluating market research and campaigns across different market sectors.

This practical approach ensures that students can connect theoretical knowledge with practical applications, enhancing their understanding and skills in marketing. Students will understand the marketing world and make informed decisions that drive organisational success. This unit will help progression to a range of job opportunities in the marketing context, to further study in higher education and to a professional qualification.

Learning aims

In this unit you will:

- A** Apply understanding of marketing when researching and analysing the marketing in a given context
- B** Explore the marketing mix and its application to different market contexts
- C** Explore market research methods and their influence on marketing decisions.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Apply understanding of marketing when researching and analysing the marketing in a given context</p>	<p>A1 Role of marketing A2 Business and organisation aims and marketing objectives A3 Researching the market A4 Appropriateness, validity and reliability of research A5 Marketing environment analysis</p>	
<p>B Explore the marketing mix and its application to different market contexts</p>	<p>B1 Product B2 Price B3 Place B4 Promotion B5 People B6 Process B7 Physical evidence B8 Benefits of a coordinated and synchronised marketing mix B9 The marketing mix in different contexts</p>	<p>This unit is assessed through a Pearson Set Assignment</p>
<p>C Explore market research methods and their influence on marketing decisions</p>	<p>C1 Role of market research methods in helping to meet marketing objectives and inform decision making C2 Using primary research methods in a start-up business C3 Using secondary research methods in a start-up business</p>	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Apply understanding of marketing when researching and analysing the market in a given context

A1 Role of Marketing

Students will develop an understanding of the role of marketing and its application and importance for exchanges between organisations, customers and suppliers of different organisations.

- Role of marketing as a management process:
 - identifying target markets, customers and their needs, expectations and preferences
 - analysing factors that influence customer purchasing, use and engagement decisions
 - assessing competition
 - evaluating marketing practices
 - developing communication strategies and materials
 - anticipating and stimulating demand or allegiance.
- Importance of marketing for exchanges between organisations, customers and suppliers:
 - promoting and positioning products (goods or services)
 - linking organisation and customer, supporting customers
 - linking marketing and other functions
 - supporting the supply chain
 - providing information internally
 - building and maintaining reputation
 - building relationships with customers
 - maintaining relevance.
- Market type:
 - business to consumer (B2C)
 - business to business (B2B)
 - for-profit organisations
 - not-for-profit organisations
 - social enterprises
 - niche and mass markets.

- Market reach:
 - the total number of individuals within a specific target market that an organisation can connect with through their marketing efforts.

A2 Business and organisation aims and marketing objectives

Students will understand the importance of marketing organisations meeting marketing objectives to achieve the overall aim(s) of the organisation.

- Business/organisation aims:
 - for-profit: to break even, to survive, to be competitive, to have loyal customers/increase customer retention, to make/maximise profits, to maximise return on investment
 - social enterprises and not-for-profit: to raise funds/accept donations to support local and/or national causes, to support social, environmental or cultural initiatives, to provide for the needs of society.
- Marketing objectives based on research:
 - research on competitors, sales, profit and forecasts
 - SMART (specific, measurable, achievable, relevant and time-bound) targets e.g. customer satisfaction, maintain/increase sales/market share, maintain/increase revenue, build/increase brand awareness and loyalty, develop/launch new goods and services, customer retention, acquire new customers, enter new markets, enhance customer relationships, understand the wants, needs and aspirations of customers, gain an advantage over competitors, engage stakeholders, change buying behaviour, encourage digital engagement.

A3 Researching the market

Students will learn that market research involves gathering and analysing information about customers, competitors and the business environment, using both primary and secondary methods to support marketing decisions and objectives.

- Market research: collecting, analysing and interpreting information on the size and structure of the market, its customers, competitors and the business environment.
- Role of market research:
 - understanding customer needs, preferences and behaviour
 - determining desirability of products (goods and services)
 - investigating customer perception and brand/advertising awareness
 - investigating customer experience and satisfaction
 - determining buying trends
 - helping new product and/or service development
 - investigating feasibility of entry into new markets
 - meeting marketing objectives.

- Secondary research: summary, collation and synthesis of existing research, e.g.
 - internal: data on customers, loyalty schemes, electronic point of sale/sales records, website monitoring, financial/accounting records, customer satisfaction surveys
 - external: e.g. external company accounts and annual reports, government reports and statistics, university research, information from data companies and specialist market research agencies, trade journals and media sources.
- Primary research – gathered first-hand directly at the source e.g.
 - surveys, interviews, questionnaires, polls
 - direct observation, visits and mystery shopping
 - e-marketing e.g. online surveys, questionnaires, focus groups and digital communities, social media, web analytics, data mining and Big Data analysis
 - tests and trials.
- Collection of quantitative (numerical) and qualitative (descriptive) data.

A4 Appropriateness, validity and reliability of research

Students define how to judge the quality of market research by assessing its appropriateness, reliability, and validity.

- Judging the quality of market research:
 - appropriateness: relevance to business aims and marketing objectives, target market and the decision it aims to inform
 - reliability: consistency or repeatability of results
 - validity: based on accurate and current evidence.

A5 Marketing environment analysis

Students will learn about the three main types of marketing environment – macro, micro and internal – and describes key analytical tools used to assess these environments, including PESTEL, SWOT, Ansoff Matrix, Boston Matrix, market mapping, competitor analysis and Porter's Five Forces.

- Macro environment: political, economic, social, technological, environmental, legal/regulatory forces.
- Micro environment: customers, competitors, suppliers, intermediaries, the public.
- Internal environment: financial and non-financial resources, people and their skills, equipment, e.g. systems, processes, digital capabilities.
- Situational analyses used to assess the marketing environment:
 - PESTEL (political, economic, social, technological, environmental, legal/regulatory) analysis of external factors affecting marketing
 - SWOT (strengths, weaknesses, opportunities and threats) analysis of internal and external factors affecting marketing:
 - strengths and weaknesses: internal analysis of production capacity, branding, product portfolio, staff skills, access to materials and suppliers

- opportunities and threats: external analysis of market demand, changing technology, competitor strength
- o Ansoff Matrix: to determine product and market growth strategies
- o Boston Matrix: to classify products within the product portfolio into four distinct groups – stars, cash cows, question marks and dogs
- o market mapping: to identify where there are ‘gaps’ in the market
- o competitor analysis: to assess the strengths and weaknesses of competitors, to identify opportunities for improvement within an organisation
- o Porter’s Five Forces: to analyse the competitiveness of an industry and assess its profitability and attractiveness.

Learning aim B: Explore the marketing mix and its application to different market contexts

Students will learn about the extended Marketing Mix and understand how to apply it to different markets.

B1 Product

Students will understand the benefits, features and functions of tangible and intangible products, including aspects such as design, technology, aesthetics, unique selling points, branding, core and augmented products, product portfolios, and the stages of the product life cycle.

- Benefits, features and functions of tangible (goods) and intangible (service) products:
 - o design: functionality, ergonomics, usability, experience
 - o technology: interface, supportive technology, peripheral technology
 - o aesthetics: visual appearance, style, colour scheme, packaging
 - o unique selling point (USP)
 - o branding: brand personality and brand image.
- Core product: satisfies an essential need, is the main problem-solving benefit or value for the customer.
- Augmented product: extras that add value, make it stand out from the competition and build loyalty, e.g. delivery, warranty, customer service, installation, tech support, after-sales service.
- Product portfolio: comprises all products and services of an organisation.
- Product life cycle stages: development, introduction, growth, maturity, decline.

B2 Price

Students will understand the factors that determine the most appropriate pricing strategy.

- Factors that determine the most appropriate pricing strategy for a situation:
 - unique selling points (USPs)
 - product differentiation: design, performance, branding
 - amount of competition, physical and digital
 - stage in the product life cycle
 - costs and the need to make a profit.
- Pricing strategies: penetration, skimming, competitor-based, cost-plus, premium, psychological.
- Relationship between cost, price and value.

B3 Place

Students will understand the different ways products can be distributed to customers.

- Physical location (bricks and mortar).
- Digital sales (clicks) including electronic commerce (e-commerce), mobile commerce (m-commerce) and other digital methods.
- Physical location and digital sales (bricks and clicks).
- The means of distributing product to that place.

B4 Promotion

Students will understand various traditional and digital marketing methods and list key factors to consider when choosing a marketing channel.

- Traditional and digital marketing methods:
 - print, online, mobile, broadcast, social media marketing, out-of-home, ambient, guerrilla, product placement, podcasts, audio advertising, video, pay-per-click, public service announcements.
- Personal selling:
 - face-to-face, email, telephone, video, sales presentations, trade shows, exhibitions, event marketing.
- Direct marketing:
 - telephone calls, SMS (texts), in-person promotions, catalogues, email, flyers, leaflets, catalogues, store magazines, direct mail, online and social media.
- Sales promotions:
 - discounts, coupons, competitions, buy one get one free, early bird offers, free gifts, free delivery, point-of-sales promotions in retail outlets, e.g. special displays, demonstrations, tastings.

- Public relations (PR) and online public relations (OPR):
 - news conferences, press releases, sponsorships, celebrity endorsement, events, exhibitions, brochures, newsletters, annual reports, webpages.
- Above and below the line advertising:
 - above the line, e.g. TV, radio, cinema, press, pay-per-click
 - below the line, e.g. sales promotions, direct marketing, mailshots, email newsletters, sponsorship, PR and OPR, press features, celebrity endorsements, merchandising, trade fairs, telesales and personal selling.
- Push and pull marketing:
 - push: puts product in front of customers using direct promotion, e.g. trade shows, direct selling, point-of-sale displays, email blasts, in-store promotions
 - pull: builds awareness and generates demand, brings customers to the organisation, using e.g. blogs, videos, social media, loyalty programmes, TV commercials, influencer marketing.
- Multichannel marketing: using a range of online and offline methods.
- Factors to consider when deciding on a marketing channel:
 - alignment with organisational objectives
 - appropriateness for product and stage of the product lifecycle
 - speed/ease of reaching target market
 - accessibility of information and contents of message
 - cost/budgetary constraints
 - competitors' activities
 - brand image and development
 - measurability of marketing success.

B5 People

Students will understand the qualities that people involved in delivering the product must have:

- People involved in delivering the product to the customer, e.g. employees, sales and delivery staff and customer service representatives. Employees recruited must be suited to the role, trained, motivated and able to give consistent and reliable customer service, motivated to exceed customer expectations and buy into the brand concept.

B6 Process

Students will understand the key elements in delivering products to customers.

- Processes for handling orders.
- Methods of delivery.
- Customer service process.

B7 Physical evidence

Students will understand the tangible elements to a product and the physical presentation of the environment.

- Tangible elements related to the product: e.g. signage, printed materials, packaging, displays, staff uniforms.
- Physical presentation of the environment: e.g. ambience, mood, sound, sight, smell, taste, touch, online and digital media.

B8 Benefits of a coordinated and synchronised marketing mix

Students will understand the benefits of coordinated and synchronised marketing mix.

- Organisational focus.
- Maximised synergy.
- Budget economies.
- Clear brand identity and positioning.
- Competitive advantage.

B9 The marketing mix in different contexts

Students will understand how different types of products and services require distinct marketing approaches.

- Durable and non-durable products:
 - durable products: importance of service and guarantees/warranties, finance packages for purchase
 - non-durable products and fast-moving consumer goods: importance of price and place, mass promotion, recognising the customer and consumer.
- Services: importance of people, process, physical environment and service quality.
- Business to consumer (B2C): importance of product and brand.
- Business to business (B2B): importance of price and negotiation, personal selling and trade promotion, relationships and service.
- Social enterprises and not-for-profit: importance of ideas and services, direct channels, opportunity cost, emphasis on public relations.
- Impact of digital technology across the mix: instant communication, increased amounts of data, encouragement of innovation, broader customer base, price transparency.

Learning aim C: Explore market research methods and their influence on marketing decisions [EL - SRS] [EL - PRS]

C1 Role of market research methods in helping to meet marketing objectives and inform decision making

Students will understand how market research methods help to meet marketing objectives and inform decision making.

- Role of primary research for a start-up business, e.g. understanding customer needs and wants, developing products, identifying target market/market segment, testing marketing messages/campaigns, evaluating competitor strengths and weaknesses, monitoring customer satisfaction/loyalty.
- Role of secondary research for a start-up business, e.g. understanding market size, evaluating market conditions, identifying consumer trends and behaviours, analysing competitor strategies and position.

C2 Using primary research methods in a start-up business

Students will understand how primary research can be conducted in a start-up business.

- Primary research methods including:
 - surveys/interviews/questionnaires/polls:
 - use e.g. to measure customer satisfaction, customer needs, customer reactions, to identify trends
 - limitations e.g. poor design, vague/leading questions, sampling limitations, misinterpretation of questions by participants, biased/inaccurate/untruthful responses from participants
 - focus groups:
 - use e.g. to test new products, packaging, branding or opinions on a product/marketing campaign
 - limitations e.g. attendee knowledge and appropriateness, small group size, moderator influence, groupthink and peer pressure, cost, time
 - observations and mystery shopping:
 - use e.g. to understand buying habits, impact of displays, in-store experiences
 - limitations e.g. personal bias of observer, time and cost of observation activity, privacy concerns.

C3 Using secondary research methods in a start-up business

Students will understand how secondary research can be conducted in a start-up business.

- Secondary research methods including:
 - government reports:
 - use, e.g. to supply official statistics and data on market size, population trends and economic conditions
 - limitations, e.g. outdated information, technical jargon, coverage of broad topics

- company reports, financial statements and press releases:
 - use e.g. to analyse competitor strategy and performance
 - limitations e.g. bias, outdated and selective information, technical language
- media sources:
 - use e.g. to monitor current events in the market, customer thoughts and feelings
 - limitations e.g. bias, lack of depth and detail, outdated or inaccurate information, non-disclosure of original data sources
- social media and digital communities:
 - use e.g. to observe customer opinions, brand reputation, trends
 - limitations e.g. bias, lack of representation of the broader population, misinformation from participants.

Assessment criteria

Learning aim A: Apply understanding of marketing when researching and analysing the market in a given context

Pass	Merit	Distinction
<p>A.P1 Explain the role of marketing in meeting business aims and marketing objectives in a given context.</p> <p>A.P2 Research and explain the features of a market for a given context.</p>	<p>A.M1 Assess the role and importance of marketing in meeting business aims and marketing objectives, using research to analyse the market in a given context.</p>	<p>A.D1 Evaluate the outcomes of market research undertaken, considering the role and importance of marketing in meeting business aims and marketing objectives in a given context.</p>

Learning aim B: Explore the marketing mix and its application to different market contexts

Learning aim C: Explore market research methods and their influence on marketing decisions

Pass	Merit	Distinction
<p>B.P3 Develop a marketing strategy for a given context</p> <p>B.P4 Explain decisions made in the marketing strategy for a given context.</p>	<p>B.M2 Assess decisions made in the marketing strategy for a given context.</p>	<p>BC.D2 Justify decisions made in the marketing strategy for a given context.</p> <p>BC.D3 Justify the use of selected market research methods in helping to meet marketing objectives and inform supported decision making for a start-up business.</p>
<p>C.P5 Explain market research methods used by a selected start-up business to meet marketing objectives. [EL – CL]</p>	<p>C.M3 Assess the appropriateness of different market research methods in helping to meet marketing objectives and inform decision making for a start-up business.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL ✓	IS – V&NC	SP – PS
MY – COP	EL – SRS *	IS – T	SP – C&I
MY – PGS	EL – PRS *	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for Pearson Set Assignment (PSA)

Pearson sets the assignment for the assessment of this unit.

The PSA will take 9 hours to complete.

The PSA will be marked by centres and verified by Pearson.

The PSA will be valid for the lifetime of this qualification.

Assessing the PSA

You will make assessment decisions for the PSA using the assessment criteria provided.

The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on PSAs. There is also further information on our website.

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Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must present a comprehensive evaluation that consider the strengths and weaknesses of the market research undertaken. Students will critically examine the relevance and significance of the role of marketing. They will make connections between the role of marketing and its application and importance for exchanges between organisations, customers and suppliers of different organisations. They will draw on a wide range of information from the given context and come to a supported conclusion using judgements that demonstrate an understanding of the relationship between marketing and business success.

Students must demonstrate a comprehensive and well-structured approach to market research, collecting data that is both wide-ranging and carefully chosen for its relevance. The methods and sources used are justified, showing a critical approach to the process. The analysis is detailed, coherent, and insightful, exploring interconnections between different findings such as the relationship between consumer behaviour, competitor activity, and market opportunities. Conclusions demonstrate an interpretation of the evidence. Judgements are evaluative, considering the appropriateness, reliability and validity of the data and the limitations of their research, and are supported by reasoning that shows how market analysis can shape strategic marketing decisions.

For merit standard, students must present a thoughtful and organised assessment of how marketing contributes to meeting business aims and marketing objectives and the importance of marketing for exchanges between organisations, customers and suppliers in a given context. Their response will demonstrate a clear understanding of the factors most critical to success, such as target market alignment and product positioning. Students will support their analysis with relevant examples, explaining how each factor contributes to the achievement of business aims and marketing objectives.

Students must be able to undertake focused and organised research, drawing on a range of primary and secondary sources that are clearly relevant to the given context. The research is detailed, showing an awareness of different aspects of the market. The analysis moves beyond description to provide developed reasoning, highlighting patterns, relationships or trends within the data and linking these to the business context. The student shows some understanding of how the findings might influence marketing decisions.

For pass standard, students must show knowledge and understanding of the role and importance of marketing in achieving business aims and marketing objectives within a given context. Their work will be supported by concrete examples illustrating how marketing facilitates exchanges between organisations, customers, and suppliers. The explanations will be straightforward, focusing on basic concepts such as identifying customer needs, promoting products (goods or services), and facilitating transactions. While the response may be mostly descriptive, students will demonstrate a foundational grasp of how marketing activities align with business aims and contribute to the overall functioning of the organisation. Students must collect relevant information about a given market through primary and secondary research. The findings may be limited in scope or depth, but they will demonstrate some understanding of basic market features such as customer groups, competitors, or general trends. The explanation tends to be descriptive, often restating facts without drawing out their significance, and, while the research is applied to the given context, the links are basic. The student may highlight what the research shows, but without much consideration of the appropriateness, reliability or validity of the data.

Learning aims B and C

For distinction standard, students must develop a marketing strategy that shows a comprehensive and evaluative understanding of the marketing mix. They can apply the mix in a sophisticated way to different market contexts, demonstrating how businesses adapt strategies across products, services or segments. Their work is detailed and interconnected, showing how the elements of the mix reinforce or impact on each other in shaping marketing outcomes. Students justify decisions made in the marketing strategy, assessing the effectiveness of the mix in given contexts and considering both strengths and limitations. Their conclusions are well-supported with clear justification, showing insight into how businesses make strategic marketing decisions through their use of the marketing mix.

Students must also provide a comprehensive and evaluative account of market research methods and how they help to meet marketing objectives and inform supported decision making for a start-up business. They select and justify appropriate methods with reference to a start-up business and show clear understanding of why certain approaches are more suitable than others. Their work demonstrates insight into how research findings directly influence strategic choices, linking customer behaviour, competitor activity, and market opportunities. Students evaluate the effectiveness, validity and limitations of the research methods used. Their judgements are well supported and balanced, with clear justification of how and why research evidence shapes business decisions.

For merit standard, students must be able to develop a marketing strategy that demonstrates a clear and reasoned application of the marketing mix to different contexts. The work shows a strong understanding of how businesses adapt the mix in response to different markets, customer needs, or competitive pressures. They are able to explain the relationships between the elements of the mix and the business context. Decisions made in the marketing strategy are assessed, with the learner drawing connections between how

the mix is designed and the outcomes it produces. There is some recognition of effectiveness, and the learner weighs up the appropriateness of the marketing mix in the chosen examples.

Students must also assess the appropriateness of a range of market research methods and apply these clearly to a start-up business. Their work demonstrates how different methods can generate useful insights, and they begin to consider issues of suitability and effectiveness in relation to particular marketing decisions. The assessment shows how research findings shape business choices, for example in relation to product design, pricing or promotion. There is a strong connection between the methods used and the outcomes they produce, and the learner demonstrates the ability to discuss the advantages and disadvantages of different approaches for a start-up business.

For pass standard, students must be able to develop a marketing strategy that shows knowledge of the marketing mix and identifies how its elements are used by businesses. Their work will demonstrate that they understand what each of the four Ps (or seven Ps, depending on context) means and they can explain, in a straightforward way, how a business applies each of them. The application to market contexts is present but limited, often focusing on a single example or offering fairly general points. The explanation is basic and largely descriptive, with little evidence of insight into why particular elements of the mix are used in a certain way.

Students must also be able to show a basic understanding of different market research methods, both primary and secondary, and give simple descriptions of how they are carried out. They will be able to identify how research findings might be used to support marketing decisions, but the application is limited and mainly descriptive. The work often focuses on outlining what research is and providing general statements about its influence on decisions, without making clear links to real business situations or evaluating why certain methods are more or less effective for a start-up business.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 3: Generating Customer Loyalty
- Unit 6: Investigating Customer Communications
- Unit 9: Developing a Digital Marketing Campaign
- Unit 10: Test and Review a Digital Marketing Campaign
- Unit 18: Market Research
- Unit 22: Work Experience in Marketing.

Unit 2: Marketing Strategies

Level: 3

Unit type: Pearson Set Assignment

Guided learning hours: 60

Unit in brief

Students develop an understanding of how businesses segment markets, identify target audiences and design effective marketing strategies. They will explore the use of segmentation, targeting and positioning to meet customer needs and achieve business aims.

Unit introduction

Understanding customers is at the heart of successful marketing, and this begins with effective market segmentation. Businesses operate in highly competitive and dynamic environments where they must identify distinct customer groups and tailor their approaches to meet varying needs, preferences, and behaviours. By dividing markets into segments, organisations are able to develop more targeted products (goods and services), communicate more effectively, and gain an advantage over their competitors.

In this unit you will explore the principles and practices of market segmentation and how these are applied in real business contexts. You will examine the different ways in which markets can be segmented, such as by demographics, geography, lifestyle, or buying behaviour, and learn how segmentation data is used to inform marketing strategies. You will also learn the importance of choosing the right target market and positioning products to appeal to that audience.

Through studying this unit, you will develop the skills to research, analyse and evaluate segmentation approaches and their effectiveness in shaping marketing strategies. You will explore how organisations use segmentation to make decisions about the marketing mix and how strategies differ across products, industries and market conditions. This unit will help progression to a range of job opportunities in the marketing context, to further study in higher education and to a professional qualification.

Learning aims

In this unit you will:

- A** Explore market segmentation and the importance of identifying the target market
- B** Examine positioning and differentiation strategies in marketing
- C** Explore the development and implementation of marketing strategies to achieve business aims.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Explore market segmentation and the importance of identifying the target market</p>	<p>A1 Market segmentation A2 Segmentation process A3 Benefits of market segmentation A4 Challenges and limitations of market segmentation A5 Understanding target markets A6 Application in marketing strategy</p>	<p>This unit is assessed through a Pearson Set Assignment</p>
<p>B Examine positioning and differentiation strategies in marketing</p>	<p>B1 Positioning strategies B2 Concept of differentiation B3 Differentiation strategies B4 Tools and frameworks</p>	
<p>C Explore the development and implementation of marketing strategies to achieve business aims</p>	<p>C1 Purpose of marketing strategies C2 Development of marketing strategies C3 Implementation of marketing strategies C4 Monitoring and control</p>	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Explore market segmentation and the importance of identifying the target market [SP - CT]

A1 Market segmentation

- Market segmentation: dividing the existing customer base of a business into smaller groups based on shared characteristics, to better understand their needs and preferences.
- Segmentation type: demographic, geographic, psychographic, behavioural.
- Segmentation variables: characteristics used to divide a broad market into smaller, more manageable groups or segments with similar needs and characteristics:
 - demographic variables: age, race, religion, gender, family size, ethnicity, income, education level, disability, socio-economic group
 - geographic variables: physical location, climate, region, population density
 - psychographic variables: social class, attitudes, lifestyle, values and personality characteristics
 - behavioural variables: spending, consumption, rate of usage, loyalty status, desired benefits.
- Industry perspectives: careful consideration of internal and external factors as well as traditional segmentation variables, dynamic process that is continuously changing, importance in achieving more targeted communication, efficient resource allocation, improved customer satisfaction.

A2 Segmentation process

- Define the current market.
- Identify segmentation type and variable.
- Segment the market ensuring segments are:
 - measurable: size is quantifiable
 - accessible: can be reached through marketing
 - substantial: large and profitable enough
 - differentiable: different from other segments
 - actionable: can be used to create targeted strategies.

- Analyse and evaluate segment suitability:
 - size and growth rate
 - competition
 - profitability
 - strategic fit with brand.
- Decide which segment to focus marketing efforts on.
- Test the segment.

A3 Benefits of market segmentation

- Benefits of market segmentation:
 - targeted marketing
 - improved customer experience and satisfaction
 - competitive advantage
 - effective use of resources
 - innovation and product development
 - improved profitability.

A4 Challenges and limitations of segmenting the market

- Key challenges and limitations:
 - increased research costs – detailed research and data analysis is required
 - difficulty in obtaining reliable and current data – poor-quality or outdated data can lead to ineffective segmentation and misaligned marketing strategies
 - increased marketing costs – each segment may need a different marketing mix
 - risk of making generalisations, assumptions or stereotyping
 - over-segmentation – targeting too narrow a group may increase production costs, limit market potential and reduce profitability
 - putting limits on reach/missing broader market opportunities
 - misidentification of target market – incorrect assumptions about customer needs can result in wasted resources and poor marketing outcomes
 - market saturation – highly competitive segments may be difficult to penetrate without significant investment
 - political and legal constraints – legislation (e.g. data protection rules) may restrict how businesses collect data or communicate with segments.

A5 Understanding target markets

- Market characteristics:
 - market size and scope
 - market structure
 - customer needs and preferences
 - buying trends and behaviours.
- Target market: the specific group of consumers a business aims to reach with its products (goods and services) and marketing efforts.
- Importance of target markets:
 - helps focus marketing efforts
 - improves product – market fit
 - increases return on investment by reducing wasted advertising
 - supports better pricing and positioning strategies.
- Techniques for identifying target markets:
 - researching the market to gather data on customers, competitors, market trends, consumer behaviours and preferences
 - secondary research using e.g. market reports, industry reports, competitor websites, government publications:
 - to understand market trends
 - to understand seasonal, technological, or cultural shifts
 - to predict future demand
 - to identify who competitors are targeting
 - to understand gaps or opportunities in the market.
- Primary research e.g. surveys, interviews, focus groups, observations, online analytics:
 - to gather specific insights on customers.
- Judging the quality of market research:
 - appropriateness: relevant to business aims and marketing objectives, target market and the decision it aims to inform
 - reliability: consistency or repeatability of results.
 - validity: based on accurate and current evidence.
- Issues of failing the research the market:
 - targeting the wrong audience
 - wasting marketing budget
 - creating unwanted products
 - failing to compete.

A6 Application in marketing strategy

- Purpose of evaluating target markets:
 - to determine whether a target market is suitable for a specific product or marketing campaign
 - to assess the potential for profitability, growth and strategic alignment.
- Key target market evaluation techniques:
 - market size and structure analysis: to understand the demographic and behavioural characteristics of the segment
 - trend analysis: to explore current and emerging trends in consumer behaviour, technology, and economic conditions
 - competitor analysis: to assess their strengths, weaknesses, and market share
 - situational analyses used to assess the marketing environment
 - SWOT (strengths, weaknesses, opportunities and threats analysis to analyse the internal strengths and weaknesses of the business in relation to the target market
 - PESTEL (political, economic, social, technological, environmental, legal/regulatory) analysis to analyse external factors that may impact the market
 - customer needs and wants analysis: to explore price sensitivity, product features, and preferred communication channels.
- Matching marketing objectives, e.g. increase market share, increase brand awareness, maintain/increase customer satisfaction, maintain/increase sales/market share, maintain/increase revenue, build/increase brand awareness and loyalty.
- Strategic approaches:
 - mass marketing versus niche marketing:
 - mass marketing – same strategy for all segments
 - niche marketing – focus on one segment
 - differentiated versus undifferentiated strategies
 - differentiated marketing – different strategies for each segment
 - undifferentiated marketing – same strategy for each segment.
- Application of segmentation in marketing strategy: informs product development, pricing strategies, promotional messaging, distribution channels.
- Application techniques:
 - SWOT and PESTEL analysis to inform strategy.
 - marketing mix (7Ps) tailored to segments.
 - digital marketing tools: e.g. search engine optimisation (SEO), social media targeting, email campaigns, influencer marketing, pay-per-click advertising, video marketing
 - market campaign planning: aligning strategy with objectives and audience.

Learning aim B: Examine positioning and differentiation strategies in marketing [SP - CT]

B1 Positioning strategies

- Developing a positioning strategy: how you want the customers to perceive the product/brand.
- Linking positioning to segmentation - branding and value proposition alignment with target segments.
- Positioning strategies:
 - product differentiation: unique features, quality, design, or innovation
 - price positioning: premium versus budget offerings
 - usage positioning: when or how the product is used
 - user positioning: targeting specific user groups e.g. professionals, students
 - competitor-based positioning: positioning against or away from competitors.

B2 Concept of differentiation

- Purpose of differentiation: to make a product stand out from competitors, to create a competitive advantage by offering unique, desirable attributes that customers value and are willing to pay for.
- Types of differentiation:
 - goods-based differentiation: features, quality, design, innovation
 - service-based differentiation: customer service, delivery options, after-sales support
 - brand-based differentiation: reputation, emotional appeal, brand story
 - price-based differentiation: premium versus budget positioning
 - channel-based differentiation: unique distribution or access methods (e.g. online exclusivity).
- Linking differentiation to market segmentation.

B3 Differentiation strategies

- Unique selling point (USP): what makes the product/brand unique.
- Value proposition: the promise of value to be delivered to the customer.
- Competitive analysis: identifying gaps in the market and opportunities to differentiate.

B4 Tools and frameworks

- SWOT analysis to identify strengths that can be leveraged for differentiation.
- Perceptual mapping to identify gaps in the market, analyse competitive positioning, assist in target market selection, guide product development and branding strategies.
- Customer profiling to create a detailed description of the ideal customer and allow the business to tailor differentiation strategies.

Learning aim C: Explore the development and implementation of marketing strategies to achieve business aims [SP - CT]

C1 Purpose of marketing strategies

- Purpose of marketing strategies:
 - to support of overall business aims, e.g.
 - financial (profitability, return on investment)
 - market (market share, growth in market)
 - customer (satisfaction, loyalty, retention)
 - alignment with SMART (specific, measurable, achievable, relevant and time-bound) targets for marketing objectives:
 - e.g. improving customer loyalty, launching new products/services, increasing market share, enhancing brand awareness.

C2 Development of marketing strategies

- Types of marketing strategies:
 - branding strategies: to differentiate from competitors, build trust and credibility, impact business value and customer loyalty, strengthen relationships with customers
 - digital marketing and promotional strategies: to reach the right audience, at the right time, with the right message
 - pricing strategies: to impact sales, customer perception, market positioning and profitability.
- Integration of the marketing mix (7Ps) into strategy development.
- Consideration of budget, resources, and timescales when developing strategies.

C3 Implementation of marketing strategies

- Planning for implementation:
 - how to translate marketing strategies into actionable plans
 - setting SMART targets for strategy implementation
 - allocating resources, budgets and timelines
 - identifying responsibilities and roles within the marketing team.
- Marketing mix application:
 - applying the 7Ps (product, price, place, promotion, people, process, physical evidence) to ensure consistency with the chosen strategy
 - adapting the marketing mix for different segments and channels

- Operational considerations:
 - scheduling and sequencing activities e.g. campaign launch phases
 - coordination across departments e.g. sales, operations, finance
 - legal and ethical compliance

C4 Monitoring and control

- Setting Key Performance Indicators (KPIs) to measure success of marketing activities in achieving objectives.
- Using analytics to track performance of marketing activities:
 - e.g. website, social media, email marketing and advertising analytics, sales and conversion metrics.
- Implementing feedback loops for continuous improvement:
 - e.g. to identify weaknesses, improve customer understanding, optimise campaigns, increase return on investment, promote engagement.
- Identifying potential risks:
 - e.g. budget overruns, delays, competitor actions.
- Developing contingency plans:
 - e.g. identifying potential risks, assessing the level of impact and likelihood of occurrence, developing a step-by-step response plan, assigning roles and responsibilities, drafting communication templates for responses.

Assessment criteria

Learning aim A: Explore market segmentation and the importance of identifying the target market

Pass	Merit	Distinction
<p>A.P1 Research and explain how a given business segments its market and the techniques used for identifying target markets. [EL – SRS]</p> <p>A.P2 Explain how the segmentation criteria and variables used by a given business align with its marketing objectives.</p>	<p>A.M1 Analyse the segmentation methods used to identify and evaluate target markets help a given business to achieve its marketing objectives.</p>	<p>A.D1 Evaluate the segmentation methods used to identify and assess target markets for a given business and recommend potential improvements to its current approach.</p>

Learning aim B: Examine positioning and differentiation strategies in marketing

Pass	Merit	Distinction
<p>B.P3 Research and explain the positioning strategy for a given product. [EL – SRS]</p> <p>B.P4 Explain the differentiation strategies used by a given product.</p>	<p>B.M2 Analyse the positioning and differentiation strategies for a given product, and the effectiveness of these strategies in achieving the marketing objectives of the business.</p>	<p>B.D2 Evaluate the positioning and differentiation strategies for a given product, and recommend potential improvements to these strategies.</p>

Learning aim C: Explore the development and implementation of marketing strategies to achieve business aims

Pass	Merit	Distinction
<p>C.P5 Research and explain the role of marketing strategies in achieving objectives for a given business. [EL – SRS]</p> <p>C.P6 Explain the development of marketing strategies in a given business.</p>	<p>C.M3 Analyse the development and implementation of marketing strategies in a given business.</p>	<p>C.D3 Evaluate the development and implementation of marketing strategies, recommending improvements to marketing strategies in a given business.</p>

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS ✓	IS – T	SP – C&I
MY – PGS	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for Pearson Set Assignment (PSA)

Pearson sets the assignment for the assessment of this unit.

The PSA will take 9 hours to complete.

The PSA will be marked by centres and verified by Pearson.

The PSA will be valid for the lifetime of this qualification.

Assessing the PSA

You will make assessment decisions for the PSA using the assessment criteria provided.

The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on PSAs. There is also further information on our website.

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must research and evaluate the segmentation approach of a given business, looking at the benefits achieved such as improved customer experience and satisfaction, targeted marketing, and competitive advantage and the key challenges and limitations. Students must come to a well-supported conclusion with recommendations for potential improvements to the current approach of the business. Students must critically assess the benefits achieved through segmentation and target market identification, such as improved customer satisfaction, targeted marketing, and competitive advantage. The report should provide well-thought-out suggestions for potential improvements to the methods used, considering the identified challenges and limitations.

For merit standard, students must provide research and a detailed analysis of the effectiveness of the segmentation strategy of a given business. This includes how effective the strategy is in helping the business to achieve its marketing objectives. Students must identify any challenges or limitations the business faces in its segmentation approach, such as data collection issues, market dynamics, or resource constraints. Students must provide analysis that goes beyond description of the effectiveness of the segmentation methods and techniques. This includes developed reasoning of how well the methods help businesses achieve their marketing objectives. The report should identify any challenges or limitations businesses face in their segmentation approach, such as data collection issues, market dynamics, or resource constraints.

For pass standard, students must research and explain how a given business segments its market, including the types and variables used (e.g. demographic, geographic, psychographic, and behavioural factors). They must explain the reasons behind the segmentation strategy and how it aligns with its marketing objectives. Students must clearly describe the different market segmentation methods (demographic, geographic, psychographic, and behavioural) and techniques for identifying target markets (market research, segmentation analysis, competitor analysis, trend analysis, and customer profiling). They must also include an explanation of the benefits and drawbacks of each segmentation method and the effectiveness of the techniques used.

Learning aim B

For distinction standard, students must evaluate the positioning and differentiation strategies of a given business. The report should consider the tools and frameworks used to develop these strategies. The student should come to a supported conclusion on their effectiveness and provide well-thought-out recommendations for potential improvements to the brand's strategies, considering any identified challenges and limitations.

For merit standard, students must analyse the effectiveness of the brand's positioning and differentiation strategies and the tools used to develop these strategies. This includes the use of positioning and differentiation in helping the business achieve its marketing objectives. The report should identify any challenges or limitations the product faces in its current positioning and differentiation approach.

For pass standard, students must explain how a given business positions its products in the market, and how it differentiates these products from those of its competitors. Students will consider its use of goods-based, service-based, brand-based, price-based and/or channel-based differentiation methods.

Learning aim C

For distinction standard, students must critically assess the benefits achieved through the marketing strategies, such as improved customer satisfaction, targeted marketing, and competitive advantage. The report should also provide well-thought-out suggestions for potential improvements to the marketing strategies, considering the identified challenges and limitations.

For merit standard, students must analyse beyond description and evaluate the effectiveness of the marketing strategies. This includes discussing how well the strategies help businesses achieve their marketing objectives. The report should identify any challenges or limitations businesses face in their marketing strategy development and implementation, such as resource constraints, market dynamics, or competitive pressures.

For pass standard, students must explain how marketing strategies align with SMART marketing objectives and overall business goals. This includes discussing the role of marketing strategies in increasing revenue, expanding the customer base, and enhancing brand awareness. The report should describe the process of creating effective marketing strategies, including market analysis, goal setting, and the integration of the marketing mix (7Ps). Students must also explain the steps involved in putting marketing strategies into action, such as planning, resource allocation, and setting SMART objectives for implementation. The report should describe how businesses track the performance of their marketing strategies, set Key Performance Indicators (KPIs), and make necessary adjustments.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 17: Creative Marketing.

Unit 3: Generating Customer Loyalty

Level: 3

Unit type: Pearson Set Assignment

Guided learning hours: 60

Unit in brief

This unit helps students understand how organisations create and maintain strong customer relationships. It focuses on strategies to build trust, encourage repeat business, and enhance customer satisfaction, all of which contribute to long-term business success.

Unit introduction

Generating customer loyalty puts the customer and customer retention at the centre of the organisation, ahead of its products and services. Organisations engage in generating customer loyalty to continually attract repeat business. Strategies are designed to increase loyalty, interaction, communication and long-term engagement by providing information directly suited to customer needs and interests.

In this unit, you will learn how generating customer loyalty attempts to keep customers engaged by providing marketing information and responses to enquiries and promoting and selling additional products and services. You will focus on how technology supports and facilitates this as organisations build databases of customer details that they then use to create loyalty and tailored relationships with individual customers. Similarly, you will look at how social media offers a direct and instant way for organisations and customers to communicate with each other. You will explore how effective generation of loyalty results in customers who continue to buy products (goods and services), satisfying their needs and helping organisations meet their aims and objectives.

This unit will support you in continuing your study of generating customer loyalty through a marketing-related degree or a professional qualification. It will also give you the skills to progress to employment in this area.

Learning aims

In this unit you will:

- A** Examine the purposes and benefits for an organisation and its customers of generating customer loyalty
- B** Investigate the information required by an organisation to implement customer loyalty strategies
- C** Review the methods used by an organisation of generating customer loyalty.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Examine the purposes and benefits for an organisation and its customers of generating customer loyalty</p>	<p>A1 Purposes of customer loyalty strategies A2 Organisational benefits A3 Customer benefits</p>	<p>This unit is assessed through a Pearson Set Assignment</p>
<p>B Investigate the information required by an organisation to implement customer loyalty strategies</p>	<p>B1 Gathering and analysing customer data B2 Use of customer data B3 Implementing relationship marketing strategies to generate customer loyalty B4 Impact of customer loyalty strategies on the 7P marketing mix</p>	
<p>C Review the methods used by an organisation of generating customer loyalty</p>	<p>C1 Key factors of generating customer loyalty C2 Attracting and retaining customers using financial methods C3 Attracting and retaining customers using non-financial methods C4 Performance measurement</p>	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Examine the benefits for an organisation and its customers of generating customer loyalty [EL - MOL]

Students will understand the purpose of generating customer loyalty and how it can benefit both the organisation and the customer.

A1 Purposes of customer loyalty strategies

- Difference between transactional marketing and generating customer loyalty
 - transactional marketing: focuses on obtaining new customers, with little emphasis on customer service
 - generating customer loyalty: focuses on customer retention, with a high emphasis on customer service.
- Generating customer loyalty as part of the marketing strategy of an organisation
 - makes a bridge between the buyer and the seller
 - emphasises customer retention, satisfaction and lifetime customer value
 - markets to current customers rather than acquiring new customers
 - builds brand awareness and positions the brand as the customer's best option
 - facilitates two-way conversations with customers
 - tailors marketing activities to customers' needs and interests using digital and social networks
 - contributes to the achievement of marketing objectives such as an increase in market share, repeat sales, satisfaction ratings, revenue growth and brand recognition.

A2 Organisational benefits

- Retains long-term customers and improves repeat sales.
- Improves ability to cross-sell.
- Builds better customer relationships.
- Builds brand loyalty and trust.
- Increases the likelihood of referrals.
- Improves reputation.
- Adds/attracts new customers.
- Profiles customers, which supports targeted marketing and increases sales.

- Reduces costs by restricting:
 - customer loss/turnover/churn rate
 - negative customer perceptions that affect future sales
 - low referral rates
 - reputational damage.
- Adds value to the customer relationship by developing further revenue generating opportunities.
- Supports marketing objectives such as an increase/improvement in market share, quality of service to existing customers and gaining a competitive advantage.

A3 Customer benefits

- Customer needs are better understood.
- Enhances the customer experience
- Customers feel valued
- Provides preferential treatment and premium products (goods and services).
- Offers financial and non-financial rewards

Learning aim B: Examine the benefits for an organisation and its customers of generating customer loyalty [SP - CT]

Students will understand the importance of gathering and analysing customer data to inform customer loyalty strategies.

B1 Gathering and analysing customer data

- Key sources of data
 - customer databases and data from loyalty schemes: track purchase history and frequency to understand behaviour patterns and personalise offers
 - transaction data from point-of-sale systems, online purchases, subscriptions purchase history: trends and patterns in customer spending habits
 - behavioural patterns from browsing histories, clicks and email opens, data from support tickets and chat logs to identify pain points and improve service quality
 - social media analytics: sentiment, engagement, conversations to understand customer needs and identify brand advocates
 - customer surveys and feedback: surveys, reviews, feedback to measure satisfaction and identify areas for improvement
 - data found in customer relationship management programmes.

- Possible data issues
 - data privacy and legal compliance
 - customer/ethical concerns about collection and use of data
 - inaccurate, incomplete or outdated data
 - data breaches and cyberattacks
 - costs of data management.

B2 Use of customer data

- Segmenting/grouping customers, using customer profiles and categorisation to create a detailed description of the customer.
- Tracking customer preferences, behaviour and interactions.
- Identifying rate of customer defection to understand customer dissatisfaction.
- Identifying and removing/managing unprofitable/unwanted customers.

B3 Implementing relationship marketing strategies to generate customer loyalty

- Relationship marketing focuses on customer retention, satisfaction and lifetime value.
- Key relationship marketing strategies
 - offering personalised communication and providing web pages tailored to individual visitors' needs and preferences
 - offering loyalty and rewards programmes
 - using satisfaction surveys and rating tools to engage with customers, gather feedback and continuously improve the customer experience
 - creating a community using private social media groups, forums and events and sharing high-quality helpful, educational or entertaining content
 - providing excellent customer service where staff respond quickly, respectfully and helpfully and providing after-sales follow up and support.
- Relationship costs: the costs involved in setting up and maintaining relationships.
- Partnership-level agreement: customers see the brand as a partner, create exclusive, shared value through collaborations with other businesses, listening to customer feedback to create solutions together, building strong emotional connections, leading to increased retention and advocacy.

B4 Impact of customer loyalty strategies on the 7P marketing mix

- Product: continuously improving products based on customer feedback, using customer data to customise products and offer exclusive editions.
- Price: offering competitive pricing, loyalty discounts, special offers, reward pricing.
- Place: offering a wide range of ways for the customer to obtain the product, making repeat purchases quick and convenient, offering free delivery.
- Promotion: having individual/tailored communication with customers that makes them feel valued and included.

- People: providing personal touchpoints with customers to build trust and make customers feel heard and appreciated e.g. direct conversations or live chats.
- Physical evidence: making the experience feel premium to reinforce brand image.
- Processes: making access to the product simple, providing efficient after-sales processes, making experiences in the customer journey easy through offline and online touchpoints.

Learning aim C: Review the effectiveness of the methods used by an organisation to generate customer loyalty [SP - CT]

Students will understand the key factors of generating customer loyalty, and the advantages and disadvantages of using financial and non-financial methods to attract and retain customers.

C1 Key factors of generating customer loyalty

- Fostering positive relationships.
- Providing customer satisfaction through understanding, meeting and exceeding customer needs and expectations.
- Ensuring high standards of customer service.
- Developing segmentation techniques to focus on the right customer.
- Customer Acquisition Cost (CAC): total expense a business incurs to gain one new customer, enables businesses to evaluate the efficiency of marketing efforts, can be compared to customer lifetime value (LTV) to determine overall profitability.

C2 Attracting and retaining customers using financial methods

- Financial methods that provide monetary benefits to customers e.g.
 - discounts/percentage off purchases
 - welcome bonuses, cashback offers, rewards
 - flexible finance e.g. interest-free credit on purchases, buy now pay later options
 - points for each purchase that can be redeemed for rewards/money off
 - free product after a number of purchases/visits e.g. free drink after buying ten
 - frequent user perks/availability of ancillary goods and services e.g. free entrance to airline lounges
 - referral incentives for recommending a friend
 - free delivery with subscription (paid) programmes
 - value-alignment programmes that reward actions aligned with shared values e.g. donations to charity and sustainability initiatives.

- Advantages of using financial methods
 - attracts a wide audience
 - positive impact on customer acquisition and sales
 - encourages new customers to try the product
 - encourages repeat purchases.
- Disadvantages of using financial methods
 - reduced profit margins
 - customer dependency on offers
 - attracts price-sensitive customers
 - costly over time.

C3 Attracting and retaining customers using non-financial methods

- Non-financial methods e.g.
 - personalised communications
 - helplines and named points of contact
 - tailored products and customised services
 - live marketing that allows consumers to sample/use products for free before making a purchase
 - 'nudge' marketing that encourages purchasing e.g. price anchors, pop-ups on online stores, product bundling, social proof
 - proximity texts sent to customers using location-based marketing techniques
 - loyalty programmes that raise personal status, offer value or exclusivity
 - tiered membership programmes offering preferential services e.g. previews, early access, private sales, special events, priority booking, recognition through badges
 - social media use e.g. community building, real time engagement, tailored content, social listening
 - use of QR codes to streamline the customer journey
 - rapid response speed e.g., chatbots, automated emails and AI to acknowledge and handle common queries.
- Advantages of using non-financial methods
 - does not rely on financial incentives
 - builds emotional connections
 - builds brand reputation and customers trust
 - encourages loyalty and repeat purchases
 - differentiates from competitors.

- Disadvantages of using non-financial methods
 - takes time to have an impact
 - results are hard to track/measure
 - does not attract price-sensitive customers.
- Blended strategy uses financial methods to attract customers and non-financial methods to retain customers and build loyalty.

C4 Performance measurement

- Setting standards for customer loyalty activities
 - service levels
 - quality standards
 - customer charters.
- Measuring performance
 - loyalty profitability: the measure of financial gains a business receives from retaining loyal customers
 - customer lifetime value: the value of customers' purchasing over the lifetime of the relationship calculated by (customer value x average customer lifespan)
 - customer retention rate: the percentage of customers retained over a specific period calculated as $\frac{\text{end customer count} - \text{new customer count}}{\text{starting customer count}} \times 100$
 - net promoter score: how likely customers are to recommend or promote the products of the business rated high (loyal customers), mid-range customers (possible churn risk) and low (customers that threaten the brand by spreading negative word-of-mouth about the business).

Assessment criteria

Learning aim A: Examine the purposes and benefits to a selected organisation of generating customer loyalty

Pass	Merit	Distinction
<p>A.P1 Explain the purposes of customer loyalty strategies.</p> <p>A.P2 Explain how generating customer loyalty benefits an organisation and its customers.</p>	<p>A.M1 Analyse the importance for a selected organisation of generating customer loyalty.</p>	<p>A.D1 Evaluate the impact customer loyalty has on the achievement of the marketing objectives of a selected organisation.</p>

Learning aim B: Investigate the information required to implement customer loyalty strategies

Learning aim C: Review the methods of generating customer loyalty in a selected organisation

Pass	Merit	Distinction
<p>B.P3 Explain the types of information used by a selected organisation to generate customer loyalty.</p> <p>B.P4 Explain the impact of generating customer loyalty on the marketing mix of a selected organisation.</p>	<p>B.M2 Analyse the use of customer loyalty information in developing customer relationships and establishing loyalty in a selected organisation.</p>	<p>BC.D2 Evaluate the importance of customer information to the development and implementation of customer loyalty strategies.</p> <p>BC.D3 Evaluate the effectiveness of customer loyalty methods in a selected organisation and their effect on loyalty and purchasing behaviour.</p>
<p>C.P5 Explain the key factors in generating customer loyalty and the financial and non-financial methods used by a selected organisation.</p> <p>C.P6 Explain how organisations can judge the effectiveness of methods used to generate customer loyalty. [SP – C&I]</p>	<p>C.M3 Analyse the financial and non-financial methods of generating customer loyalty used by a selected organisation.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL *	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I ✓
MY – PGS	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for Pearson Set Assignment (PSA)

Pearson sets the assignment for the assessment of this unit.

The PSA will take 9 hours to complete.

The PSA will be marked by centres and verified by Pearson.

The PSA will be valid for the lifetime of this qualification.

Assessing the PSA

You will make assessment decisions for the PSA using the assessment criteria provided.

The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on PSAs. There is also further information on our website.

Further information for teachers and assessors

Resource requirements

There are no specific additional requirements for this unit, but centres must give students access to information on a range of organisations and their relationship marketing activities.

Essential information for assessment decisions

Learning aim A

Students will draw on the varied information from the given context in the Pearson Set Assignment and consider the relevance and significance of the unit coverage within that context. This will lead to a supported judgement and conclusion established within the given context.

For distinction standard, students must evaluate the impact that generating customer loyalty has on a selected organisation. They should consider how customer loyalty strategies such as loyalty schemes, personalised communications and reward programmes contribute to the achievement of marketing objectives such as increased sales, higher retention rates, and enhanced brand reputation. Students are expected to use this information to make well-supported and insightful judgements on whether these strategies effectively generate customer loyalty, considering both short-term and long-term outcomes. Their conclusion should be supported by relevant examples, demonstrating an understanding of the relationship between loyalty strategies and organisational success.

For merit standard, students must present a thorough and structured analysis of the purpose of generating customer loyalty, clearly showing the differences between transactional marketing and generating loyalty. They should consider the benefits to the organisation of generating loyalty, including improved customer satisfaction, repeat business, and positive word-of-mouth. The analysis should also address how these strategies support the achievement of marketing objectives and the ways in which they create value for customers, such as through enhanced service experiences, exclusive offers, or a sense of belonging.

For pass standard, students must have clear reasons and supporting evidence for their views on the purpose of customer loyalty strategies. They should explain how organisations gather and use customer loyalty information, such as through surveys, transaction histories, or membership data, and how this information feeds into the marketing mix. Students should consider the key benefits of generating customer loyalty including the potential for increased customer retention and the development of mutually beneficial relationships. Additionally, they should explain how these benefits translate into benefits for both the organisation (such as cost savings or more predictable revenues) and for customers (such as personalised offers or improved service), using examples where possible.

Learning aims B and C

For distinction standard, students will draw on varied information to consider how a selected organisation gathers and uses customer loyalty information and implements customer loyalty marketing strategies and the marketing mix. They will make supported judgements on the key factors of generating customer loyalty and the advantages and disadvantages of using financial and non-financial methods to attract and retain customers to the selected organisation in meeting its objectives.

For merit standard, students will present the outcome of a methodical and detailed examination of how a selected organisation gathers and uses customer loyalty information and implements customer loyalty strategies and the marketing mix. They will also interpret key factors of generating customer loyalty and the advantages and disadvantages of using financial and non-financial methods to attract and retain customers to the selected organisation in meeting its objectives.

For pass standard, students will give reasons to support their view on how a selected organisation gathers and uses customer loyalty information and the marketing mix. They will give evidence of the key factors of generating customer loyalty and make judgements on methods of generating customer loyalty used by a selected organisation.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 2; Marketing Segmentation and Marketing Strategies
- Unit 4: Branding Products and Services
- Unit 6: Investigating Customer Communications
- Unit 7: Investigating Digital Marketing
- Unit 10: Developing a Digital Marketing Campaign
- Unit 15: Customer Immersion Experiences
- Unit 16: Activating a Brand
- Unit 17: Creatives Marketing
- Unit 18: Market Research.

Unit 4: Branding Products and Services

Level: 3

Unit type: Pearson Set Assignment

Guided learning hours: 60

Unit in brief

The purpose of this unit is to help students understand how effective branding adds value to products and services. The unit explores how businesses create, position, and manage brands to influence customer perceptions, build loyalty, and gain a competitive advantage in the marketplace.

Unit introduction

Brands surround us in our everyday lives. People may judge others by their brand of car, their brand of clothes or the brand of drinks they consume. Brands can help give people identity and image. Because of this, marketing is often brand driven, with the objective of establishing a product or service with a separate identity in consumers' minds, making the product or service desirable, wanted and even needed. Messages are carefully crafted to build customer views and expectations of the products or services associated with the brand. Constant advances in digital-based processes and systems, and changes in customer behaviour and use of social media, present a challenge for organisations which work to maintain, develop or reinforce their brand identity. Organisations invest a huge amount of effort and resources to ensure that the customer recognises and responds to their brand identity in the right way.

In this unit, you will consider the ways in which organisations use branding to achieve their marketing objectives and organisation aims. You will explore the ways in which branding influences the marketing mix and how brand-strategy recommendations are developed according to market needs.

This unit will support you in continuing your studies of branding through a marketing related degree or a professional qualification. The unit will also give you the skills to progress to employment in a branding-related role.

Learning aims

In this unit you will:

- A** Investigate the role of branding in a selected organisation
- B** Review how branding is used by a selected organisation
- C** Recommend improvements to a brand for an existing product or service.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Investigate the role of branding in a selected organisation	A1 Principles of branding A2 Brand as an asset A3 Benefits and limitations of building a brand	This unit is assessed through a Pearson Set Assignment
B Review how branding is used by a selected organisation	B1 Branding as part of organisation strategy B2 Brand design B3 Factors influencing branding activities	
C Recommend improvements to a brand for an existing product or service	C1 Challenges of managing brands C2 Improving a brand	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Investigate the role of branding in a selected organisation

[EL - SRS]

A1 Principles of branding

- Product or service.
- Branding: the elements that define the image, ethos and tone of an organisation and its products or services.
- Brand: a characteristic name, logo/symbol, colours, personality, values or shape that distinguishes a good or service from that of another supplier.
- Brand portfolio: a collection of brands under the control of an organisation.
- Types of brand:
 - organisation name, such as manufacturers and retailers
 - product and product ranges, such as cars or drinks
 - person, such as a celebrity, actor, singer or entrepreneur.
- Use of branding:
 - new brands
 - brand extensions
 - sub-brands
 - product extension.
- Target audiences for brands.
- Consumer feelings about and connections with a brand:
 - brand awareness and recognition
 - perceived qualities associated with the brand
 - loyalty to the brand.
- Customer loyalty ladder:
 - suspects to prospects
 - prospects to customers
 - customers to clients
 - clients to advocates.
- Branding as part of the marketing mix.

A2 Brand as an asset

- Value of a brand: the total financial value of a brand.
- Brand equity (positive and negative): the differential effect that knowing the brand name has on a customer's response to the product or service and its marketing, the value of a brand beyond physical assets.
- Customer equity: the value of customer relationships that a brand creates.
- Protecting the brand: legal issues – trademark registration, copyright, patent registration/IP (intellectual property).
- Research ethics and GDPR involved in data collection.

A3 Benefits and limitations of building a brand

- Benefits of building a brand:
 - differentiate the product to provide a source of competitive advantage
 - increases customer engagement
 - increases customer loyalty and customer advocates
 - can command premium prices/higher prices than non-branded products or services
 - reduces price sensitivity
 - increases value of the organisation
 - makes consumer choice and recognition of products or services easier
 - strong brand awareness leads to high sales and high market share
 - retailers and service sellers are more likely to stock top-selling brands than less well-known brands
 - brand portfolios allow organisations to compete in many different marketplaces with a range of product lines or services.
- Limitations of building a brand:
 - may take time to build a brand
 - high cost of promotion, keeping brand in the customers' eyes
 - loss of brand value for one product or service can affect a range of similar products or services
 - successful brands invite competition and copycats
 - high cost of research and development in ensuring brand continues to develop.
- Research ethics and GDPR involved in data collection.

Learning aim B: Review how branding is used by a selected organisation [SP - CT]**B1 Building a brand as part of organisation strategy**

- Brand strategy:
 - a long-term plan for the development of a successful brand in order to achieve specific goals
 - aligns with organisation aims and objectives for the product or service
 - influences the marketing strategy of an organisation.
 - hierarchy of strategy, e.g. organisation corporate strategy - marketing strategy - branding strategy

B2 Brand design

- Brand building: shaping a business's identity to create specific perceptions of a brand in the minds of customers:
 - consistent effort across all aspects: visuals, messaging, customer experience
 - build awareness, trust, strong connection with customers
 - key steps: market research, defining brand's voice and story, creating a logo and visual identity, consistency across all touchpoints
- Pedagogy of brand building: effective and impactful communication strategies that educate and engage customers:
 - structured brand messaging with a clear 'what' and 'how', to build recognition and loyalty
 - achieved through storytelling, problem-based learning, creating interactive experiences to teach consumers about the brand and its values.
- Brand aspects:
 - intangibles – promise, personality, positioning and emotion
 - tangibles – identifying symbols, e.g. logos, graphics, colours, product shape and sounds, e.g. music, jingles, voice.
- Touchpoints – any interaction between the consumer and the brand, such as:
 - advertising
 - organisation vehicles and livery used
 - company clothing, e.g. uniforms
 - signage and logos
 - branded mobile apps
 - content marketing, to include web landing pages, blogging, videos, podcasts, email, social media sites and communities
 - staff
 - packaging.

B3 Factors influencing branding activities

- B2B factors: logical, long-term business relationships, ROI, use of professional content and channels e.g. industry events, LinkedIn
- B2C factors: emotional, individual customer needs, impulse-driven purchases through channels e.g. social media and retail stores.
- Internal influences:
 - size of the organisation
 - stage of the organisation – stage of the product life cycle
 - type of product or service
 - geographical location of organisation
 - budget for branding.
- External influences:
 - competition from other organisations
 - social pressure and conventions relating to the product or service
 - political climate
 - advances in technology and scope of digital platforms available
 - impact of customers communicating positively and negatively about the brand..

Learning aim C: Recommend improvements to a brand for an existing product or service [SP - C&I]

C1 Challenges of managing brands

- Brand management: analysis and planning of how a brand is perceived in the market, brand success and brand failure.
- Maintaining branding relationship with customers throughout the product or service life cycle.

C2 Improving a brand

- Brand audit – a formal assessment of a brand’s strengths and weaknesses, to include:
 - existing marketing strategies, materials and communications
 - the customer perception of brand through primary and secondary data
 - comparison with competitors’ brands for similar products or services.
- Changing the perceptions of a brand:
 - re-branding
 - brand refreshing
 - brand relaunching.

- Reasons for changing a brand:
 - change in organisation aims and objectives
 - changes in the market
 - trends
 - changes in customer behaviour, values and needs
 - competitors' branding strategies
 - technological and digital impact
 - increase brand value.
- Changes in branding and promotion to reflect social trends:
 - viral marketing – encouraging consumers to share information about products or services via the internet
 - social media sites – used to show benefits and features of products or services to differentiate from the competition
 - emotional branding – creating a bond between the consumer and the product or service by creating an emotional response to the advertising.

Assessment criteria

Learning aim A: Investigate the role of branding in a selected organisation

Pass	Merit	Distinction
<p>A.P1 Explain the principles of branding for a selected organisation.</p> <p>A.P2 Explain how brands can be an asset to a selected organisation.</p>	<p>A.M1 Analyse the advantages and disadvantages of branding to a selected organisation.</p>	<p>A.D1 Evaluate the impact of branding on a selected organisation, making a judgement on its significance.</p>

Learning aim B: Review how branding is used by a selected organisation

Learning aim C: Recommend improvements to a brand for an existing product or service

Pass	Merit	Distinction
<p>B.P3 Explain the reasons why a selected organisation has a brand strategy. [IS – C&SI]</p> <p>B.P4 Explain the branding of contrasting products or services in a selected organisation.</p>	<p>B.M2 Analyse the potential impact of internal and external factors on branding activities of a product or service.</p>	<p>BC.D2 Evaluate the extent to which the branding of a product or service meets the aim(s) of a selected organisation.</p> <p>BC.D3 Recommend suggested changes to an existing brand for a product or service.</p>
<p>C.P5 Explain the challenges of managing an existing brand for a product or service.</p> <p>C.P6 Explain the features of an existing brand for a good or service using a brand audit.</p>	<p>C.M3 Analyse the reasons why an existing brand for a product or service may need to change.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS *	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI ✓	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for Pearson Set Assignment (PSA)

Pearson sets the assignment for the assessment of this unit.

The PSA will take 9 hours to complete.

The PSA will be marked by centres and verified by Pearson.

The PSA will be valid for the lifetime of this qualification.

Assessing the PSA

You will make assessment decisions for the PSA using the assessment criteria provided.

The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on PSAs. There is also further information on our website.

Further information for teachers and assessors

Resource requirements

For this unit, students will need access to a range of current branding information.

Essential information for assessment decisions

Learning aim A

Students will carry out an investigation into an organisation that has a reputation for effective brand building. Students will draw on the varied information from the given context in the Pearson Set Assignment and consider the relevance and significance of the unit coverage within that context. This will lead to a supported judgement and conclusion established within the given context.

For distinction standard, students will draw on varied information, considering the relevance or significance of the branding used by an organisation. They will use their results to make reasoned judgements. They will come to a supported conclusion on the impact of branding. They will show understanding of the link between branding and achieving the aims and objectives, such as an increase or improvement in market share or improved competitive advantage.

For merit standard, students will present a methodical and detailed examination of the branding and its application used by an organisation. They will present the outcome of their analysis by detailing the advantages and disadvantages of branding to the organisation, including an explanation of how brands can be an asset.

For pass standard, students will show clear details of the principles of branding in a selected organisation and give reasons as to why brands can be an asset. They will clearly define branding in the context of the organisation (e.g. name, logo, colours, personality, values). They will also describe how the organisation uses branding and identify the types of brands relevant to the organisation.

Learning aims B and C

Students will continue their investigation into the organisation used for learning aim A.

For distinction standard, students will draw on varied information relevant to the organisation's brand strategy. They will look in more depth at the branding of two contrasting goods or services investigated and explain the challenges of managing this brand and the potential impact of internal and external factors on the branding activities for the product or service. They will evaluate the extent to which branding of this product or service meets the aim(s) of the organisation. With a view to improving the brand, they will carry out a brand audit to inform an analysis of reasons to change the brand, justifying all recommended changes with reference to the impact on the aim(s) of the organisation.

For merit standard, students will present a methodical and detailed examination of the reasons for the organisation having a brand strategy. They will look in more depth at the branding of two contrasting products or services investigated and analyse the challenges of managing this brand and the potential impact of internal and external factors on the branding activities for the product or service. Using a brand audit, they will analyse the reasons for changing the brand.

For pass standard, students will give reasons for the organisation having a brand strategy and use examples to explain the branding of two of its contrasting products or services. They will choose one of these contrasting products or services and explain the challenges of managing the brand. They will use primary and secondary research data to carry out a brand audit on the product or service, including the existing marketing strategies, materials and communications, the customer perception of the brand, and a comparison with competitors' brands for similar products or services.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 3: Generating Customer Loyalty
- Unit 6: Investigating Customer Communications
- Unit 7: Investigating Digital Marketing
- Unit 15: Customer Immersion Experiences
- Unit 16: Activating a Brand
- Unit 17: Creatives Marketing
- Unit 18: Market Research.

Unit 5: Responsible and Sustainable Marketing

Level: 3

Unit type: Pearson Set Assignment

Guided learning hours: 60

Unit in brief

This unit introduces responsible and sustainable marketing, showing how environmental, social and governance (ESG) principles are integrated into the marketing mix to meet stakeholder needs, avoid greenwashing, and support the circular economy. It explains how marketing can promote responsible consumption and build brand trust and competitiveness.

Unit introduction

Consumers make informed decisions about who they select to provide the products and services they use. Consumers expect authenticity, transparency and measurable sustainability commitments from organisations. Marketing plays a key role in communicating these values responsibly. In this unit, you will explore how ESG frameworks, responsible marketing practices and circular economy principles shape modern marketing strategies and operations.

You will learn how marketing decisions, from product design to promotion, can reduce environmental impact, encourage social equity and support ethical governance. The unit also highlights the risks of greenwashing and unethical communication, enabling you to evaluate real-world marketing examples and design marketing initiatives for a selected organisation that are impactful and responsible, embedding ESG and circular economy principles throughout.

This unit will help you to progress to employment in specific ESG roles, which may or may not be marketing related. The unit will also help you to progress to further study in higher education and to professional qualifications in marketing and social sciences.

Learning aims

In this unit you will:

- A** Explore the role of responsible marketing and ESG across the marketing mix
- B** Examine the benefits, challenges and risks of sustainable marketing strategies
- C** Plan a responsible and sustainable marketing initiative for an organisation.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Explore the role of responsible marketing and ESG across the marketing mix</p>	<p>A1 Responsible marketing and ESG principles A2 Integrating ESG into the marketing mix</p>	<p>This unit is assessed through a Pearson Set Assignment</p>
<p>B Examine the benefits, challenges and risks of sustainable marketing strategies</p>	<p>B1 Benefits of responsible marketing B2 Challenges and limitations of responsible marketing B3 Ethical risk and greenwashing</p>	
<p>C Plan a responsible and sustainable marketing initiative for an organisation</p>	<p>C1 Researching responsible marketing issues C2 Designing an integrated ESG marketing plan C3 Evaluating stakeholder and circular impacts</p>	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Explore the role of responsible marketing and ESG across the marketing mix [EL – SRS]

A1 Responsible marketing and ESG principles

- ESG: an evolving business practice that ensures sustainable development is incorporated in an organisation's business model.
- Principles of responsible marketing: transparency, honesty, fairness, inclusivity, accountability.
- Principles of ESG:
 - has a positive impact on social, economic and environmental factors
 - employees and customers are increasingly socially conscious and place a premium on working for and spending money with organisations that prioritise ESG, holding corporations accountable for effecting social change with organisation beliefs, practices and profits
 - improving organisation image
 - building a positive image of brand
 - motivating workforce.
- The link between ESG and marketing ethics.
- UN Sustainable Development goals (SDGs) and marketing's role in supporting responsible consumption and production (SDG 12).
- Internal and external stakeholders and their expectations: customers, employees, suppliers, regulators, communities.

A2 Integrating ESG into the marketing mix

- Product: sustainable sourcing, designing for durability, repair and reuse, minimal packaging, eco-labelling.
- Price: fair pricing strategies, reflecting environmental and social value.
- Place: sustainable logistics, local supply chains, digital distribution, ethical sourcing transparency.
- Promotion: avoiding misleading claims, honest sustainability messaging, storytelling that supports behaviour change.
- People: diversity, inclusion and ethics in marketing teams and representation.
- Process: ethical governance, sustainable production processes, stakeholder consultation.

- Physical evidence: sustainable packaging retail environments and certification that support credibility
- Circular economy and life-cycle marketing.
- Life-cycle thinking: design, production, use, reuse, recycling, regeneration.
- Marketing's role in promoting product longevity and waste reduction.
- Circular marketing practices: rental, refill, sharing, repair.
- Communicating the circular value proposition responsibly.

Learning aim B: Examine the benefits, challenges and risks of sustainable marketing [SP - CT]

B1 Benefits of responsible marketing

- Improved reputation, e.g. impact on customers and other stakeholders.
- Improved customer loyalty/brand image and advocacy.
- Enhanced employee recruitment, motivation and retention.
- Benefits to third-party causes.
- Potential cost reduction from efficiency and innovation.
- Potential increase in sales and customer demand.
- Strengthened relationships with responsible suppliers and communities.
- Brand differentiation and trust.
- Access to sustainable finance and partnerships.
- Contribution to long-term business resilience.

B2 Challenges and limitations of responsible marketing

- Cost of transitioning to sustainable models.
- Distraction from core organisation objectives and lowering of operating profits.
- Smaller marketing organisations/agencies/departments less able to operate in an ESG way because of costs.
- Perceived as a 'green washing' exercise with little actual substance.
- Cost versus benefit analysis of ESG and measuring ESG impact.
- Managing complex global supply chains.
- Balancing profit with purpose.
- Organisation resistance and lack of understanding.

B3 Ethical risk and greenwashing

- Defining and identifying greenwashing: vague claims, lack of evidence, hidden trade-offs.
- Regulatory standards: CMA Green Claims Code, ISO 14021.
- Misleading sustainability marketing examples and their reputational impact.
- Building credibility through third-party verification, transparency and measurable goals.

Learning aim C: Plan a responsible and sustainable marketing initiative [SP - C&I]

C1 Researching responsible marketing issues

- Collecting primary and secondary data on ESG performance, market trends and stakeholder expectations.
- Sources of information, e.g.:
 - annual sustainability reports
 - media
 - pressure groups
 - company website
 - perception poll and consumer insights
 - social and environmental audits.
- Benchmarking competitors' responsible marketing activities.

C2 Designing an integrated ESG marketing plan

- Measurable objectives aligned to ESG and circular economy principles and SDGs.
- Rationale.
- Key activities and timelines.
- Incorporating circular economy practices in product and communication strategy.
- Key messages that promote authenticity and stakeholder value and benefits.
- Risk analysis including greenwashing safeguards and avoidance strategies and authenticity checks.
- Budgeting and resource requirements.
- Long and short-term impact on internal and external stakeholders.
- Monitoring KPIs for impact and evaluation: carbon reduction, engagement, trust metrics.
- Scalability of proposals and continuous improvement.
- Data, evidence and examples.

C3 Evaluating stakeholder and circular impacts

- Positive and potential negative impacts.
- Short- and long-term benefits for internal and external stakeholders.
- Lifecycle implications, feedback, continual improvement.

Assessment criteria

Learning aim A: Explore the role of responsible marketing and ESG across the marketing mix

Learning aim B: Examine the benefits, challenges and risks of sustainable marketing

Pass	Merit	Distinction
<p>A.P1 Explain how ESG and circular principles influence marketing decisions and stakeholder relationships in a selected organisation.</p> <p>A.P2 Describe responsible marketing initiatives undertaken by a selected organisation.</p>	<p>A.M1 Analyse how a selected organisation integrates ESG and circular principles into the marketing mix.</p>	<p>AB.D1 Evaluate how effectively a selected organisation applies ESG and circular economy principles across the marketing mix.</p> <p>AB.D2 Evaluate how responsible marketing enhances competitive advantage and brand authenticity in a selected organisation.</p>
<p>B.P3 Explain potential benefits of responsible marketing in a selected organisation.</p>	<p>B.M2 Assess the benefits, challenges and risks of responsible marketing in a selected organisation.</p>	

Learning aim C: Plan a responsible and sustainable marketing initiative

Pass	Merit	Distinction
<p>C.P3 Create a basic responsible marketing plan addressing ESG and circular issues for a selected organisation.</p>	<p>C.M3 Produce a detailed and feasible ESG marketing plan with a clear rationale and stakeholder benefits for a selected organisation. [SP – PS]</p>	<p>C.D3 Justify the potential long-term impact and scalability of the proposed responsible marketing plan for a selected organisation.</p>

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS ✓
MY – COP	EL – SRS *	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for Pearson Set Assignment (PSA)

Pearson sets the assignment for the assessment of this unit.

The PSA will take 9 hours to complete.

The PSA will be marked by centres and verified by Pearson.

The PSA will be valid for the lifetime of this qualification.

Assessing the PSA

You will make assessment decisions for the PSA using the assessment criteria provided.

The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on PSAs. There is also further information on our website.

Further information for teachers and assessors

Resource requirements

For this unit, students will need access to research facilities in order to research ESG materials.

Essential information for assessment decisions

Learning aims A and B

For distinction standard students will provide a comprehensive and critical evaluation of how a selected organisation integrates responsible marketing and ESG principles across all aspects of the marketing mix, demonstrating how this strengthens brand credibility and long-term sustainability. Students will consider the effectiveness and authenticity of these strategies, referencing measurable outcomes such as reduced environmental impact, improved stakeholder trust and innovation in circular economy practices. The evaluation will consider how the organisation prevents or responds to accusations of greenwashing and maintains transparency through evidence-based marketing claims. Students will use a wide-range of research sources including sustainability and ESG reports, customer research, industry benchmarks and third-party verifications to assess how responsible marketing enhances competitive advantages. They will come to a judgement in a conclusions on which ESG marketing practice has the most impact on sustainability and this will be supported by examples and research.

For merit standard, students should demonstrate a detailed and balanced analysis of how a selected organisation applies responsible marketing and ESG frameworks across the marketing mix. The analysis should demonstrate developed reasoning on how marketing activities contribute to the circular economy e.g. through design for reuse, ethical sourcing and transparent communication and how these are influenced by stakeholder expectations and regulatory standards. Students should analyse the benefits such as brand loyalty, innovation and efficiency gains, as well as challenges such as financial costs, implementation barriers and stakeholder scepticism associated with sustainable marketing. They should reference relevant frameworks such as the UN SDGs, ISO 14021 or the CMA Green Claims Code to support their analysis. Students should also assess at least one instance where responsible marketing has improved brand reputation and one where poor ESG alignment or greenwashing has caused reputational damage.

For pass standard, students will provide clear and structured explanations of responsible marketing and ESG practices used by a selected organisation. They will explain how environmental, social and governance considerations influence specific elements of the marketing mix, for example, sustainable packaging, transparent pricing, ethical advertising and reduced logistics impact. Their explanations should include descriptions of positive actions e.g. use of renewable materials, ethical labour sourcing, inclusive representation

and the challenges or limitations of these, for example higher costs, supply chain complexity and consumer scepticism. Students should demonstrate awareness of the risks of greenwashing by providing examples of unclear or misleading sustainability claims, even if these are brief.

Learning aim C

For distinction standard, students will produce a comprehensive, well-researched and justified responsible marketing initiative that integrates ESG principles, circular economy considerations and stakeholder needs throughout. The plan will show deep understanding of how marketing decisions can drive sustainable behaviour and minimise negative impacts across the marketing mix. Students will evaluate the potential short-term and long-term effects on both internal and external stakeholders, including customers, employees, suppliers, regulators and communities and this will be supported by data, evidence and examples. The plan will include measurable ESG and circular economy objectives e.g. waste reduction, community impact and ethical transparency, a clear risk analysis including greenwashing avoidance strategies, performance metrics for impact evaluation (KPIs) and a consideration of scalability and continuous improvement. They should come to a justified judgement in a conclusion that demonstrates originality, feasibility and a clear link between ethical marketing practice and business value creation.

For merit standard, students will produce a detailed and feasible plan for a responsible marketing initiative that directly responds to identified ESG or circular economy issues. The plan must include objectives aligned with sustainable marketing principles, budget and resource considerations, a timeline and milestones, key stakeholder engagement and communication strategies and metrics to monitor social, environmental and reputational impact. The plan will be logically structured and show evidence of research and realistic application to a selected organisation. Students will justify their choices using data or secondary research showing clear understanding of benefits and imitations.

For pass standard, students will produce a structured but straightforward plan for a responsible marketing initiative that includes some essential elements including aims, activities, stakeholders and anticipated outcomes. They must identify at least one ESG issue and one circular economy opportunity relevant to the chosen organisation and outline how marketing actions can address them e.g. promoting reuse, improving transparency, reducing waste. The plan will reference appropriate evidence sources such as sustainability reports, customer insights or competitor research. The work should show clear links between marketing activity, ESG values and responsible communication.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in *Unit 20: International Marketing*.

Unit 6: Investigate Customer Communications

Level: 3

Unit type: Pearson Set Assignment

Guided learning hours: 60

Unit in brief

Customer communications are vital to marketing. Organisations use various methods, including digital analytics, to engage different audiences.

Unit introduction

Effective customer communications underpins every successful marketing relationship. Organisations communicate not just with individual customers, but also with businesses, government bodies and communities through targeted, data-informed strategies.

In this unit, you will explore how segmentation, targeting, positioning and analytics can enhance communication effectiveness. You will evaluate how customer data and communication metrics influence marketing decisions. You will investigate the communication approaches used by business, government and not-for-profit (NFP) organisations and learn how they differ in tone, purpose and audience expectations. This will include digital and traditional communication channels as well as ethical and regulatory considerations that guide professional communication practice.

This unit will help you to progress to employment in marketing agencies or in-house marketing departments. It will also help you to move on to further study in higher education or to professional qualifications related to marketing.

Learning aims

In this unit you will:

- A** Explore segmentation, targeting, positioning and communication strategies across sectors
- B** Understand how customers and stakeholders make decisions and respond to communication
- C** Investigate a communication plan and how it uses analytics to target and engage selected customer segments.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Explore segmentation, targeting, positioning and communication strategies across sectors</p>	<p>A1 Different types of customer A2 Customer segments A3 Purpose and methods of segmenting customers A4 Purpose and methods of targeting customers A5 Purpose and methods of positioning customers</p>	<p>This unit is assessed through a Pearson Set Assignment</p>
<p>B Understand how customers and stakeholders make decisions and respond to communication</p>	<p>B1 Customer decision-making process B2 Influences on customer decision making</p>	
<p>C Investigate a communication plan and how it uses analytics to target and engage selected customer segments</p>	<p>C1 Purpose of a selected communications plan C2 Suitable targets for a selected communications plan C3 Buying decision-making process for identified segments for a selected communications plan</p>	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Explore segmentation, targeting, positioning and communication strategies across sectors [SP – CT]

A1 Different types of customer

- Customers and stakeholders in different contexts:
 - business to customer (B2C): individual customers, consumers, users, prospects
 - business to business (B2B): buyers, clients, resellers, intermediaries
 - business to government (B2G): public sector departments, agencies, procurement bodies
 - not for profit (NFP): donors, members, volunteers, beneficiaries, partners.

A2 Customer segments

- Define the meaning of customer segments in different buying contexts:
 - demographic: age, gender, education, occupation, income, ethnicity
 - geographic: region, climate, market size, population density
 - behavioural: occasion, usage, loyalty, purchasing frequency, online behaviour
 - lifecycle: stage of the buyer's journey or engagement history
 - psychographic: lifestyle, values, interests, motivations.

A3 Purpose and methods of segmenting customers

- Purpose of segmentation:
 - opportunities for effective, targeted communication
 - increased marketing efficiency and return on investment (ROI)
 - improved customer experience through personalised communication
 - benefits of segmentation for customers: relevant, tailored and meaningful messages.
 - benefits of segmentation for organisations: efficient use of resources, improved loyalty, measurable outcomes.
- Segmentation bases and analytics:
 - B2C: Use of CRM systems, social media insights and web analytics to identify and monitor customer segments
 - B2B: firmographics, needs-based, behavioural, profit-based
 - B2G: governmental level, procurement category, departmental priorities
 - NFP: donor value, fundraising behaviour, engagement frequency.

- Segmentation data sources: CRM, social media analytics, website metrics, open data for B2G.

A4 Purpose and methods of targeting customers

- Targeting: concentrating marketing on one or a few key segments consisting of the customers whose needs most closely match the product or service offering.
- Purpose of targeting: to attract new business, increase sales and boost business success.
- Methods of targeting
 - for B2B and B2C:
 - personalised marketing, rewards, loyalty schemes
 - digital re-targeting, sponsored content, priority access
 - use of data analytics to identify high-value and at-risk segments
 - for B2G: aligning communication with government frameworks and compliance requirements
 - for NFP: targeting donor or volunteer audiences with emotive and purpose-driven messages.

A5 Purpose and methods of positioning customers

- Positioning: promoting a product or service to a particular market segment to fulfil specific requirements.
- Purpose of positioning: to determine the greatest opportunity exists to increase sales, provide value to customers by meeting customer needs and expectations, to concentrate efforts on what the company does particularly well in comparison with its competitors.
- Methods of positioning:
 - differentiation through customer needs and perceptions
 - brand recognition and reputation management
 - price and quality balance
 - customer service excellence and convenience
 - communication positioning using tone, imagery, channel mix aligned with audience expectations.
- Using KPIs to evaluate positioning success: awareness scores, sentiment analysis, engagement rate, conversion rate.

Learning aim B: Understand how customers and stakeholders make and respond to communication decisions [IS - C&SI]

B1 Customer decision-making process

- Stages of the customer's decision-making process:
 - need recognition
 - information gathering
 - evaluation of alternatives
 - purchase or support decision
 - post-purchase or post engagement evaluation
 - potential repeat purchase or loyalty behaviour.
- Decision-making units (DMUs): initiators, gatekeepers, buyers, deciders, users, influencers.
- In B2G: procurement officers, evaluators, policymakers.
- In NFP: donors, trustees, beneficiaries.
- Use of behavioural data, customer feedback and performance dashboards to track decision pathways and outcomes.

B2 Influences on customer decision making

- Individual influences: purchasing power, group influence, preferences, social proof, emotional factors.
- Organisational influences: business objectives, budgets, culture, attitude to risk, availability of data.
- External influences: economic climate, technology, competitors, regulations.
- Online influences: o product/service reviews, social media sentiment, search results, user experience design.
- Offline influences: personal recommendations, in-store experience, Corporate Social responsibility (CSR) and Public Relations (PR) activity.
- Communication feedback loops:
 - continuous monitoring of engagement metrics: open rates, click-throughs, dwell time
 - social listening and sentiment analysis
 - use of analytics platforms to refine messaging.

Learning aim C: Investigate a communication plan and how it uses analytics to target and engage selected customer segments [SP - CT]

C1 Purpose of a selected communications plan

- Customer acquisition or retention.
- New product/service launch.
- Public awareness or behavioural change campaign.
- Donor engagement or community initiative.
- Policy or procurement communication.

C2 Suitable targets for a selected communications plan

- Selected target segments based on business, customer data, communication objectives.
- Evaluating the suitability of segmentation bases using analytics insights.
- Considering the needs of new and existing customers, donors, or government stakeholders.
- Aligning channel choice and tone with the target audience's media behaviour and expectations.

C3 Buying decision-making process for identified segments for a selected communications plan

- Mapping the decision-making journey for chosen segments.
- Communication touchpoints and key influencers at each stage.
- Using analytics to measure effectiveness: reach, engagement, conversion sentiment, Return On Investment (ROI).
- Presenting recommendations for improving future communication using data-driven insights.

Assessment criteria

Learning aim A: Explore segmentation, targeting, positioning and communication strategies across sectors

Learning aim B: Understand how customers and stakeholders make decisions and respond to communications

Pass	Merit	Distinction
A.P1 Explain different types and methods of segmentation, targeting, positioning and communication in different business contexts	A.M1 Analyse methods of segmentation, targeting, positioning and communication strategy across customer contexts using data examples in different business contexts	AB.D1 Evaluate the effectiveness of segmentation, targeting, positioning and communication strategies using analytics and feedback from different business contexts
B.P2 Explain the stages of the customer and stakeholder decision-making in different business contexts B.P3 Explain the influences of customer and stakeholder decision-making in different business contexts	B.M2 Analyse how communication affects decisions made using qualitative and quantitative data in different business contexts	AB.D2 Evaluate how data-informed communication drives engagement and behavioural outcomes in different business contexts

Learning aim C: Investigate a communication plan and how it uses analytics to target and engage selected customer segments

Pass	Merit	Distinction
C.P4 Explain suitable segments and communication approaches for a selected communications plan	C.M3 Assess the stages and influences using analytics for a selected communications plan	C.D3 Evaluate the significance and impact of a communications plan using data-driven evidence and stakeholder feedback

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I
MY – PGS	EL – PRS	IS – C&SI *	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for Pearson Set Assignment (PSA)

Pearson sets the assignment for the assessment of this unit.

The PSA will take 9 hours to complete.

The PSA will be marked by centres and verified by Pearson.

The PSA will be valid for the lifetime of this qualification.

Assessing the PSA

You will make assessment decisions for the PSA using the assessment criteria provided.

The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on PSAs. There is also further information on our website.

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aims A and B

For distinction standard, students will draw on varied information sources to evaluate the effectiveness of segmentation, targeting, positioning and communication strategies for a range of customers and at least four different buying contexts (B2B, B2C, B2G and NFP). They will show a critical understanding of how data and analytics inform these strategies and influence communication effectiveness. Students will make a judgement on the interrelationship between segmentation, targeting, positioning and communication approaches and on how customer insights and communication performance e.g. engagement, reach, sentiment, ROI, influence decision-making and outcomes in different contexts. They will demonstrate developed reasoning by connecting customer behaviour, decision-making stages and communication responses, supported by qualitative and quantitative evidence e.g. campaign analytics, feedback and case studies.

For merit standard, students will present a methodical and detailed analysis of the relationship between segmentation, targeting, positioning and communication strategies for a range of customers and different buying contexts (B2C, B2B, B2G, NFP). They will analyse how communication methods, message tone and media channels influence customer and stakeholder decision-making at different stages. They will integrate analytical insights such as customer data, social media metrics or feedback results to support their reasoning. They will demonstrate understanding of how communication performance data can inform adjustments to targeting and message design to improve engagement and impact.

For pass standard, students will describe and give examples of different segmentation, targeting, positioning and communication methods used for at least two types of customers in one or more buying contexts (B2C, B2B, B2G, NFP). They will explain the stages of customer or stakeholder decision-making and explain key influences, including communication factors such as advertising, social media, word of mouth and reputation. Their explanations will show understanding of how communication affects customer decisions and how organisations use different approaches to engage different audiences.

Learning aim C

For distinction standard, students will make a supported and well-reasoned judgement on the significance and impact of communication strategies within their selected communications plan. They will evaluate how analytics and feedback evidence can be used to assess and improve communication performance, showing an ability to interpret metrics e.g. engagement rate, conversion rate, donor retention and awareness lift. They will use insights from customer data to justify communication choices and demonstrate how communication effectiveness can be improved across B2C, B2B, B2G or NFP contexts. The evaluation will demonstrate clear, logical reasoning supported by qualitative and quantitative evidence.

For merit standard, students will select and justify one relevant customer or stakeholder segment for a communication plan and will assess how communication decisions and channels support engagement objectives. They will draw on analytics concepts and tools e.g. performance dashboards and audience data, to support their analysis. The response will show awareness of how communication can be adapted based on data insights and customer response patterns. They will demonstrate understanding of how effective communication strategies can be aligned to organisational goals such as acquisition, retention, awareness or advocacy.

For pass standard, students will describe two suitable customer or stakeholder segments and explain the purpose and structure of a communication plan for a given theme. They will explain the stages of the decision-making process and outline how communication can influence customer or stakeholder behaviour at each stage. They will explain basic measures of communication performance e.g. response rate, engagement, feedback and show an understanding of how these indicators reflect communication effectiveness.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 3: Generating Customer Loyalty
- Unit 4: Branding Products and Services.

Unit 7: Digital Marketing

Level: 3

Unit type: Pearson Set Assignment

Guided learning hours: 60

Unit in brief

This unit covers modern digital marketing methods, showing how businesses use online tools and data to reach and retain customers, improve visibility, and gain an edge. It includes social media, content creation, analytics, AI personalisation, and influencer marketing.

Unit introduction

Digital marketing is used by organisations of every size, across all sectors and in every country. Advances in technology and constant online connectivity allow businesses to instantly reach customers, personalise communication, gather real-time feedback, and adapt products to meet evolving needs. Customers actively engage with digital marketing, which has had impact and shaped a wide range of tools such as social media platforms, search engines, mobile apps, websites, AI-driven recommendations, influencer campaigns, and emails. This change in environment has been driven by automation, data analytics, and emerging trends like sustainability messaging and immersive technologies, although traditional marketing still has value for audiences without digital access.

In this unit, you will understand the key concepts within contemporary digital marketing, including its impact on customer behaviour, the role of data and analytics, and the effective use of digital tools and content.

This unit will help you to progress to employment in the digital marketing industry. It will also help you to move on to further study in higher education or to professional qualifications related to marketing.

Learning aims

In this unit you will:

- A** Explore the evolving nature of digital marketing activities over time
- B** Explore the use of digital marketing tools to engage with key customer segments
- C** Review various content options for the development of digital marketing tools.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Explore the evolving nature of digital marketing activities over time	A1 Principles of digital marketing A2 Evolution of digital techniques A3 Social media engagement with different customers A4 Digital technology changing customer behaviour	This unit is assessed through a Pearson Set Assignment
B Explore the use of digital marketing tools to engage with key customer segments	B1 Digital marketing toolbox B2 How digital marketing tools can be used with a range of different customers	
C Review various content options for the development of digital marketing tools	C1 Different content options for digital marketing tools C2 Producing successful digital marketing content	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Explore the evolving nature of digital marketing activities over time [SP - CT]

A1 Principles of digital marketing

- Choice of organisation
 - background including size, type, range of products and services, competitors, customer base, internal and external stakeholders and key customer segment.
- Integration with traditional marketing.
- Contribution to organisation goals, such as:
 - opportunities
 - online visibility
 - improving customer acquisition costs, and revenue
 - use of metrics e.g. engagement rates, click-throughs, dwell time, and conversions
- 7Ps: product, price, place, promotion, people, physical evidence and processes.
- Agile delivery:
 - what customers want and what competitors are doing change constantly
 - personalising delivery of the right message to the right people at the right time.
- Factors driving customer behaviour, such as:
 - improved technology
 - AI-powered personalisation
 - influence of social media communities and creators.
- Legal and ethical issues in digital marketing, such as:
 - data protection legislation
 - safeguarding data
 - electronic communications regulations
 - deceptive marketing practices
 - accessibility.

A2 Evolution of digital techniques

- Digital advances and changes in marketing activities, such as:
 - smartphones and 5G connectivity
 - voice search and smart speakers
 - wearable computing, such as smart watches, wearable cameras
 - AI-driven tools and Chatbots

- apps and mobile-first platforms
- real-time analytics and predictive insights
- Internet of Things (IoT) and connected devices
- automation
- analytics
- augmented Reality (AR), Virtual Reality (VR) and immersive experience.
- Evolution of digital marketing, for example:
 - growth of social media marketing
 - data-led personalisation
 - online interaction, such as immersive and AI-powered platforms
 - stories, interactive engagement and live streaming
 - search engine optimisation (SEO)
 - AI and answer engine optimisation
 - intent-based search
 - conversational keyword analysis
 - search marketing (SEM)
 - pay per click (PPC)
 - online advertising, such as display adverts on websites
 - affiliate marketing
 - voice and visual search optimisation
 - referrals
 - digital display and immersive advertising (AR/VR)
 - purpose and functions of online marketing platforms, such as
 - online auction sites and third-party websites, comparison websites, intermediary websites, crowdfunding systems and crowdsourcing, review platforms, growth of online transactions, social media in customer buying and selling
 - website marketing
 - ecommerce and organisation websites
 - blogs, vlogs, podcasts
 - dynamic, real-time content
 - user automated pop-ups
 - live chats and immersive shopping tools
 - email marketing
 - automated, behaviour-triggered email
 - dynamic content and advanced messaging
 - interactive newsletters and gamified content.

A3 Social media engagement with different customers

- Customers' motivation for using social media platforms.
- Advantages and disadvantages of social media platforms.
- Use of social media platforms to communicate with customers.

A4 Digital technology changing customer behaviour

- Customer acquisition – predictive analytics, chatbots, influencers.
- Moving into new markets.
- Generating sales – omnichannel promos.
- New product development, such as:
 - creating new products and trend tracking online
 - insights by monitoring online data.
- Launching new products.
- Customer segmentation, e.g. based on interests and behaviour.
- Brand awareness and management.
- Customer service.
- Adapting to customer behaviour, for example:
 - online customer journey and online communities
 - second screening and digital behavioural changes
 - showrooming – where customers look in store but buy online
 - webrooming – where customers look online but buy in store
 - using intermediaries, e.g. third-party portals to access the goods or services
 - online research, e.g. searching for the organisation, looking at staff profiles online, checking online activity
 - increased consumer online power, for example:
 - online campaigns
 - reviews and comments
 - online complaining
 - social media campaign groups.

Learning aim B: Explore the use of digital marketing tools to target key customer segments**B1 Digital marketing toolbox**

- Elements of the digital marketing toolbox including:
 - email
 - websites
 - online PR

- search engine optimisation
- blogs, podcasts
- social networks
- online advertising.

B2 How digital marketing tools can be used with a range of different customers

- Advantages and disadvantages of digital marketing tools, such as:
 - online working and upskilling staff
 - cost
 - time
 - materials and resources, e.g. software and hardware
 - opportunities for automation
 - audience reach
 - response mechanisms legal and ethical considerations
 - legal and ethical considerations.
- Opportunities and threats of using digital tools.
- Use of the tools in different customer contexts to meet set objectives for example:
 - business to business (B2B)
 - business to customer (B2C)
 - not for profit (NfP).

Learning aim C: Review different content options for the development of digital marketing tools [SP - CT]

C1 Different content options for digital marketing tools

- Digital marketing content formats, such as:
 - text
 - images
 - animated GIFS
 - interactive content
 - videos sound.

C2 Producing successful digital marketing content

- Role of customer in content creation.
- User-generated content.
- Product reviews.
- Online feedback.

Assessment criteria

Learning aim A: Explore the evolving nature of digital marketing activities over time

Pass	Merit	Distinction
<p>A.P1 Explain how marketing activities have changed as a result of evolving digital technology over time in a selected organisation.</p> <p>A.P2 Describe how evolving digital technology, including social media, has changed the behaviour of the target key customer segment in a selected organisation. [IS – C&SI]</p>	<p>A.M1 Assess the impact of evolving digital technology and social media, on marketing activities, including how this has changed the behaviour of the target key customer segment in a selected organisation.</p>	<p>A.D1 Evaluate the impact of evolving digital technology and social media on marketing activities, including how this has changed the behaviour of the target key customer segment in a selected organisation.</p>

Learning aim B: Explore the use of digital marketing tools to target key customer segments

Learning aim C: Review different content options for the development of digital marketing tools

Pass	Merit	Distinction
<p>B.P3 Describe how digital marketing tools could be used to target a key customer segment in a selected organisation.</p> <p>B.P4 Describe the advantages and disadvantages of the digital marketing tools used to target a key customer segment in a selected organisation. [IS – C&SI]</p>	<p>B.M2 Analyse how digital marketing tools could be used to target a key customer segment in a selected organisation.</p>	<p>BC.D2 Evaluate different content options and the use of digital marketing tools to target a key customer segment.</p>
<p>C.P5 Explain how different content options could be developed for use within the digital marketing tools used to target a key customer segment in a selected organisation.</p> <p>C.P6 Describe the steps involved in developing the different content options that could be used within the digital marketing tools used to target a key customer segment in a selected organisation. [IS – C&SI]</p>	<p>C.M3 Assess the different content options, including the steps involved in developing these, for use within the digital marketing tools used to target a key customer segment in a selected organisation.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I
MY – PGS	EL – PRS	IS – C&SI ✓	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for Pearson Set Assignment (PSA)

Pearson sets the assignment for the assessment of this unit.

The PSA will take 9 hours to complete.

The PSA will be marked by centres and verified by Pearson.

The PSA will be valid for the lifetime of this qualification.

Assessing the PSA

You will make assessment decisions for the PSA using the assessment criteria provided.

The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on PSAs. There is also further information on our website.

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students will consider various different impacts of evolving technologies and social media on the marketing activities of an organisation they have selected. This will include the advantages and disadvantages of the different evolving digital technologies and the social media for the organisation's marketing activities. Students will come to a judgement supported by evidence which will often be in the form of a conclusion.

For merit standard, students will give careful consideration to the various different impacts that evolving digital technology and social media have on the marketing activities of an organisation of their choice and identify which are the most important or relevant. They will make a judgement on the importance of these impacts and come to a supported conclusion as to how this has changed the behaviour of the selected organisation's key customer segment.

For pass standard, students will give a background to their selected organisation including size, type, range of products and services, competitors, customer base, internal and external stakeholders and key customer segment. They will describe the different platforms available to the selected organisation and explain how marketing activities have changed over time due to evolving digital technology in an organisation of their choice and expand this with appropriate justifications. They will give a clear account of how the evolving digital technology, including social media, has changed the behaviour of the target key customer segment for their selected organisation.

Learning aims B and C

For distinction standard, students will consider the various content options for use within the digital marketing tools for their selected organisation as above that are used to target a key customer segment. They will consider the strengths and weaknesses of these content options and tools and come to a judgement supported by evidence, justifying the most appropriate selection, in the form of a conclusion.

For merit standard, students will consider how the digital marketing tools could be used to target a selected key customer segment in their selected organisation, as above. They will identify which are the most relevant and make links to the steps involved in developing these different content options. They will consider different content options and make a judgement on the most appropriate content options for the key customer segment.

For pass standard, students will give an account of how at least three different digital marketing tools could be used to target a key customer segment in their selected organisation and a clear valid account of the advantages and disadvantages of the digital marketing tools used to target this key customer segment. They will identify and expand this to explain how at least two different content options could be developed for use within the digital marketing tools used to target a key customer segment in their selected organisation. They will give a clear account of the steps involved in developing the different content options that could be developed for use within the digital marketing tools used to target a key customer segment in their selected organisation.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 17: Creatives Marketing.

Unit 8: Artificial Intelligence in Marketing

Level: 3

Unit type: Pearson Set Assignment

Guided learning hours: 60

Unit in brief

The unit explores the transformative role of Artificial Intelligence (AI), especially generative AI and marketing analytics in shaping modern marketing strategies. Students will develop knowledge of key concepts such as AI-powered tools, data-driven decision making, and automation, providing a foundation for further study or specialist roles in digital marketing.

Unit introduction

Artificial Intelligence (AI) is revolutionising how marketers understand, reach and influence audiences. Modern AI systems including machine learning algorithms, predictive analysis and generative AI models enable businesses to analyse complex data sets, automate decision making and produce personalised content at scale. From chatbots that provide instant customer support to algorithms that predict consumer behaviour, AI is at the heart of modern marketing strategies. This unit introduces you to the fundamental concepts of AI and explores how these technologies are applied within the marketing industry to create value for both businesses and consumers.

Throughout this unit, you will examine the different types of AI tools and techniques used in marketing, such as machine learning, natural language processing, and predictive analytics. You will learn how these technologies enable businesses to analyse large volumes of data, segment audiences, and deliver targeted campaigns. By understanding these applications, you will gain insight into how AI helps organisations improve customer engagement, increase efficiency and achieve competitive advantage in a rapidly evolving digital landscape.

By the end of this unit, you will be able to evaluate the benefits and challenges of using AI in marketing, including ethical considerations such as data privacy and bias. You will also develop practical skills by exploring real-world examples and case studies, preparing you for future roles in marketing, digital strategy, or technology-driven business environments.

Learning aims

In this unit you will:

- A** Understand the principles and role of Artificial Intelligence, generative AI and analytics in marketing.
- B** Examine and apply AI, generative and analytical tools to marketing activities
- C** Explore the benefits, challenges and ethical considerations of using AI and analytics in marketing.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Understand the principles and role of Artificial Intelligence, generative AI and analytics in marketing	A1 Definition and scope of AI A2 Core and generative AI technologies A3 AI and analytics in the marketing context A4 Trends and developments	This unit is assessed through a Pearson Set Assignment
B Examine and apply AI, generative and analytical tools to marketing activities	B1 Segmentation, targeting and personalisation B2 Generative content and automation B3 Marketing activity analytics and optimisation B4 Practical use of AI tools	
C Explore the benefits, challenges, and ethical considerations of using AI and analytics in marketing	C1 Benefits C2 Challenges C3 Ethical considerations C4 Impact on workforce and governance	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand the principles and role of Artificial Intelligence, generative AI and analytics in marketing

A1 Definition and scope of AI [SP - CT]

- Understanding artificial intelligence as the simulation of human intelligence processes by machines. Key differences between AI from traditional computing: adaptability, learning, autonomy.
- Historical development of AI and its growing influence on marketing:
 - from early conceptual theories in the 1950s and the first AI programs to contemporary breakthroughs in deep learning and big data analytics
 - milestones in AI adoption for business, such as the introduction of expert systems in the 1980s and the growth of AI-driven analytics in marketing strategies.
- Increasing role of data analytics and AI-assisted insight generation:
 - from basic automation to personalisation:
 - customer insights
 - predictive modelling.

A2 Core and generative AI technologies

- Machine Learning: Predictive modelling, clustering, forecasting Natural Language Processing (NLP):
 - chatbots, automated customer support, sentiment analysis to interpret consumer feedback.
- Generative AI: creating marketing content: text, images, videos, design using models.
- Recommendation systems and predictive analytics: leveraging historical data to forecast consumer behaviour and anticipate market trends; powering personalised product suggestions and content delivery to boost engagement.
- Computer vision:
 - utilising image recognition for visual search
 - product tagging
 - enhanced customer experiences.
- Data mining:
 - extracting actionable insights from large volumes of structured and unstructured marketing data.

- Robotic Process Automation (RPA):
 - automating repetitive tasks such as data entry
 - campaign scheduling
 - market research.
- Speech recognition:
 - enabling voice-based interactions and powering voice search capabilities in marketing platforms.
- Augmented Reality (AR) and Virtual Reality (VR):
 - enhancing product visualisation and interactive customer experiences.
- Generative AI:
 - creating dynamic marketing content such as images, videos and copy tailored to audience preferences.

A3 AI and analytics in the marketing context

- Strategic integration of AI into the marketing mix (product, price, place, promotion):
 - role of marketing analytics in understanding customer journeys and optimising campaigns
 - using generative AI to enhance creative output based on analytical insights
 - linking AI generated content to real-time performance data and audience segmentation.
- Campaign and content management:
 - enhancing campaign targeting and audience segmentation with AI-driven analysis
 - streamlining content strategy through AI-based topic and trend discovery.
- Performance and customer experience:
 - optimising marketing spend and Return on Investment (ROI) using predictive analytics
 - improving customer service with intelligent chatbots and virtual assistants
 - utilising AI for real-time competitor benchmarking and market intelligence.

A4 Trends and developments

- Emerging technologies and platforms:
 - generative AI for automated and optimised content creation
 - AI-driven voice search for enhanced consumer interaction
 - Augmented Reality (AR) and Virtual Reality (VR) integration to create immersive marketing experiences
 - growth of multimodal generative AI: text, image, video
 - use of real-time analytics for adaptive marketing.
- Advanced customer-facing strategies:
 - hyper-personalisation that leverages deep learning insights
 - advanced customer journey mapping for improved engagement

- real-time personalisation across all digital channels
- AI-powered visual merchandising and product display.
- Advanced operational and governance strategies:
 - AI-enabled influencer identification and campaign management
 - ethical AI considerations and governance: explainability and transparency in analytics
 - AI-based fraud detection in digital advertising and analytics
 - automated content curation and advanced recommendation systems.
- Emerging roles for marketers combining creativity and data science.

Learning aim B: Examine and apply AI, generative and analytical tools to marketing activities [SP - C&I]

B1 Segmentation, targeting and personalisation

- Audience analysis and profiling:
 - using AI for audience profiling and predictive modelling
 - behavioural and demographic segmentation through data analysis
 - cross-channel data integration for a unified customer view and more accurate targeting
 - sentiment analysis for understanding customer attitudes and adjusting segmentation accordingly
 - strategic targeting and retention
 - automated lead scoring to prioritise sales and marketing efforts on high-potential prospects
 - churn prediction models to identify customers at risk of leaving and enable proactive retention strategies
 - geo-targeting to deliver location-based offers and messaging.
- Personalised content and advertising:
 - recommendation engines (e.g. Amazon, Netflix) that suggest products or content
 - dynamic content and programmatic advertising for real-time message adjustment
 - automated copywriting tools generating personalised ad and website text.
- Enhanced customer interaction and insight:
 - AI-powered social listening tools to monitor brand mentions and sentiment
 - visual search capabilities allowing customers to find products using photos
 - influencer identification and campaign management using predictive analytics.

B2 Generative content and automation

- AI powered content creation for blogs, ads and social media.
- Programmatic advertising and dynamic creative optimisation.
- Chatbots, virtual assistants and conversational marketing.

B3 Marketing activity analytics and optimisation

- Performance measurement and testing:
 - real-time analytics dashboards to measure engagement and ROI
 - automated A/B testing and continuous improvement of creative content AI in social media ad targeting and performance tracking.
 - Strategic and financial optimisation
 - predictive budget allocation based on historical data and campaign goals
 - sentiment analysis to gauge audience reaction and adapt strategies
 - forecasting market trends to proactively adjust campaign direction
 - multichannel synchronisation for consistent branding and messaging.

B4 Practical use of AI tools

- Using approved AI tools.
- Integrating generative AI outputs with analytical insights for marketing activities.
- Presenting findings and results visually, using dashboards and reports.

Learning aim C: Explore the benefits, challenges, and ethical considerations of using AI and analytics in marketing [SP - C&I]

C1 Benefits

- Operational and financial gains:
 - increased efficiency and cost reduction through automation of repetitive tasks
 - faster response times to market changes and customer inquiries
 - predictive budget allocation and optimisation of marketing spend for better ROI.
- Strategic and customer-facing gains:
 - enhanced customer experience and engagement through personalisation at scale
 - improved customer insights and better segmentation from advanced data analysis
 - higher conversion rates and more accurate prediction of trends and consumer behaviour
 - continuous optimisation of decision making and marketing activity performance through analytics
 - enhanced creative productivity using generative AI.

C2 Challenges

- Technical and financial hurdles:
 - high implementation costs and technical complexity
 - data quality bias in algorithms and integration issues
 - interoperability challenges with existing systems and platforms
 - difficulty in measuring and attributing AI-driven results accurately
 - dependence on third-party vendors and external expertise.

- Organisational and human hurdles:
 - technical complexity and workforce skills gap requiring continual learning and adaptation
 - resistance to change within organisations
 - potential for unintended consequences due to automated decision-making.

C3 Ethical considerations

- Data, privacy, and consumer protection:
 - data privacy and security (e.g. GDPR compliance)
 - informed consent and responsible data usage
 - potential for manipulation or exploitation of consumer behaviour.
- Accountability, fairness and trust:
 - algorithmic bias and fairness in AI algorithms and generative models
 - transparency and accountability in AI systems
 - intellectual property concerns with AI-generated content
 - maintaining brand trust and public perception
 - ensuring accessibility and avoiding digital exclusion
 - authenticity of AI-generative content and consumer trust.

C4 Impact on workforce and governance

- Evolution of roles and skills:
 - automation of tasks versus enhancement of human creativity
 - new strategic and analytical roles and skills required in marketing
 - the need for reskilling and upskilling initiatives to bridge knowledge gaps.
- Changes to the work environment:
 - potential for job displacement due to increased automation
 - enhanced collaboration between human teams and AI systems
 - changing expectations for adaptability and tech literacy
 - impacts on job satisfaction and workplace culture.
- Governmental and legal oversight:
 - overview of key laws and guidelines affecting AI in marketing
 - international differences in AI regulation (e.g. EU AI Act, US frameworks)
 - enforcement mechanisms and penalties for non-compliance
 - emerging trends in legislative approaches to AI.
- Industry and corporate governance:
 - industry standards and best practices for responsible AI
 - ethical codes of conduct for AI developers and marketers
 - the role of industry bodies and watchdogs in monitoring AI use.

Assessment criteria

Learning aim A: Understand the principles and role of Artificial Intelligence, generative AI and analytics in marketing

Pass	Merit	Distinction
<p>A.P1 Explain the principles and technologies of AI and generative AI in a selected marketing context.</p> <p>A.P2 Describe how AI and analytics are applied to achieve marketing objectives in a selected marketing context.</p>	<p>A.M1 Analyse how AI and analytics contribute to performance and innovation in a selected marketing context.</p>	<p>A.D1 Evaluate the impact of AI and analytics on strategy, creativity and customer experience in a selected marketing context.</p>

Learning aim B: Examine and apply AI, generative and analytical tools to marketing activities

Pass	Merit	Distinction
<p>B.P3 Use AI and analytics tools to carry out defined marketing tasks. [EL – SRS]</p>	<p>B.M2 Analyse the effectiveness of AI-driven marketing tasks and content</p>	<p>B.D2 Justify the application of AI and analytics in a specific marketing task, not required.</p>

Learning aim C: Explore the benefits, challenges, and ethical considerations of using AI and analytics in marketing

Pass	Merit	Distinction
<p>C.P4 Describe the benefits and challenges of AI in a selected marketing context.</p> <p>C.P5 Explain the ethical considerations of AI in selected marketing context.</p>	<p>C.M3 Analyse how the benefits, challenges and ethics of using AI interact in a selected marketing context.</p>	<p>C.D3 Evaluate the overall impact of AI and generative technologies on marketing practice and society, providing justified conclusions.</p>

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS ✓	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for Pearson Set Assignment (PSA)

Pearson sets the assignment for the assessment of this unit.

The PSA will take 9 hours to complete.

The PSA will be marked by centres and verified by Pearson.

The PSA will be valid for the lifetime of this qualification.

Assessing the PSA

You will make assessment decisions for the PSA using the assessment criteria provided.

The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on PSAs. There is also further information on our website.

Further information for teachers and assessors

Resource requirements

For this unit, students must have access to:

- Software and accounts (education-friendly, low/no cost options)
 - Use institution-approved accounts; avoid student personal accounts where possible.
- Analytics and dashboards
 - Google Analytics 4 (GA4) demo account (for hands-on analysis without using real student data).
- Marketing and automation
 - Mailchimp (free tier) or HubSpot (education programme) for simple segmentation/automation demonstrations.
- AI tools (institution-approved)
 - Microsoft Copilot/Bing Copilot or another approved generative AI assistant for ideation, persona generation, and content variants (used ethically and with clear policy).
 - Creative tools: Canva/Adobe Express (for AI-aided creative variants and asset management).
- Productivity & VLE
 - Microsoft 365/Teams/OneDrive or Google Workspace for collaboration, version control, and evidence capture.
 - Moodle/Teams Class Notebook/Google Classroom for assignment briefs, rubrics and submission trails.
 - **Note:** Lock down billing/spend on any ad platform. Use demo/simulator modes and teacher-owned sandbox accounts. Pre-create “fake brand” assets to avoid using live client data.
- Datasets (privacy-safe and age appropriate).
- Public/demo datasets only – no personal or live customer data.
 - Examples: GA4 Demo Store data (e-commerce journeys, channels, attribution basics). UCI Bank Marketing, Online Retail II, or Kaggle marketing campaigns datasets (for segmentation, RFM, or churn propensity exercises). ONS open data (UK retail, inflation, demographics) to contextualise insights.
 - Ensure files are anonymised, documented and stable for re-use in assessments.

Learning aim A

For distinction standard, students must undertake a comprehensive evaluation of how AI, including generative AI and marketing analytics, has transformed marketing activities and customer experience. Students should demonstrate an in-depth understanding of how these technologies contribute to creativity and insight generation. This should involve a discussion of the transformative benefits and the inherent limitations or risks associated with AI adoption, including ethical and strategic risks. Students must consider the extent to which generative AI supports innovation, for example automated content creation and dynamic personalisation, and how analytics tools enable data-driven decisions and performance optimisation. Students are expected to reference specific examples, such as the use of AI-driven personalisation in global retail brands or the deployment of predictive analytics for targeted advertising campaigns. Their evaluation should weigh improvements in efficiency, accuracy and customer insights against challenges such as data privacy concerns or potential biases in algorithms. Demonstrating critical thinking, students should present a well-reasoned judgement on the overall significance of AI in shaping modern marketing, considering both immediate and long-term effects.

For merit standard, students must analyse how AI technologies, including generative AI and analytical tools, contribute to achieving marketing objectives. This should include a clear analysis of the relationships between AI capabilities such as chatbots, recommendation systems or automated campaign optimisers, and marketing outcomes like increased sales, enhanced customer engagement or streamlined operations. Students should provide examples, for example comparing the effectiveness of AI-powered dynamic pricing versus traditional pricing strategies, and discussing the contexts in which one approach might be more suitable. Their analysis should also acknowledge the impact of practical considerations, such as data quality, integration challenges, or scalability on how AI can optimise marketing activity performance and support decision making.

For pass standard, students must explain the principles and technologies that underpin Artificial Intelligence and its role in a marketing context. This involves explaining generative AI, for example content creation, personalisation and analytical applications, for example data-driven insights and predictive modelling. Students must provide examples showing how AI contributes to marketing activities such as customer segmentation, activity management and performance analysis.

Learning aim B

For distinction standard, students must justify the application of AI and analytical tools in a specific marketing context, constructing a compelling and evidence-based argument supported by examples and data. This should show why selected AI and analytics tools are appropriate for the context, drawing on data analysis, relevant industry benchmarks, or case studies. Their justification should consider creative and strategic outcomes such as improved targeting, automated personalisation or measurable ROI. Students should address potential alternatives – such as manual segmentation or traditional marketing methods – and clearly explain why AI offers superior value. Where possible, students should anticipate possible challenges such as integration issues, staff training needs, ethical concerns, data quality or system integration, and propose realistic solutions.

For merit standard, students must analyse the effectiveness of AI-driven strategies and tools used in the marketing context. This involves interpreting data, performance metrics and creative outputs generated through AI or analytics tools. Students should assess which aspects of the AI-driven approach contributed most to the success of the marketing activity, such as improved engagement rates, higher conversion or increased creative efficiency. The analysis should link data interpretation with marketing objectives and provide evidence-based conclusions.

For pass standard, students must use AI and analytics tools to complete marketing tasks and demonstrate how these tools were applied to the marketing context. This could include generating creative assets using generative AI, building simple audience segments using predictive analytics or presenting marketing activity performance through visual dashboards. The evidence should show that students can operate relevant tools safely and effectively, and communicate outputs clearly in a marketing context.

Learning aim C

For distinction standard, students must evaluate the overall impact of AI, including generative AI and analytics, on marketing practice and society, providing a justified and evidence-based conclusion. Building on their analysis of the interconnected factors, students must form a well-reasoned judgement on the significance of AI. Their evaluation should weigh the transformative potential for businesses, for example increased efficiency, insight and creativity, against the significant ethical risks such as bias, data misuse and misinformation. They must support their arguments with well-chosen examples or case studies and consider the short- and long-term effects of AI adoption, making a substantiated judgement on whether the benefits ultimately outweigh the challenges and risks in modern marketing.

For merit standard, students must analyse the relationship between the benefits, challenges and ethical issues of using AI and analytics in marketing. For example, a student might analyse how the benefit of enhanced customer targeting can create an ethical challenge around data privacy, or how the challenge of poor data quality can lead to biased and unfair marketing outcomes. The analysis should use relevant examples to illustrate how these factors create complex trade-offs for businesses, demonstrating a clear understanding of their practical implications.

For pass standard, students must describe the main benefits, challenges and ethical considerations of using AI in marketing. They will describe advantages such as improved personalisation and automation, as well as challenges such as high implementation costs and technical complexity. In addition, they must identify key ethical considerations, such as the importance of data privacy or the risk of algorithmic bias. The evidence should demonstrate a foundational awareness of the key commercial, operational and ethical factors that influence the use of AI in a marketing context.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 6: Investigating Customer Communications
- Unit 7: Investigating Digital Marketing
- Unit 10: Developing a Digital Marketing Campaign
- Unit 18: Market Research.

Unit 9: Develop a Digital Marketing Campaign

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

In this unit you will learn how to enable students to plan, design, and develop a digital marketing campaign that meets specific business objectives and engages a target audience effectively. It aims to provide practical experience in using digital tools and techniques to create, implement, and evaluate a campaign in a real or simulated environment.

Unit introduction

In today's fast-paced digital economy, businesses rely heavily on well-planned and executed digital marketing campaigns to reach and engage their target audiences. This unit introduces students to the essential principles and practices involved in designing and developing a digital marketing campaign that meets specific business objectives. It explores the importance of understanding customer needs, selecting appropriate digital channels, and creating compelling content that resonates with the intended audience.

You will gain insight into the full campaign lifecycle, from initial research and planning through to implementation and evaluation. You will explore how to set clear objectives, define key performance indicators (KPIs), and allocate resources effectively. The unit also covers the use of digital tools and platforms, such as social media, email marketing, and search engine optimisation (SEO), to ensure campaigns are both impactful and measurable.

By completing this unit, students will develop practical skills in creating a digital marketing campaign for a given business scenario. They will learn how to apply creative and analytical thinking to produce campaigns that are innovative, cost-effective and aligned with organisational goals. This experience will prepare students for roles in marketing, digital strategy, and content creation, as well as providing a strong foundation for further study in marketing and business disciplines.

Learning aims

In this unit you will:

- A** Understand the principles and objectives of digital marketing campaigns
- B** Plan a digital marketing campaign to meet specific business goals
- C** Develop and implement a digital marketing campaign using appropriate tools and techniques.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Understand the principles and objectives of digital marketing campaigns	A1 Purpose of digital marketing campaigns A2 Key components of a digital marketing campaign A3 Campaign objectives and KPIs A4 Benefits and limitations of digital campaigns	Students understand and can explain the purpose and key components of digital marketing campaigns. This may be demonstrated through a written report, presentation, or digital portfolio.
B Plan a digital marketing campaign to meet specific business goals	B1 Research and analysis B2 Campaign planning B3 Channel selection B4 Risk assessment	Students should create a concise campaign plan including objectives, target audience, selected digital channels, budget, and timeline, supported by research on market trends and audience behaviour.
C Develop and implement a digital marketing campaign using appropriate tools and techniques	C1 Content creation C2 Digital tools and platforms C3 Campaign implementation C4 Compliance and ethics	Assessment should include practical evidence, such as examples of social media content, email templates, or adverts, and show their use with digital tools. Students should present screenshots, mock-ups, or demonstrations.

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand the principles and objectives of digital marketing campaigns [EL - CL]

A1 Purpose of digital marketing campaigns

- Role in achieving business objectives (brand awareness, lead generation, sales).
- Differences between digital and traditional campaigns.
- Ability to reach targeted audiences through data-driven insights.
- Measurability and real-time tracking of campaign performance.
- Cost-effectiveness compared to traditional marketing channels.
- Potential for personalisation and customer engagement.
- Flexibility to adapt strategies based on analytics and feedback.
- Leveraging multi-channel approaches for maximum impact.

A2 Key components of a digital marketing campaign

- Target audience and customer personas.
- Value proposition and messaging.
- Digital channels:
 - social media
 - email
 - SEO
 - PPC
 - content marketing.
- Budget allocation and resource planning.
- Content creation strategies.
- Timeline and campaign scheduling.
- Integration with offline marketing efforts.
- Compliance with legal and ethical standards.
- Monitoring tools and analytics platforms.
- The use of Artificial Intelligence (AI) within creating digital marketing and the ethics around using AI.
- Stakeholder roles and responsibilities.

A3 Campaign objectives and KPIs

- SMART objectives for campaigns.
- Common KPIs:
 - click-through rate
 - conversion rate
 - engagement metrics
 - cost per acquisition (CPA)
 - return on ad spend (ROAS)
 - impression share
 - bounce rate
 - customer lifetime value (CLV)
 - lead generation volume
 - social shares and mentions.

A4 Benefits and limitations of digital campaigns

- Advantages:
 - cost-effectiveness
 - measurability
 - wide reach
 - real-time analytics
 - targeted audience engagement
 - flexibility in campaign adjustment.
- Challenges:
 - ad fatigue
 - privacy concerns
 - algorithm changes
 - increasing competition
 - potential for negative feedback
 - dependence on technology and platforms.

Learning aim B: Plan a digital marketing campaign to meet specific business goals [SP - C&I]

B1 Research and analysis

- Market research:
 - competitor analysis
 - trend identification
 - industry benchmarking

- consumer sentiment assessment.
- Audience research:
 - demographics
 - behaviours
 - psychographics
 - segmentation and persona creation
 - media consumption patterns
 - audience pain points and motivations.

B2 Campaign planning

- Setting objectives aligned with business goals.
- Budgeting and resource allocation.
- Timeline creation and scheduling.
- Defining key performance indicators (KPIs) to measure campaign success.
- Outlining campaign messaging and creative direction.
- Identifying required assets and content types for each stage of the campaign.
- Assigning responsibilities across the marketing team and stakeholders.
- Establishing a system for tracking and reporting progress.
- Planning for contingency and risk management scenarios.
- Scheduling regular checkpoints for reviewing and optimising campaign activities.

B3 Channel selection

- Choosing appropriate platforms based on audience and objectives.
- Integration of multiple channels for consistency.
- Assessing the strengths and limitations of each digital channel, including social media, email, paid search, and display advertising.
- Aligning channel choices with content formats and campaign goals.
- Evaluating emerging platforms for innovative outreach opportunities.
- Analysing historical campaign data to inform channel selection.
- Balancing organic and paid strategies for optimal reach.
- Considering audience platform preferences and engagement patterns.
- Ensuring seamless user experience across all selected channels.

B4 Risk assessment

- Identifying potential risks such as budget overruns, low engagement, or reputational damage.
- Analysing competitor activity and market trends to anticipate external threats.
- Assessing legal and ethical considerations, including data privacy and advertising standards.

- Monitoring campaign performance in real time to detect issues early.
- Developing contingency plans for platform outages or negative feedback.
- Ensuring compliance with regulations and industry best practices.
- Establishing protocols for crisis communication and rapid response.

Learning aim C: Develop and implement a digital marketing campaign using appropriate tools and techniques [SP - C&I]

C1 Content creation

- Writing engaging copy for ads, emails, and social posts.
- Visual content creation:
 - images
 - videos
 - infographics.
- Developing storyboards for video campaigns.
- Designing banners and promotional graphics for websites and social media.
- Crafting compelling calls-to-action to drive audience response.
- Adapting content formats to suit different channels and devices.
- Collaborating with influencers for authentic audience reach.
- Scheduling content to align with key marketing moments and campaigns.
- Curating user-generated content to foster community engagement.

C2 Digital tools and platforms

- Social media management tools (Hootsuite, Buffer).
- Email marketing platforms (Mailchimp, HubSpot).
- Analytics tools (Google Analytics, platform insights).
- Content management systems (WordPress, Squarespace).
- Graphic design software (Canva, Adobe Creative Suite).
- Customer relationship management (CRM) tools (Salesforce, Zoho CRM).
- Automation tools for scheduling and reporting.
- Online advertising platforms (Google Ads, Facebook Ads Manager).
- Survey and feedback tools (SurveyMonkey, Google Forms) for audience insights.

C3 Campaign implementation

- Scheduling and publishing content across multiple channels.
- Applying SEO and paid advertising strategies.
- Monitoring campaign progress and making real-time adjustments.
- Coordinating with design and content teams for brand consistency.
- Managing budgets and allocating resources efficiently.

- Engaging with audiences through comments and direct messages.
- Tracking key performance indicators (KPIs) to measure success.
- Reporting and documenting results for future campaign improvement.

C4 Compliance and ethics

- GDPR and data protection.
- Ethical considerations in targeting and messaging.
- Transparency in data collection and usage.
- Obtaining informed consent for email subscriptions and cookies.
- Ensuring accessibility for users with disabilities.
- Complying with advertising standards and avoiding misleading claims.
- Respecting intellectual property rights when sharing content.
- Safeguarding customer privacy in all communications.

Assessment criteria

Learning aim A: Understand the principles and objectives of digital marketing campaigns

Pass	Merit	Distinction
A.P1 Explain the purpose of digital marketing campaigns and their role in achieving business objectives.	A.M1 Analyse the key components of a successful digital marketing campaign and how they contribute to meeting objectives.	A.D1 Evaluate the benefits and limitations of digital marketing campaigns, using examples to support your judgement.

Learning aim B: Plan a digital marketing campaign to meet specific business goals

Pass	Merit	Distinction
B.P2 Produce a plan for a digital marketing campaign that meets given business objectives.	B.M2 Justify the choice of digital channels, tools, and techniques used in the campaign plan.	B.D2 Provide a detailed rationale for the campaign plan, supported by research and evidence.

Learning aim C: Develop and implement a digital marketing campaign using appropriate tools and techniques

Pass	Merit	Distinction
C.P3 Create campaign content and demonstrate how it would be implemented using digital tools.	C.M3 Apply appropriate digital marketing techniques to ensure the campaign is engaging and aligned with objectives.	C.D3 Produce a professional and fully integrated campaign that demonstrates creativity and technical accuracy.

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL *	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of three summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.M1, A.D1)

Learning aim: B (B.P2, B.M2, B.D2)

Learning aim: C (C.P3, C.M3, C.D3)

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must conduct a thorough evaluation of the overall effectiveness of digital marketing campaigns. This involves assessing the strategic impact of chosen channels, content, and targeting methods, and weighing their strengths and weaknesses in relation to stated objectives. Students should support their analysis using relevant real-world examples or case studies, referencing data such as conversion rates, engagement metrics, and ROI. Their evaluation should consider factors like audience response, brand positioning, and market trends, and propose alternative approaches where campaigns fell short. A well-reasoned conclusion should be presented, summarising the campaign's success and identifying key lessons for future initiatives.

For merit standard, students are expected to go beyond basic analysis by examining how the main components of a digital marketing campaign – such as audience segmentation, selection of digital channels, content strategy, and key performance indicators (KPIs) – combine to drive campaign outcomes. This includes analysing the interactions between these elements, describing the planning and execution process, and showing how each contributes to successful results. Students should provide examples of how adjustments in one area (like channel choice or messaging) might affect other aspects, and reference relevant industry practices or benchmarks to support their insights.

For pass standard, students need to clearly explain the core reasons businesses implement digital marketing campaigns, such as increasing brand awareness, generating leads, or boosting sales. Their response should illustrate how specific campaign activities – like targeted advertising, social media engagement, or email outreach – help businesses achieve these objectives. Additionally, students should outline the basic steps involved in designing and running a campaign, describing how setting goals, identifying audiences, and measuring outcomes play a role in campaign success. Simple visual aids or summary tables may be included to clarify processes and demonstrate understanding.

Learning aim B

For distinction standard, students must provide a comprehensive and well-justified rationale for their campaign plan. This should be grounded in robust research into market trends, competitor activities, and audience behaviours, with clear references to primary and secondary sources. Students should explain how their findings have shaped the overall strategy, the selection of channels, and the proposed messaging. The rationale should address potential risks, opportunities, and ethical considerations, demonstrating a sophisticated understanding of the digital marketing landscape. Additionally, students should propose contingency plans for unforeseen challenges and discuss how the plan aligns with wider business objectives.

For merit standard, students must offer thoughtful justification for their selection of specific channels and tools, explicitly linking each choice to the target audience, campaign objectives, and anticipated outcomes. This should include an analysis of the strengths and limitations of each digital platform or tool, consideration of factors like cost-effectiveness, accessibility, and audience engagement, and reference to relevant case studies or industry examples. Students should describe how their chosen channels will interact to create a cohesive customer journey, and how their selection supports both short-term and long-term campaign goals.

For pass standard, students must develop a clear and structured campaign plan that sets out defined objectives, identifies the target audience in some detail, and lists the chosen digital channels, budget allocations, and a realistic timeline. The plan should present a step-by-step approach to campaign roll-out, specifying key tasks, responsibilities, and deadlines. Additionally, students should briefly outline how each element of the plan contributes to achieving the overall goals and provide a rationale for key decisions such as audience segmentation, content types, and scheduling. Where possible, simple visual aids such as Gantt charts or flow diagrams should be included to enhance clarity and organisation.

Learning aim C

For distinction standard, students must create a digital marketing campaign that is not only professional and visually appealing but also demonstrates originality and innovation in approach. The campaign should integrate a coherent message across all selected digital platforms, ensuring consistency in branding, tone of voice, and visual identity. Additionally, students must show an advanced understanding of technical accuracy by effectively utilising tools such as website builders, email marketing software, and analytics platforms. The campaign should include interactive or engaging content—such as polls, live streams, or personalised communications—demonstrating a sophisticated blend of creativity and strategic thinking.

For merit standard, students must ensure their campaign applies a range of appropriate digital marketing techniques. This includes, but is not limited to, search engine optimisation (SEO) to increase website visibility, targeted online advertising (such as pay-per-click or social media ads), and automation tools for scheduling and customer segmentation. Students need to justify their choice of these techniques, explicitly linking them to the campaign objectives and audience needs. The plan should also indicate how these techniques will be monitored and measured for effectiveness, referencing relevant key performance indicators (KPIs).

For pass standard, students must produce a selection of campaign content, such as sample social media posts, email marketing templates, or digital advertisements, that reflect the intended messaging and visual style. They must outline how these materials would be scheduled, published, or distributed using specific digital tools or platforms. Basic planning documents should be provided, including a content calendar or timeline, and clear instructions for deployment. Students should also describe how they would monitor basic metrics (like post reach or open rates) to ensure the content is being delivered as planned.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 6: Investigating Customer Communications
- Unit 7: Investigating Digital Marketing
- Unit 10: Developing a Digital Marketing Campaign
- Unit 18: Market Research.

Unit 10: Test and Review a Digital Marketing Campaign

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

In this unit students will learn how to test campaigns before full implementation. It focuses on campaign planning, testing strategies, analysing performance data, and making improvements to achieve effective, results-driven digital marketing outcomes. Learners can use the Digital Marketing Campaign developed in *Unit 9: Develop a Digital Marketing Campaign*.

Unit introduction

Digital marketing campaigns are essential for businesses to connect with their audiences in a competitive online environment. This unit focuses on the practical process of testing and reviewing a digital marketing campaign to ensure it meets business objectives and delivers measurable results. Students will explore how to create campaign content, select appropriate digital tools, and apply strategies that align with organisational goals and target audience needs.

The unit emphasises the importance of testing campaigns before full implementation to identify potential issues and optimise performance. You will gain experience in using analytics tools and feedback mechanisms to monitor campaign effectiveness during the testing phase. You will also learn how to interpret data and make informed decisions to refine and improve campaign outcomes.

Finally, students will review the overall success of their campaign by comparing results against objectives and key performance indicators (KPIs). They will evaluate what worked well, what could be improved, and provide recommendations for future campaigns. By completing this unit, students will develop practical skills in campaign management and critical evaluation, preparing them for roles in digital marketing and related fields.

Learning aims

In this unit you will:

- A** Understand the process and purpose of developing and testing a digital marketing campaign
- B** Test the functionality and effectiveness of a digital marketing campaign
- C** Review the performance of a digital marketing campaign.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Understand the process and purpose of developing and testing a digital marketing campaign	A1 Purpose of campaign development and testing A2 Stages of campaign development A3 Testing principles A4 Benefits of testing	Assessment should focus on students explaining the purpose and stages of campaign development and testing. This could be through a report, presentation, or portfolio.
B Test the functionality and effectiveness of a digital marketing campaign	B1 Testing methods B2 Tools for testing B3 Performance metrics B4 Optimisation	Assessment should include practical evidence of campaign testing using suitable tools. Students must show tests like A/B testing or usability checks, and present results clearly.
C Review the performance of a digital marketing campaign	C1 Evaluation techniques C2 Identifying strengths and weaknesses C3 Recommendations C4 Reporting	Students should assess campaign performance using suitable data, such as engagement or conversion rates. Evidence may be an evaluation report or presentation highlighting strengths and weaknesses.

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand the process and purpose of developing and testing a digital marketing campaign

A1 Purpose of campaign development and testing

- Why campaigns need structured development stages.
- Importance of testing for optimisation and risk reduction.
- Setting clear objectives and measurable outcomes for each campaign phase.
- Adapting strategies to suit target audience preferences and market trends.
- Ensuring compliance with data protection and advertising regulations.
- Allocating resources efficiently to maximise return on investment.
- Using performance insights to drive continuous improvement.

A2 Stages of campaign development

- Research and planning.
- Content creation and asset design.
- Audience segmentation and targeting strategies.
- Channel selection and media planning.
- Compliance with current legal and ethical guidelines.
- Budget allocation and resource scheduling.
- Testing, implementation, and review.
- Monitoring campaign metrics and Key Performance Indicators (KPI).
- Ongoing optimisation and refinement based on data insights.

A3 Testing principles

- A/B testing and multivariate testing.
- Usability testing for landing pages and ads.
- Testing across devices and platforms.
- Performance testing for website speed and responsiveness.
- Accessibility testing to ensure content is usable by all audiences.
- Split testing for email subject lines and content variations.
- Load testing to anticipate traffic spikes.
- Tracking and analysing attribution for conversions.

A4 Benefits of testing

- Identifying weaknesses before launch.
- Improving engagement and conversion rates.
- Reducing wasted spend.
- Ensuring messages resonate with target audiences.
- Increasing reliability of campaign performance data.
- Minimising unexpected technical issues.
- Supporting continuous optimisation through actionable insights.
- Strengthening return on investment (ROI).
- Facilitating evidence-based decision making.

Learning aim B: Test the functionality and effectiveness of a digital marketing campaign

B1 Testing methods

- A/B testing for headlines, images, and CTAs.
- Split testing for email subject lines and ad variations.
- Multivariate testing to assess the impact of multiple variables on campaign performance.
- Usability testing to ensure user-friendly design and navigation across digital assets.
- Pre-launch testing to identify and resolve technical issues before live deployment.
- Post-campaign analysis to evaluate results and inform future strategy.
- Audience segmentation tests to refine targeting and messaging for different user groups.
- Load and performance testing to confirm stability under varying traffic conditions.

B2 Tools for testing

- Google Optimize, Meta Ads Manager, Mailchimp testing features.
- Analytics dashboards for performance tracking.
- Google Tag Manager for implementing and managing tracking codes.
- Hotjar and Crazy Egg for visualising user behaviour through heatmaps and session recordings.
- Social media insights tools such as Facebook Insights, Instagram Analytics, and Twitter Analytics.
- Survey and feedback platforms like SurveyMonkey or Typeform for collecting user insights.
- Utm.io and campaign URL builders to track custom campaign performance.
- Conversion rate optimisation (CRO) platforms like Optimizely and VWO.
- Data visualisation tools such as Google Data Studio and Tableau for custom reporting.

B3 Performance metrics

- Engagement rates, bounce rates, conversion rates.
- Heatmaps and click tracking for user behaviour.
- Cost per acquisition (CPA) and return on ad spend (ROAS).
- Click-through rates (CTR) on ads, emails, and social posts.
- Customer lifetime value (CLV) and retention rates.
- Impressions and reach across various platforms.
- Session duration and pages per visit.
- Lead generation volume and quality.
- Attribution modelling to understand channel impact.
- Social shares, comments, and sentiment analysis.

B4 Optimisation

- Making data-driven adjustments to improve results.
- Iterative testing for continuous improvement.
- Personalising content and offers based on audience segmentation.
- Refining targeting parameters to reach high-value users.
- Streamlining user flows to reduce friction and boost conversions.
- Enhancing page load speeds and mobile responsiveness.
- Incorporating feedback from user testing and customer support interactions.
- Adjusting budget allocation to prioritise top-performing channels.

Learning aim C: Review the performance of a digital marketing campaign [SP - C&I]

C1 Evaluation techniques

- Comparing actual results against objectives and KPIs.
- Analysing data from analytics tools and reports.
- Conducting A/B and multivariate testing to pinpoint effective elements.
- Compiling qualitative insights from user surveys or interviews.
- Reviewing customer journey mapping to identify drop-off points.
- Assessing the performance of individual creative assets (e.g., emails, ads, landing pages).
- Monitoring trends over time to spot emerging patterns or shifts in user behaviour.
- Evaluating the effectiveness of different channels and campaign components in contributing to overall goals.
- Cross-referencing campaign data with industry benchmarks for context.

C2 Identifying strengths and weaknesses

- What worked well and why.
- Areas for improvement and missed opportunities.
- Unexpected outcomes or anomalies in the data.
- User feedback and sentiment analysis.
- Channel-specific performance insights.
- Comparison of performance across different audience segments.
- Assessment of return on investment (ROI) and cost-effectiveness.
- Insights from competitor benchmarking.
- Impacts of timing, frequency, or seasonality on results.

C3 Recommendations

- Evidence-based suggestions for future campaigns.
- Considering emerging trends and new technologies.
- Setting clear action plans for implementation.
- Prioritising recommendations based on potential impact and feasibility.
- Identifying additional training or resource needs.
- Outlining strategies for monitoring future campaign adjustments.
- Addressing potential risks and proposing mitigation tactics.

C4 Reporting

- Creating clear, professional evaluation reports.
- Presenting findings to stakeholders.
- Summarising key insights and lessons learned from the campaign analysis.
- Including visual representations of data, such as graphs or charts, to enhance understanding.
- Providing actionable recommendations supported by evidence.
- Ensuring reports are accessible and tailored to the needs of different audiences.
- Documenting any challenges encountered during the campaign and how they were addressed.

Assessment criteria

Learning aim A: Understand the process and purpose of developing and testing a digital marketing campaign

Pass	Merit	Distinction
A.P1 Explain the purpose of developing and testing a digital marketing campaign and outline the key stages involved.	A.M1 Analyse why testing is important and how it contributes to the success of a digital marketing campaign.	A.D1 Evaluate the benefits and limitations of different testing methods, using examples to support your judgement.

Learning aim B: Test the functionality and effectiveness of a digital marketing campaign

Pass	Merit	Distinction
B.P2 Carry out basic testing of a given campaign to check functionality and identify any issues.	B.M2 Analyse the results of testing and explain how the findings can be used to improve the campaign.	B.D2 Make and implement justified adjustments to optimise the campaign based on testing results.

Learning aim C: Review the performance of a digital marketing campaign

Pass	Merit	Distinction
C.P3 Review the campaign's performance against its objectives using available data.	C.M3 Analyse the strengths and weaknesses of the campaign, supported by relevant metrics and evidence.	C.D3 Provide justified recommendations for improving future campaigns, based on an evaluation of the results. [SP – CT]

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT ✓
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of three summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.M1, A.D1)

Learning aim: B (B.P2, B.M2, B.D2)

Learning aim: C (C.P3, C.M3, C.D3)

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must offer an evaluation of various testing methodologies used in campaign development, such as A/B testing, multivariate testing, and usability testing. They should examine the specific contexts in which each method is most effective, detailing factors such as sample size, testing duration, and variables manipulated. Students are expected to provide real or simulated examples – such as running parallel versions of a landing page to determine which call-to-action generates the highest conversion rate or conducting user journey mapping sessions to uncover navigation pain points. Their evaluation should include a balanced discussion of strengths and limitations, addressing considerations like data comparisons, resource constraints, and the potential impact on campaign outcomes.

For merit standard, students must present a thorough analysis of the significance of testing within the lifecycle of a digital marketing campaign. This includes explaining how systematic testing processes help organisations identify technical issues, refine content effectiveness, and mitigate risks prior to campaign launch. They should use specific case studies or past campaign data to demonstrate how testing has led to measurable improvements, such as increased engagement rates or reduced bounce rates. The analysis should describe how insights from testing are translated into actionable recommendations, and how iterative testing cycles can be used to continuously enhance campaign performance.

For pass standard, students must clearly explain the rationale behind testing in the context of digital marketing, outlining the primary objectives such as verifying technical functionality, ensuring content displays correctly across different platforms, and confirming that user interactions meet intended goals. They should describe the principal stages of campaign testing, including initial planning, content review, technical checks (such as verifying that links work and images load correctly), user feedback collection, and final adjustments. Brief examples should be provided to illustrate each stage – for instance, checking a social media advert for compatibility on both desktop and mobile devices, or reviewing email templates for formatting consistency before distribution.

Learning aim B

For distinction standard, students must go beyond simply suggesting adjustments; they should make thorough, realistic, and evidence-based recommendations for refining the campaign based on the outcomes of various tests conducted. This includes a detailed discussion of how each change directly addresses issues uncovered during testing – such as improving user navigation, optimising content layout for different devices, or enhancing call-to-action effectiveness. Students should justify each modification with reference to specific test data, showing clear links between findings and proposed improvements, and explaining the anticipated impact on user engagement, conversion rates, or overall campaign success.

For merit standard, students are expected to offer a robust analysis of the testing results, providing a thoughtful interpretation of both quantitative data (such as click rates, engagement metrics, or error frequencies) and qualitative feedback (including user comments or usability observations). They should identify key trends or recurring issues revealed by the data, explain their significance, and discuss how these insights can inform practical and targeted campaign enhancements. Additionally, students should explore alternative solutions and justify why particular improvements were chosen over others.

For pass standard, students must demonstrate a systematic approach to campaign testing, recording and summarising the steps taken to verify key functionalities – such as ensuring all hyperlinks work as intended, layouts display correctly across varied screen sizes, and content loads properly on different browsers or devices. They should clearly describe any problems encountered during this process, such as broken links, formatting errors, or slow load times, and document these issues in a structured manner. Where possible, students should also reflect briefly on how these issues might affect user experience and campaign outcomes, even if only at a basic level.

Learning aim C

For distinction standard, students must make realistic and well-justified recommendations for improving future campaigns, ensuring their suggestions are specifically linked to the findings from their evaluation. This should include an analysis of user feedback, campaign results, and industry benchmarks, alongside a reasoned discussion of how each proposed change could enhance outcomes such as engagement, conversion rates, or brand reputation.

For merit standard, students must provide a more detailed analysis by clearly identifying both the strengths and weaknesses of the campaign. Their evaluation should reference quantitative data – such as open rates, click-through rates, and social media metrics – as well as qualitative insights from user comments or stakeholder feedback. Students should support their points with concrete examples from analytics reports or case studies, explaining the impact of each aspect on overall campaign performance.

For pass standard, students must review how effectively the campaign met its stated objectives, using accessible performance data including engagement rates, click-through rates, conversions, or other relevant metrics. The review should mention any deviations from expected results, summarise key findings in a structured way, and highlight any technical or content issues identified during campaign delivery.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 6: Investigating Customer Communications
- Unit 7: Investigating Digital Marketing
- Unit 9: Developing a Digital Marketing Campaign
- Unit 18: Market Research.

Unit 11: Develop Customer Communications

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to equip students with the skills to develop effective communication strategies. It focuses on planning, creating tailored content, and presenting it to customers through various channels, aiming to enhance engagement, review and make recommendations for improvement and support business objectives. Students can use the communications plan developed in *Unit 6: Investigate Customer Communications*.

Unit introduction

Effective customer communication is at the heart of successful marketing and business relationships. This unit introduces students to the principles and practices of planning, creating, and presenting customer communications that meet organisational objectives and customer needs. It explores the importance of clear, consistent, and professional messaging across different channels, ensuring that communications reflect brand values and build positive customer experiences.

You will develop the skills to plan communications by identifying the purpose, audience, and appropriate format for different situations. You will learn how to create engaging and accurate content that is tailored to the target audience, while considering tone, style, and legal or ethical requirements. The unit also covers the use of digital tools and platforms for delivering communications effectively in a modern business environment.

Finally, students will gain experience in presenting customer communications in a professional manner, whether through written documents, digital media, or verbal presentations. They will review the effectiveness of their communications and make improvements based on feedback. By completing this unit, students will be equipped with practical skills that are essential for roles in marketing, customer service, and business communication.

Learning aims

In this unit you will:

- A** Understand the principles and purpose of effective customer communications
- B** Create professional customer communications using appropriate formats and styles
- C** Present and review customer communications to ensure effectiveness and professionalism.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Understand the principles and purpose of effective customer communications	A1 Purpose of customer communications A2 Principles of effective communication A3 Types of customer communication A4 Legal and ethical considerations A5 Impact of poor communication	Assessment should test students' understanding of the purpose and principles of customer communications. This can be demonstrated in a brief report, guide, or presentation, using examples and explaining the importance of clarity, tone, and consistency.
B Create professional customer communications using appropriate formats and styles	B1 Writing skills B2 Design and layout B3 Digital tools B4 Adapting style B5 Proofreading and quality checks	Assessment should require students to produce customer communications in various formats, demonstrating clarity, accuracy, professionalism, and appropriate style.
C Present and review customer communications to ensure effectiveness and professionalism	C1 Presentation methods C2 Gathering feedback C3 Evaluating effectiveness C4 Making improvements	Students should present their work in formats like live presentations, videos, or digital submissions and collect feedback. They need to assess how well their communication met its goals, noting strengths and weaknesses.

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand the principles and purpose of effective customer communications

A1 Purpose of customer communications

- Building relationships, trust and loyalty.
- Supporting business objectives (sales, retention, brand image).
- Facilitating problem resolution and customer support.
- Gathering customer insights and feedback to improve products or services.
- Enhancing customer satisfaction and positive experiences.
- Ensuring compliance with organisational standards and legal requirements.

A2 Principles of effective communication

- Clarity, accuracy, tone and consistency.
- Adapting communication to audience needs and context.
- Active listening and providing appropriate responses.
- Using positive language to build rapport.
- Ensuring timely and relevant communication.
- Respecting cultural differences and diversity in communication styles.
- Maintaining confidentiality where required.

A3 Types of customer communication

- Written:
 - emails
 - letters
 - reports
 - brochures
 - newsletters.
- Digital:
 - social media
 - chatbots
 - SMS
 - websites
 - mobile apps
 - customer portals.

- Verbal:
 - phone calls
 - video conferencing
 - face-to-face meetings
 - presentations.
- Non-verbal:
 - body language
 - gestures
 - visual aids
 - signage.
- Automated:
 - autoresponders
 - recorded messages
 - FAQs
 - interactive voice response (IVR) systems.
- Offline/traditional:
 - print ads
 - billboards
 - TV and radio ads
 - direct mail.
- Integrated communications:
 - coordinating communication channels to deliver a consistent message to customers
 - aligning communication methods to create a cohesive brand experience across all touchpoints
 - increasing brand recognition, builds customer loyalty, improves efficiency.

A4 Legal and ethical considerations

- GDPR and data protection.
- Honesty, transparency and avoiding misleading information.
- Ensuring accessibility for all customers, including those with disabilities.
- Respecting customer confidentiality and privacy.
- Compliance with advertising standards and consumer protection laws.
- Avoiding discrimination and using inclusive language in all communications.
- Providing clear terms and conditions for products and services.

A5 Impact of poor communication

- Customer dissatisfaction.
- Reputational damage.
- Loss of business.
- Increased complaints and negative feedback.
- Decreased customer loyalty and retention.
- Misunderstandings leading to errors or disputes.
- Lower staff morale and productivity.
- Potential legal or regulatory consequences.

Learning aim B: Create professional customer communications using appropriate formats and styles [SP - C&I]

B1 Writing skills

- Clear, concise and grammatically correct language.
- Structuring messages logically.
- Choosing vocabulary appropriate to the audience and purpose.
- Ensuring accuracy and relevance of information.
- Adapting sentence length and complexity for readability.
- Incorporating persuasive or informative techniques as required.
- Using active voice for clarity and engagement.
- Respecting tone and formality guidelines set by the organisation.

B2 Design and layout

- Use of headings, bullet points and visuals for clarity.
- Applying consistent formatting to enhance readability.
- Balancing text and whitespace to avoid clutter.
- Integrating logos and branding elements where appropriate.
- Aligning layout with organisational templates or guidelines.

B3 Digital tools

- Word processors, email platforms, and design software (e.g., Canva).
- Collaboration tools such as shared drives and cloud-based document editors.
- Project management systems for tracking communication drafts and approvals.
- Templates and macros to ensure consistency and efficiency.
- The use of AI (e.g., Copilot).
- Secure file transfer and storage solutions to protect sensitive content.

B4 Adapting style

- Formal vs. informal tone.
- Cultural sensitivity and inclusive language.
- Adapting messaging for different audiences or platforms.
- Using plain language for clarity and accessibility.
- Adjusting sentence structure and vocabulary to suit the communication context.
- Ensuring consistency in voice across multiple documents and channels.

B5 Proofreading and quality checks

- Checking for errors, tone, and compliance with brand guidelines.
- Verifying spelling, grammar, and punctuation accuracy.
- Ensuring factual accuracy and the correct use of data or terminology.
- Reviewing formatting for clarity and professionalism.
- Ensuring that all attachments, links, or references work properly.
- Double-checking that confidential information is handled according to policy.
- Seeking a second opinion or peer review for important documents.

Learning aim C: Present and review customer communications to ensure effectiveness and professionalism [SP - C&I]**C1 Presentation methods**

- Delivering written communications professionally (email etiquette, formatting).
- Presenting verbally or via video conferencing.
- Utilising visual aids such as slides, infographics, or charts to enhance clarity.
- Adapting presentation style to suit the audience—formal for stakeholders, conversational for customers.
- Ensuring accessibility by providing alternative text for visuals and using clear, simple language.
- Practising active listening and allowing time for questions during presentations.
- Using recorded video messages or webinars for consistent communication delivery.
- Providing printed handouts or digital summaries to support understanding and retention.

C2 Gathering feedback

- Peer review, customer feedback and supervisor input.
- Collecting feedback through online surveys and questionnaires.
- Organising focus groups for in-depth opinions and suggestions.
- Monitoring social media for customer comments and reactions.
- Encouraging feedback during live presentations or webinars.
- Using suggestion boxes or digital platforms for anonymous input.

C3 Evaluating effectiveness

- Did the communication achieve its purpose?
- Measuring engagement and response.
- Tracking open rates, views, or attendance for digital communications.
- Assessing retention of key messages through follow-up surveys or quizzes.
- Reviewing customer behaviour changes post-communication.
- Identifying areas of confusion or misunderstanding in feedback.
- How to use references.
- Comparing outcomes against predefined objectives or benchmarks.

C4 Making improvements

- Revising communication strategies based on feedback received.
- Implementing changes to address identified areas of confusion or misunderstanding.
- Ensuring message clarity and consistency across all channels.
- Adapting content format and delivery methods according to audience preferences.
- Utilising data analytics to refine future communications.
- Encouraging ongoing dialogue to foster continuous improvement.

Assessment criteria

Learning aim A: Understand the principles and purpose of effective customer communications

Pass	Merit	Distinction
A.P1 Explain the purpose of customer communications and outline the principles of effective communication. [MY – PGS]	A.M1 Analyse why effective communication is important for building customer relationships and achieving business objectives.	A.D1 Evaluate the impact of poor communication on customer experience and business performance, using examples to support your points.

Learning aim B: Create professional customer communications using appropriate formats and styles

Pass	Merit	Distinction
B.P2 Produce a plan for customer communications that identifies the purpose, audience, and appropriate format.	B.M2 Justify the choice of communication methods and formats in relation to the audience and business objectives. [SP – PS]	B.D2 Provide a detailed rationale for the communication plan, supported by research and evidence of best practice.

Learning aim C: Present and review customer communications to ensure effectiveness and professionalism

Pass	Merit	Distinction
C.P3 Present customer communications in an appropriate format and gather feedback on their effectiveness. [MY – PGS]	C.M3 Analyse the strengths and weaknesses of the communications based on feedback and performance measures.	C.D3 Provide justified recommendations for improving future communications, supported by evidence from the review.

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC	SP – PS ✓
MY – COP	EL – SRS	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of four summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.M1, A.D1)

Learning aims: B (B.P2, B.M2, B.D2)

Learning aim: C (C.P3, C.M3, C.D3)

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must conduct a thorough evaluation of the potential consequences of poor communication within a business context. This should include specific examples such as misunderstandings that lead to customer dissatisfaction, loss of business revenue, damage to brand reputation, or breaches of confidentiality and data protection. Students are expected to use detailed case studies – either real-world or well-constructed simulations – to illustrate the negative impacts. They must draw clear links between the breakdown in communication and the resulting organisational issues.

For merit standard, students must provide a detailed analysis of how effective communication strategies directly influence customer satisfaction, promote brand loyalty, and contribute to the overall success of an organisation. This should include discussion of feedback mechanisms, the importance of adapting communication styles to suit diverse audiences, and the role of consistency and transparency in building trust. Students should reference supporting data or research to justify their analysis and highlight specific organisational outcomes such as improved customer retention or increased sales.

For pass standard, students must give a comprehensive explanation of the reasons businesses engage in communication with customers. They should cover key principles of effective communication, such as the need for clarity to avoid ambiguity, the importance of choosing an appropriate tone and language for different customer groups, and the value of maintaining consistency across multiple channels. Students should also reference common communication tools (emails, phone calls, social media, letters) and explain how these support the organisation's objectives in meeting customer needs and expectations.

Learning aim B

For distinction standard, students must demonstrate creativity and technical accuracy by crafting communications that capture attention through compelling visuals and innovative approaches while rigorously adhering to legal and ethical requirements and the use of AI. They should incorporate advanced elements, such as targeted messaging based on customer segmentation, use of multimedia or interactive features, and accessibility options for diverse audiences. Their work should be evaluated against industry benchmarks for engagement, clarity, and compliance, and students must provide a critical reflection on how these aspects enhance customer experience and safeguard organisational interests.

For merit standard, students must ensure their communications employ a tone and style that resonates with the intended audience, strictly follow brand guidelines for consistency, and are presented in a polished, professional format. They should demonstrate how their choices in style, structure, and medium contribute to heightened brand recognition and trust. Supporting their decisions with comparative examples or feedback data, students should also discuss the impact of their communication on audience engagement, retention rates, and reputation management.

For pass standard, students must produce at least two examples of customer communications – such as emails, social media posts, or letters – that are clear, accurate, and tailored to the needs of a specific audience. Each example should include a brief rationale for its format and content, explaining how it meets organisational objectives and addresses customer expectations. Additionally, students should outline the steps taken to check for errors, maintain consistency in messaging, and ensure all communications are accessible and easy to understand.

Learning aim C

For distinction standard, students must develop realistic and thoroughly researched recommendations for enhancing future communications. These recommendations should be explicitly connected to evaluation findings and supported by relevant examples, such as case studies or comparative industry data. Students are expected to consider factors like emerging communication technologies, shifts in customer expectations, and evolving legal or ethical requirements. Their suggestions should highlight how proposed improvements will contribute to measurable outcomes, such as increased customer engagement, improved satisfaction scores, or stronger brand loyalty. They should also consider how the improvements directly address any gaps or weaknesses identified in previous evaluations.

For merit standard, students must analyse feedback from multiple sources – such as engagement metrics, audience surveys, or qualitative observations – to provide a balanced assessment of what aspects of their communications were successful and which require improvement. Their analysis should be detailed, referencing specific feedback points and demonstrating an understanding of how these insights relate to organisational objectives and customer experience. Students should propose targeted adjustments, explaining how these modifications could enhance future communications. They should outline the anticipated impacts on brand perception, customer retention, or operational efficiency.

For pass standard, students must present their communications using an appropriate format – such as a professional email, digital presentation, or verbal report – and systematically gather feedback from peers, supervisors, or intended recipients. They should describe the process used for collecting and evaluating this feedback, noting any tools or methods employed, such as surveys or review checklists. Additionally, students should explain how feedback was used to identify areas for improvement and the steps taken to implement changes, ensuring that their approach supports organisational aims and contributes to ongoing development of effective customer communications.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 3: Generating Customer Loyalty
- Unit 4: Branding Products and Services
- Unit 6: Investigate Customer Communications.

Unit 12: Marketing Skills

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to equip students with practical abilities to apply core marketing principles in real business contexts. Students will develop communication, creative and analytical skills through practical application and collaborative activities.

Unit introduction

Marketing is a dynamic and competitive field that requires a combination of technical knowledge and practical skills. This unit focuses on developing the essential skills needed to work effectively in marketing roles, including communication, creativity, problem-solving, and the ability to work collaboratively. Students will explore how these skills contribute to successful marketing activities and how they can be applied in real marketing contexts.

In this unit, you will gain practical experience in applying marketing skills to a range of tasks, such as planning promotional activities, creating marketing content, and engaging with customers. You will also develop professional behaviours, such as collaboration, adaptability, and attention to detail, which are highly valued by employers in the marketing industry. The unit emphasises the importance of combining creativity with analytical thinking to deliver effective marketing solutions.

By completing this unit, students will be able to learn and demonstrate the core skills required for entry-level marketing roles and progression to higher-level study or employment. They will understand how to work as part of a team, communicate effectively with stakeholders, and use digital tools to support marketing activities. These skills will prepare students for a wide range of opportunities in marketing, advertising and other related business sectors.

Learning aims

In this unit you will:

- A** Understand the core skills and behaviours required for effective marketing activities
- B** Develop practical marketing skills through applied activities
- C** Demonstrate professional behaviours and teamwork in a marketing context
- D** Review and reflect on personal performance to improve marketing skills.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Understand the core skills and behaviours required for effective marketing activities	A1 Overview of essential marketing skills A2 Professional behaviours A3 Importance of skills and behaviours	A written report that examines how skills and behaviours impact on the success of marketing activities, using examples.
B Develop practical marketing skills through applied activities	B1 Practical marketing tasks B2 Using digital platforms B3 Applying creativity	A practical team project and portfolio of a range of marketing materials that meet a given business context or purpose.
C Demonstrate professional behaviours and teamwork in a marketing context	C1 Working collaboratively C2 Professional conduct C3 Team-based activities	Students must take an active part in the development of marketing materials and lead aspects of the project. Evidence of this such as photographic evidence, witness statements, observations and notes must be presented.
D Review and reflect on personal performance to improve marketing skills	D1 Self-assessment techniques D2 Reflective practice D3 Continuous improvement	An individual summary of the behaviours and skills demonstrated within marketing activities. A detailed personal development plan including targets to improve own marketing skills and behaviours.

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand the core skills and behaviours required for effective marketing activities

A1 Overview of essential marketing skills

- Communication:
 - verbal
 - written
 - digital.
- Creativity and innovation in marketing ideas.
- Problem solving and decision making.
- Analytical thinking and data interpretation.
- Customer focus and relationship building.
- Attention to detail and accuracy.
- Time management and organisation.
- Presentation and public speaking skills.
- Research and information gathering.
- Ability to work under pressure and meet deadlines.
- Collaboration and interpersonal skills.

A2 Professional behaviours

- Adaptability and resilience in a fast-changing environment.
- Effective written and verbal communication.
- Digital literacy and confidence with new technologies.
- Critical thinking and creative problem solving.
- Self-motivation and a proactive attitude.
- Ethical awareness and responsible conduct in marketing practices.
- Awareness of professional standards including ethical, legal and digital.
- Openness to feedback and continuous learning.

A3 Importance of skills and behaviours

- Understanding how these abilities drive successful marketing campaigns.
- Understanding employer expectations in marketing roles.
- Enhancing team collaboration and project efficiency.
- Building trust with clients and stakeholders.
- Facilitating personal career development and progression.

- Ensuring compliance with ethical and legal standards.
- Strengthening adaptability in the face of industry trends.
- Improving customer engagement and satisfaction.

Learning aim B: Develop practical marketing skills through applied activities

[EL - CL]

B1 Practical marketing tasks

- Creating social media content and posts.
- Writing promotional copy for emails or adverts.
- Designing simple marketing materials using digital tools (e.g. Canva).
- Conducting competitor analysis to inform campaign strategies.
- Researching target audiences and market trends.
- Organising and participating in promotional events or product launches.
- Collecting and presenting feedback from marketing activities.
- Assisting in preparing presentations and pitches for clients or stakeholders.
- Adhering to professional standards and legal requirements.

B2 Using digital platforms

- Social media scheduling tools.
- Basic analytics for engagement tracking.
- Managing digital advertising campaigns (e.g. Google Ads, Facebook Ads).
- Utilising email marketing platforms for targeted communications.
- Monitoring online brand reputation and responding to feedback.
- Updating and maintaining website content using content management systems (CMS).
- Collaborating through team platforms such as Slack or Microsoft Teams.
- Using online survey tools to collect customer insights.

B3 Applying creativity

- Generating ideas for campaigns.
- Adapting content for different audiences and channels.
- Designing engaging visuals and multimedia assets.
- Experimenting with new formats and storytelling techniques.
- Mind-mapping solutions to marketing challenges.
- Incorporating feedback to refine creative concepts.
- Developing unique brand messages and taglines.

Learning aim C: Demonstrate professional behaviours and teamwork in a marketing context [EL - MOL]

C1 Working collaboratively

- Roles and responsibilities in a marketing team.
- Effective communication and conflict resolution.
- Collaborating on shared documents and creative assets.
- Setting clear goals and expectations for group tasks.
- Supporting team members using constructive feedback.
- Celebrating team successes and learning from setbacks.
- Utilising individual strengths to maximise team performance.

C2 Professional conduct

- Meeting deadlines and managing workload.
- Maintaining brand consistency and quality standards.
- Encouraging open-mindedness and receptivity to new ideas.
- Recognising accountability for assigned tasks.
- Respecting diverse perspectives within the team.
- Adapting to change and embracing innovation.
- Recognising and addressing potential risks in marketing projects.

C3 Team-based activities

- Group projects to plan and deliver marketing tasks.
- Peer feedback and collaborative problem-solving.
- Role rotation to experience different responsibilities within the team.
- Mind-mapping sessions to generate innovative marketing ideas.
- Joint analysis of campaign results to identify best practices.
- Organising mock presentations to refine communication skills.
- Simulating client interactions to practise negotiation and pitching techniques.

Learning aim D: Review and reflect on personal performance to improve marketing skills [EL - CL]

D1 Self-assessment techniques

- SWOT analysis of personal skills.
- Using feedback from peers and supervisors.
- Maintaining a reflective journal to track progress over time.
- Completing self-evaluation checklists focused on marketing skills.
- Assessing own behaviours against professional standards.
- Conducting regular skills audits to identify gaps and progress.

D2 Reflective practice

- Identifying strengths and areas for improvement.
- Setting SMART goals for skill development.
- Regularly reviewing and updating personal action plans.
- Engaging in peer feedback sessions for diverse perspectives.
- Tracking achievements and milestones using digital portfolios.
- Seeking out case studies or best practice examples for inspiration.
- Reflecting on unsuccessful marketing efforts and extracting lessons learned.
- Comparing current skills against professional standards or industry benchmarks.

D3 Continuous improvement

- Building a personal development plan.
- Keeping up with trends and new tools in marketing.
- Scheduling regular self-assessment to identify growth areas.
- Attending relevant workshops and professional development events.
- Seeking mentorship from experienced marketing professionals.
- Setting measurable targets for skill advancement.
- Participating in online marketing communities and forums.
- Utilising feedback from supervisors and clients to refine approaches.
- Documenting learning progress and areas for improvement.

Assessment criteria

Learning aim A: Understand the core skills and behaviours required for effective marketing activities

Pass	Merit	Distinction
<p>A.P1 Explain the core skills required for effective marketing activities and their importance in a business context. [MY – PGS]</p>	<p>A.M1 Analyse how these skills contribute to successful marketing outcomes and why employers value them.</p>	<p>A.D1 Evaluate the impact of skills and behaviours on the success of marketing activities, using examples.</p> <p>A.D2 Evaluate the importance of marketing skills on performance and success.</p>

Learning aim B: Develop practical marketing skills through applied activities

Pass	Merit	Distinction
<p>B.P2 Carry out practical marketing activities that demonstrate the application of core marketing skills. [MY – PGS]</p>	<p>B.M2 Apply creativity and problem solving to produce marketing materials that meet given objectives.</p>	<p>B.D3 Produce marketing materials that demonstrate originality, technical accuracy, and alignment with professional standards.</p>

Learning aim C: Demonstrate professional behaviours and teamwork in a marketing context

Pass	Merit	Distinction
<p>C.P3 Work collaboratively to complete marketing tasks, showing appropriate professional behaviours. [MY – PGS]</p>	<p>C.M3 Contribute effectively to team activities, demonstrating adaptability and responsibility for allocated tasks.</p>	<p>C.D4 Take a proactive role in leading team activities, showing leadership, collaboration, initiative, and the ability to resolve challenges.</p>

Learning aim D: Review and reflect on personal performance to improve marketing skills

Pass	Merit	Distinction
<p>D.P4 Review personal performance in marketing activities, identifying strengths and areas for improvement. [MY – PGS]</p>	<p>D.M4 Analyse feedback and performance data to explain how improvements to personal performance can be made.</p>	<p>D.D4 Produce a detailed and realistic personal development plan that includes SMART targets for improving marketing skills.</p>

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL *	IS – WC	SP – CT
MY – PS&R	EL – CL *	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I
MY – PGS ✓	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of four summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.M1, A.D1)

Learning aim: B (B.P2, B.M2, B.D2)

Learning aim: C (C.P3, C.M3, C.D3)

Learning aim: D (D.P4, D.M4, D.D4)

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must thoroughly evaluate how the success of marketing activities is impacted by the skills and behaviours of those involved. Their evaluation should be supported by detailed, context-specific examples, and consider both the positive and negative impacts of skills and behaviours on success. For example they can compare an unsuccessful marketing activity to a successful one, highlighting how shortcomings in some skills or behaviours directly affect outcomes.

For merit standard, students are expected to conduct an analysis of how core marketing skills – such as problem-solving, adaptability, and creative thinking – contribute to the success of marketing activities. This analysis should reference real-world or simulated marketing projects, demonstrating the link between the application of these skills and measurable campaign results.

For pass standard, students must provide a comprehensive explanation of fundamental marketing skills, including communication, creativity and problem-solving, outlining their importance in marketing. They should reference specific instances where these skills are applied, such as drafting promotional materials, engaging customers on social media, or collaborating with team members. Additionally, students should reflect on how these skills help maintain productivity, foster collaboration, and ensure basic objectives are met within a marketing environment.

Learning aim B

For distinction standard, students must produce materials that are professional, original and technically accurate; but also thoroughly aligned with professional standards. Their work should show clear evidence of research into audience and market trends; incorporate innovative techniques or approaches; and reflect a high level of polish in both presentation and content. Materials should demonstrate strong attention to detail, from visual consistency and language choice, to compliance with legal, ethical and digital standards in marketing.

For merit standard, students must demonstrate creativity and advanced problem solving throughout their materials, addressing any challenges that arise during the creative process. Their work should clearly meet or exceed the objectives outlined in the brief, incorporating original ideas and adapting to stakeholder feedback where appropriate. Students should provide rationales for their creative choices and explain how these contribute to the effectiveness and appeal of the marketing materials.

For pass standard, students must complete a range of practical tasks, such as developing engaging social media content; writing clear and persuasive promotional copy; or designing basic marketing materials like flyers or email templates. Their materials should show an understanding of fundamental marketing principles, including clear communication, basic aesthetic considerations, and the use of appropriate channels for the intended audience. There should also be evidence of planning and adherence to set instructions or templates, demonstrating the ability to apply basic marketing skills in practice.

Learning aim C

For distinction standard, students must demonstrate outstanding leadership qualities by effectively organising team tasks, setting clear objectives, and ensuring all members understand their roles and responsibilities. They should proactively support others by offering guidance, sharing expertise, and facilitating collaboration to achieve shared goals. Additionally, students must resolve problems efficiently, using advanced communication and negotiation skills to address conflicts or obstacles. Students should then reflect on how their leadership contributed to the overall success of the marketing activities.

For merit standard, students are expected to play an active and constructive role within the team by consistently contributing ideas, engaging in discussions, and completing their assigned tasks to a high standard. They should display flexibility by adapting to unexpected changes, responding positively to feedback, and willingly taking on additional responsibilities when needed. Students must also demonstrate accountability for their work, regularly updating the team on progress and seeking opportunities to improve both team processes and outcomes.

For pass standard, students must show clear evidence of effective teamwork in marketing activities, such as participating in group meetings, collaborating to meet deadlines, and supporting the coordination of shared tasks. They should demonstrate key behaviours including punctuality, reliability and respectful communication, as well as a willingness to assist others and contribute to a positive team environment. Their involvement should help ensure the successful completion of marketing projects, even if their role is primarily supportive or operational.

Learning aim D

For distinction standard, students must create a comprehensive personal development plan that demonstrates self-awareness and strategic foresight. This plan should include clearly defined, measurable goals related to marketing skill development, such as improving advanced communication techniques, mastering digital marketing tools, or enhancing creative output. Students should detail actionable strategies to achieve these goals, specifying timelines, resources required, and methods for monitoring progress. The plan should also incorporate regular reflection points, seeking feedback from mentors or peers, and adapting strategies based on new challenges or opportunities encountered throughout their marketing journey.

For merit standard, students must thoroughly analyse feedback received from peers, supervisors or clients, identifying both strengths and areas for improvement in their marketing practice. They should clearly explain how this feedback is relevant to their role and outline specific steps they will take to address constructive criticism. Students are expected to set intermediate objectives based on this insight, such as adopting new creative methods, refining their approach to teamwork, or enhancing their problem-solving processes.

For pass standard, students must provide a basic review of their own performance in marketing activities or projects. This review should highlight key achievements, such as successfully meeting deadlines, producing effective promotional materials, or collaborating well within a team. Students should also identify at least one area where they encountered difficulty or could improve, such as time management or communication with stakeholders. The review should conclude with simple, practical ideas or intentions for future development, demonstrating a willingness to learn from experience and contribute positively to the marketing environment.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 3: Generating Customer Loyalty
- Unit 6: Investigating Customer Communications
- Unit 7: Investigating Digital Marketing
- Unit 15: Customer Immersive Experience
- Unit 16: Activating a Brand
- Unit 17: Creatives Marketing
- Unit 18: Market Research.

Unit 13: Developing a Marketing Campaign and Promotion Campaign

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to equip students with the knowledge and skills to plan effective promotional activities. The unit explores promotional methods, target audience engagement, campaign planning and evaluation, enabling students to create marketing campaigns that support business objectives and drive results.

Unit introduction

Promotion is a key element of the marketing mix and plays a vital role in influencing customer behaviour and driving business success. This unit introduces students to the principles of promotion and how it can be used to communicate value, build brand awareness, and encourage customer engagement. Students will explore the different types of promotional methods, both traditional and digital, and understand how these can be combined to create an integrated marketing campaign.

In this unit, you will develop the skills needed to plan and design a marketing campaign that meets specific business objectives. You will research target audiences, select appropriate promotional techniques, and create campaign materials that align with brand identity and organisational goals. You will also consider factors such as budgeting, scheduling, and legal or ethical requirements when planning the campaign.

By completing this unit, students will gain practical experience in using promotional tools and techniques to develop a marketing campaign from concept to pitch. They will learn how to apply creativity and strategic thinking to produce campaigns that are effective, professional, and measurable. These skills will prepare students for roles in marketing, advertising, and related business sectors, as well as providing a strong foundation for further study.

Learning aims

In this unit you will:

- A** Understand the role and purpose of promotion within the marketing mix
- B** Examine the methods and techniques used in promotional activities
- C** Plan and develop a marketing campaign that incorporates appropriate promotional strategies
- D** Present and justify a marketing campaign proposal to meet business objectives.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Understand the role and purpose of promotion within the marketing mix</p>	<p>A1 Purpose of promotion A2 Promotion in the marketing mix A3 Types of promotion A4 Benefits and limitations</p>	<p>Students should explain how promotion within the marketing mix supports business objectives, influences customer behaviour, and helps achieve marketing goals. They should also assess how effective different types of promotion are in meeting business aims.</p>
<p>B Examine the methods and techniques used in promotional activities</p>	<p>B1 Traditional promotional methods B2 Digital promotional methods B3 Integrated promotional strategies B4 Legal and ethical considerations</p>	<p>Students should outline various business promotional methods, compare their pros and cons for campaign objectives, and assess which methods best suit particular business situations.</p>
<p>C Plan and develop a marketing campaign that incorporates appropriate promotional strategies</p>	<p>C1 Campaign objectives C2 Target audience C3 Budgeting and resource allocation C4 Campaign planning C5 Creative development</p>	<p>Students must create a marketing campaign plan outlining objectives, target audience, promotional methods, budget, and schedule. They should justify their promotional choices based on objectives and audience, and support their plan with research and best practice evidence.</p>

Learning aim	Key content areas	Assessment approach
<p>D Present and justify a marketing campaign proposal to meet business objectives</p>	<p>D1 Presentation techniques D2 Justifying decisions D3 Professional delivery</p>	<p>Students should present their marketing campaign proposal clearly, explaining how their choices align with objectives and audience needs. The presentation must be professional, persuasive, and provide a well-supported rationale.</p>

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand the role and purpose of promotion within the marketing mix

A1 Purpose of promotion

- Informing, persuading and reminding customers.
- Supporting business objectives:
 - increasing brand awareness
 - driving sales growth
 - supporting customer loyalty
 - enhancing customer retention.
- Building a distinctive brand identity in the marketplace.
- Driving engagement and interaction with target audiences.
- Educating customers about new products or features.
- Encouraging trial and repeat purchases.
- Counteracting competitor activity and market saturation.
- Reinforcing positive perceptions and managing brand reputation.

A2 Promotion in the marketing mix

- Relationship with product, price and place in the marketing mix.
- How promotion influences customer decision making and behaviour.
- Utilising digital platforms and social media to broaden reach.
- Adapting promotional strategies to suit different market segments.
- Aligning promotional efforts with overall brand strategy.
- Integrating multiple promotional channels for maximum impact.
- The role of branding in promotion.

A3 Types of promotion

- Above-the-line:
 - TV advertising
 - radio campaigns
 - print media (newspapers, magazines)
 - outdoor advertising (billboards, public transport)
 - cinema advertising
 - podcast sponsorships.

- Below-the-line:
 - direct marketing (mail shots, SMS, email)
 - sales promotions (discounts, coupons, loyalty programmes)
 - sponsorship of events or causes
 - public relations (press releases, media events)
 - trade shows and exhibitions
 - personal selling
 - experiential marketing (pop-up events, interactive demonstrations).

A4 Benefits and limitations

- Measuring the effectiveness of promotional activities.
- Cost implications, reach and effectiveness.
- Impact on brand image and customer perception.
- Level of audience engagement and interaction.
- Ability to target specific market segments.
- Measurability and analytics for campaign performance.
- Flexibility and adaptability to changing trends.
- Potential for long-term relationship building with customers.
- Risk of message clutter or customer fatigue.
- Ethical and legal boundaries.

Learning aim B: Examine the methods and techniques used in promotional activities

B1 Traditional promotional methods

- Print advertising, including newspapers and magazines.
- Flyers, brochures and direct mail distribution.
- Billboards and outdoor posters.
- Television and radio commercials.
- Sponsorship of local events and community activities.
- Trade shows and exhibitions.
- In-store promotions and point-of-sale displays.
- Face-to-face selling and networking.
- Strengths and weaknesses of offline channels.

B2 Digital promotional methods

- Social media marketing, email campaigns, influencer partnerships.
- Search engine optimisation (SEO).
- Pay-per-click advertising.

- Content marketing through blogs, articles and videos.
- Affiliate marketing networks.
- Mobile app advertising and push notifications.
- Online contests and interactive promotions.
- Webinars and virtual events.
- Remarketing and retargeting strategies.

B3 Integrated promotional strategies

- Combining digital and traditional methods for maximum impact.
- Consistency in messaging across channels.
- Leveraging customer data to personalise promotions.
- Aligning promotional timing with seasonal trends and events.
- Coordinating collaborative campaigns with strategic partners.
- Using analytics to monitor campaign effectiveness and adjust strategies in real time.
- Creating a unified brand voice to strengthen recognition and trust.

B4 Legal and ethical considerations

- Advertising Standards Authority (ASA) guidelines.
- Data protection in digital and traditional promotion.
- Compliance with consumer protection laws regarding advertising claims.
- Transparency in influencer and affiliate marketing partnerships.
- Intellectual property and copyright considerations in campaign content.
- Ethical targeting to avoid exploiting vulnerable groups.
- Responsible handling of customer feedback and complaints.
- Inclusivity and non-discrimination in promotional messaging.

Learning aim C: Plan and develop a marketing campaign that incorporates appropriate promotional strategies [SP - C&I]

C1 Campaign objectives

- Setting campaign objectives aligned with business goals.
 - increasing sales
 - growing market share
 - building brand awareness
 - enhancing customer loyalty
 - attracting a new target audience.
- Defining measurable key performance indicators (KPIs) to track campaign success.
- Establishing realistic and achievable targets based on available resources.

- Determining specific outcomes, such as increased brand awareness, lead generation or sales uplift.
- Setting a clear timeframe for achieving each objective.

C2 Target audience

- Segmenting audiences based on demographic, geographic, psychographic or behavioural factors.
- Utilising market research and surveys to inform audience profiles.
- Assessing purchase motivations and decision-making processes.
- Analysing past customer interactions and feedback trends.
- Recognising cultural, social, and economic influences on consumer behaviour.
- Mapping out digital engagement patterns, such as social media usage and online activity.

C3 Budgeting and resource allocation

- Estimating costs for different promotional activities.
- Allocating resources efficiently between methods (digital, print, events, etc.).
- Setting a contingency fund for unexpected expenditures.
- Monitoring spend against budget throughout the campaign lifecycle.
- Assessing return on investment (ROI) for each promotional activity.
- Coordinating with finance to ensure compliance with overall business budgets.

C4 Campaign planning

- Developing a detailed campaign schedule, outlining key milestones and deadlines.
- Sequencing activities to ensure logical flow and maximise impact (e.g. teaser launch before main campaign).
- Using time management and scheduling tools (e.g. GANTT chart, kanban boards, mapping tools).
- Assigning responsibilities and timelines to team members and stakeholders.
- Building in checkpoints for progress reviews and adjustments.
- Allowing flexibility to adapt to unforeseen circumstances or market changes.
- Coordinating with external partners and suppliers to ensure timely delivery of assets.

C5 Creative development

- Designing promotional materials (ads, social posts, email templates).
- Ensuring brand consistency and tone of voice.
- Collaborating with graphic designers, copywriters and content creators to generate engaging assets.
- Reviewing and refining creative concepts based on team feedback and target audience insights.
- Developing variations of creatives for different platforms and audience segments.
- Testing creative elements (headlines, calls-to-action) to optimise effectiveness.

Learning aim D: Present and justify a marketing campaign proposal to meet business objectives

D1 Presentation techniques

- Structuring a clear and persuasive proposal.
- Using visual aids (slides, mock-ups, prototypes).
- Practising delivery to ensure confidence and clarity.
- Tailoring the presentation style to the audience and context.
- Anticipating potential questions and preparing thoughtful responses.
- Incorporating storytelling techniques to make key points memorable.

D2 Justifying decisions

- Linking promotional choices to objectives and target audience.
- Supporting rationale with research and evidence.
- Evaluating the effectiveness of different promotional methods.
- Demonstrating how chosen strategies align with budgetary constraints.
- Assessing potential risks and proposing solutions.
- Referencing industry benchmarks or best practices to strengthen justification.
- Highlighting expected outcomes and key performance indicators.
- Aligning promotional choices to legal and ethical factors.

D3 Professional delivery

- Demonstrating clear and persuasive verbal communication.
- Engaging the audience through active listening and appropriate body language.
- Structuring information logically to maintain interest and clarity.
- Using visual aids effectively to reinforce key messages.
- Responding to challenging questions with confidence and composure.
- Adapting communication style to suit different audiences.
- Summarising main points concisely at the end of the pitch.
- Demonstrating openness to constructive feedback and incorporating suggestions.
- Managing time effectively during presentations and Q&A sessions.

Assessment criteria

Learning aim A: Understand the role and purpose of promotion within the marketing mix

Pass	Merit	Distinction
A.P1 Explain the role and purpose of promotion within the marketing mix and how it supports business objectives.	A.M1 Analyse the importance of promotion in influencing customer behaviour and achieving marketing goals.	A.D1 Evaluate the effectiveness of different types of promotion in meeting business objectives, using examples to support your judgement.

Learning aim B: Examine the methods and techniques used in promotional activities

Pass	Merit	Distinction
B.P2 Describe a range of promotional methods and techniques used by businesses.	B.M2 Compare the advantages and disadvantages of different promotional methods in achieving campaign objectives.	B.D2 Evaluate the suitability of different promotional methods for specific business scenarios, justifying your choices.

Learning aim C: Plan and develop a marketing campaign that incorporates appropriate promotional strategies

Pass	Merit	Distinction
C.P3 Produce a marketing campaign plan that includes objectives, target audience, chosen promotional methods, budget and schedule. [IS – C&SI]	C.M3 Justify the selection of promotional methods and techniques in relation to the campaign objectives and target audience.	C.D3 Provide a detailed rationale for the campaign plan, supported by research and evidence of best practice.

Learning aim D: Present and justify a marketing campaign proposal to meet business objectives

Pass	Merit	Distinction
D.P4 Present the marketing campaign proposal in an appropriate format.	D.M4 Explain the reasons for the choices made in the campaign plan, linking them to objectives and audience needs.	D.D4 Deliver a professional and persuasive presentation that includes a well-justified rationale supported by evidence.

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI ✓	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
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Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of four summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.M1, A.D1)

Learning aim: B (B.P2, B.M2, B.D2)

Learning aim: C (C.P3, C.M3, C.D3)

Learning aim: D (D.P4, D.M4, D.D4)

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must conduct a comprehensive evaluation of the strengths and weaknesses of different promotional types, such as advertising, sales promotions, digital marketing, public relations and direct marketing. Their evaluation should explore how each method operates and also its suitability in various business contexts and for a range of products or services. Students should use well-chosen, current examples from real businesses or detailed case studies to illustrate their points, showing an ability to critically assess the effectiveness, reach, cost and long-term impact of each method. They should also consider the influence of market trends and emerging technologies on the promotion used in different business contexts, and consider the potential limitations of different types of promotion. Where appropriate, students should suggest ways to optimise the use of these promotional types in integrated campaigns.

For merit standard, students must provide an in-depth analysis of how different forms of promotion influence customer decision making and contribute to the overall success of marketing activities. This analysis should go beyond surface-level observations, linking the characteristics of each promotional type to psychological or behavioural responses from target audiences. Students should support their analysis with real or simulated examples, identifying how specific promotional tactics drive brand awareness, customer engagement, and the achievement of objectives in different market scenarios. The discussion should also consider the interplay between promotional activities and other elements of the marketing mix, highlighting opportunities and challenges in achieving campaign objectives.

For pass standard, students must deliver a clear and comprehensive explanation of the role and purpose of promotion within a business context. This should cover why businesses invest in promotional activities, the various types of promotion that can be used (such as advertising, sponsorship, public relations, digital campaigns and more) and how each contributes to broader business objectives. Students should detail how promotion fits into the marketing mix, explaining its direct influence on increasing brand awareness, driving product sales, and supporting customer loyalty and retention. Practical examples should be provided to demonstrate these concepts in action, ensuring explanations are accessible and directly relevant to real-world business situations.

Learning aim B

For distinction standard, students must evaluate which promotional methods are most appropriate for a given business scenario and also provide an in-depth justification for their selection. This should include a thorough analysis of the target audience's characteristics, referencing demographic, behavioural, psychographic and geographic factors.

Justifications should align to the specific marketing objectives of the campaign, and the available budget. Students should support their evaluation with relevant data, current market trends, and clear examples from real businesses or case studies. Where possible, they should also anticipate potential challenges with each method and propose strategies to mitigate these issues, ensuring their evaluation is both critical and balanced.

For merit standard, students must compare a range of promotional methods, identifying and discussing their respective strengths and weaknesses in detail. This comparison should consider factors such as overall cost, potential reach, audience engagement, suitability for the chosen product or service, and expected effectiveness. Students are expected to use comparative tables or frameworks, integrating evidence from industry practice or simulated scenarios, to clearly illustrate why one method may be more suitable than another in a particular context. The analysis should highlight key differentiators and any situational factors that might influence the choice of method.

For pass standard, students must describe at least three distinct promotional methods. Their descriptions should include both traditional methods (such as print advertising, direct mail or in-store promotions) and digital methods (such as social media marketing, email campaigns or online advertising). For each method, students should explain how it works, its typical uses, and give practical examples of how businesses employ it within the marketing mix. The explanation should also touch on how these promotional activities contribute to achieving specific business objectives, such as boosting brand awareness, driving sales or supporting customer retention.

Learning aim C

For distinction standard, students must provide a comprehensive rationale for their campaign plan. This should include a thorough analysis of relevant market research, incorporating data on current market trends, customer behaviour patterns, and the competitive landscape. Students should demonstrate a sophisticated understanding of how their campaign aligns with broader strategic objectives and anticipate potential risks or barriers, offering contingency plans where appropriate. The rationale should be evidence-based, referencing both primary and secondary research sources, and should clearly justify why each strategic decision was made.

For merit standard, students must justify the selection of specific promotional methods within their campaign. This justification should discuss how each chosen approach directly supports the overall campaign objectives, meets the needs and preferences of the identified target audience, and fits within budget constraints. Students should provide a comparative analysis of alternative promotional options, explaining the advantages and disadvantages of each, and use real-world examples or case studies to support their decisions. The explanation should discuss the practical implications of their choices, considering factors such as timing, resource availability, and expected outcomes.

For pass standard, students must create a clear and structured marketing campaign plan that outlines all essential elements. This should include campaign objectives, a well-defined description of the target audience, a detailed list of promotional activities to be implemented, an estimated budget with basic justifications for cost allocations, and a timeline that shows the sequencing and scheduling of key activities. The plan should demonstrate the student's practical understanding of campaign planning by ensuring each section is logically organised and covers the necessary details to make the campaign actionable.

Learning aim D

For distinction standard, students must deliver a professional presentation that is persuasive, visually engaging, and fully supported by up-to-date research and concrete evidence. This should include data, references to credible sources, and a structured narrative that demonstrates a comprehensive understanding of promotional strategies. Students should respond confidently and thoughtfully to challenging audience questions, showcasing both critical thinking and adaptability in defending their plan.

For merit standard, students must clearly articulate the reasoning behind every choice made in their campaign, explicitly connecting each decision to the overarching campaign objectives and the specific characteristics of the target audience. This explanation should include comparative analysis of alternative approaches, a discussion of potential trade-offs, and reference to relevant industry examples to support their logic.

For pass standard, students must present their campaign proposal using an appropriate and professional format, such as a well-organised slideshow or a detailed written report. The proposal should be logically structured, covering each key component – objectives, target audience, promotional activities, budget and timelines – in sufficient detail to demonstrate a clear and practical understanding of campaign planning.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 3: Generating Customer Loyalty
- Unit 4: Branding Products and Services.

Unit 14: Promote an Event and Evaluate the Success

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to equip students with the skills to plan, promote and review the promoting of an event. The unit focuses on ways to engage target audiences, using effective promotional methods and evaluating the success of marketing through data and feedback.

Unit introduction

Marketing is vital in helping organisations to capture the interest and excitement of their target audiences and achieve success in any event. This unit introduces students to the principles and practices of marketing within an events context, exploring how creative and innovative promotional strategies can be used to achieve event objectives. Students will investigate how different types of events are marketed and the importance of understanding audience needs, stakeholder interests, and the unique challenges of event marketing.

In this unit, you will develop the skills to plan and design a focused marketing campaign for a selected event. You will learn how to conduct essential research, set clear objectives, and create engaging marketing materials that reflect the event's purpose theme and objective. The unit emphasises practical application, guiding students through the process of implementing their campaign, engaging with audiences through key touchpoints, and using digital tools to monitor and adjust their approach to marketing. By evaluating the effectiveness of the marketing campaign, you will reflect on the strengths and areas for improvement in their campaign, making recommendations for future events.

By completing this unit, students will gain practical experience in event marketing, promotional design and campaign management. They will develop skills that are valuable for progression into marketing, events management or further study in related fields.

Learning aims

In this unit you will:

- A** Understand how promotion is used to market events successfully
- B** Plan and develop a focused marketing campaign for a selected event
- C** Implement and promote an event marketing campaign to a given audience
- D** Evaluate the success of the event marketing campaign.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Understand how promotion is used to market events successfully</p>	<p>A1 Types of events and audiences</p> <p>A2 Purpose of event promotion</p> <p>A3 Key principles and methods of promotion</p> <p>A4 Selecting promotional channels</p> <p>A5 Stakeholder considerations</p> <p>A6 Success factors</p>	<p>Students should submit a brief report or presentation outlining the purpose of event promotion and the main methods used for two different events. They should analyse how these strategies meet event objectives and recommend the most effective approaches with examples.</p>
<p>B Plan and develop a focused marketing campaign for a selected event</p>	<p>B1 Research and feasibility</p> <p>B2 Setting campaign objectives</p> <p>B3 Audience profiling</p> <p>B4 Campaign planning</p> <p>B5 Creative development</p>	<p>Assessment should require a campaign plan with SMART objectives, target audience, chosen promotional methods, basic budget and schedule, and sample marketing materials. Students must justify their choices and explain how their plan aligns with the event's purpose and audience needs.</p>
<p>C Implement and promote an event marketing campaign to a given audience</p>	<p>C1 Campaign implementation</p> <p>C2 Monitoring and adjustments</p> <p>C3 Documentation</p> <p>C4 Professional practice</p>	<p>Students should run their campaign realistically, using selected promotional methods and at least one audience touchpoint. Evidence must include an activity log, screenshots or photos of campaign materials in use and a brief reflection on adjustments made to improve effectiveness.</p>

Learning aim	Key content areas	Assessment approach
<p>D Evaluate the success of the event marketing campaign</p>	<p>D1 Reviewing performance D2 Identifying strengths and weaknesses D3 Drawing conclusions</p>	<p>Assessment should have students compare campaign outcomes to original objectives, using data and feedback to identify strengths and weaknesses. They should analyse results, justify recommendations for future campaigns and present findings in a clear report or presentation.</p>

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand how organisations use promotion to market events successfully

A1 Types of events and audiences

- Overview of event types: e.g. corporate, charity, entertainment, virtual, hybrid events, product launches, community festivals, sporting events.
- Identifying and segmenting audiences:
 - demographics: e.g. age, gender, income level, occupation, education
 - psychographics: e.g. interests, values, lifestyles, attitudes, motivations
 - geographic segmentation: e.g. local, regional, national, international audiences
 - behavioural segmentation: e.g. event attendance frequency, loyalty, benefits.
- Audience engagement strategies:
 - creating tailored messages
 - interactive experiences
 - personalised invitations.
- Use of data analytics to refine audience targeting and measure engagement.

A2 Purpose of event promotion

- Raising awareness of the event and its value proposition.
- Driving attendance and maximising participant numbers.
- Building engagement before, during and after the event.
- Supporting organisational goals such as brand building or fundraising.
- Generating leads and fostering new connections within target markets.
- Enhancing stakeholder relationships and loyalty.
- Creating opportunities for community involvement and collaboration.
- Gathering valuable feedback and insights for future improvements.

A3 Key principles and methods of promotion

- Traditional vs. digital promotion:
 - print media
 - social media
 - email campaigns
 - influencer marketing
 - public relations (PR)
 - event listing platforms and online calendars

- partnerships with local businesses or community organisations
- video content and live streaming
- mobile app notifications and push alerts.
- Core strategies:
 - relationship marketing
 - content marketing
 - experiential marketing
 - personalised messaging and segmentation
 - collaborative campaigns with sponsors or partners.

A4 Selecting promotional channels

- Matching channels to audience and event type.
- Benefits and limitations of different methods.
- Cost-effectiveness and resource requirements for each channel.
- Potential for audience engagement and interaction.
- Integration of digital and traditional media.
- Suitability for event size, location and theme.
- Monitoring and measuring channel performance.

A5 Stakeholder considerations

- Roles of organisers, sponsors, partners, media and attendees.
- Expectations and contributions of each stakeholder group.
- Importance of clear communication and regular updates.
- Managing stakeholder relationships and potential conflicts.
- Ensuring alignment of stakeholder objectives with event goals.
- Measuring and reporting stakeholder satisfaction.

A6 Success factors

- Optimal timing of promotional activities.
- Clear, compelling messaging that resonates with the target audience.
- Creative use of visuals and storytelling.
- Effective integration of digital and traditional channels.
- Consistent branding across all materials.
- Leveraging partnerships and influencer support.
- Flexible strategies that adapt to feedback and change.
- Tracking and analysing engagement for continuous improvement.

Learning aim B: Plan and develop a focused marketing campaign for a selected event [SP - C&I]

B1 Research and feasibility

- Conducting basic market and audience research (desk research, surveys, competitor scan).
- Assessing event feasibility: purpose, objectives, constraints (budget, resources).
- Identifying unique selling points and competitive advantages.
- Exploring potential risks and developing mitigation plans.
- Gathering data on previous events for benchmarking and inspiration.
- Mapping out stakeholder expectations.
- Reviewing relevant legal, ethical or compliance requirements.

B2 Setting campaign objectives

- Writing objectives aligned to event goals.
- Defining clear key performance indicators (KPIs) to measure campaign success.
- Setting realistic timelines for each campaign phase.
- Establishing target outcomes for reach and engagement.
- Identifying methods for monitoring progress and making adjustments as needed.

B3 Audience profiling

- Creating a simple persona or audience profile.
- Audience touchpoints (e.g. event website, feedback QR code, social media interaction).
- Identifying audience demographics such as age, interests and location.
- Researching audience preferences and communication channels.
- Understanding audience motivations and potential barriers to engagement.
- Gathering insights from previous campaigns or feedback to refine audience targeting.

B4 Campaign planning

- Selection of promotional methods (e.g. social post, flyer, email).
- Outlining a basic budget and timeline.
- Assigning roles and responsibilities if working in a group.
- Identifying key campaign milestones and deadlines.
- Determining resources needed (e.g. design tools, printing services, staff time).
- Setting up a checklist to track campaign activities and deliverables.
- Planning for risk management and contingency strategies in case of unexpected challenges.
- Considering collaboration opportunities with partners or community organisations.

B5 Creative development

- Designing core promotional materials (e.g. poster, social media graphic, email draft).
- Mind-mapping creative concepts and themes to engage the target audience.
- Developing sample content for different platforms.
- Incorporating visuals, logos and colour schemes that align with the campaign identity.
- Preparing mock-ups or prototypes for stakeholder feedback before launch.
- Testing materials for accessibility and suitability across different devices or channels.
- Gathering and integrating feedback from peers or mentors to refine promotional materials.
- Finalising all promotional materials to ensure they are ready for production and distribution.
- Justifying selections and promotional materials:
 - suitability to audience and event
 - alignment to campaign objectives
 - flexibility of design and adaptation.

Learning aim C: Implement and promote an event marketing campaign to a given audience [IS - V&NC]

C1 Campaign implementation

- Launching the campaign using selected promotional materials (e.g. posting on social media, distributing flyers, sending emails).
- Setting up and using at least one audience touchpoint (e.g. event website, feedback QR code, social media interaction).
- Coordinating with partners or stakeholders for cross-promotion and wider reach.
- Ensuring all promotional materials are scheduled and delivered according to the campaign timeline.
- Responding to comments or queries from the audience to foster engagement and build positive relationships.
- Monitoring the live event (if applicable) to troubleshoot issues and capture real-time feedback.
- Utilising visuals and messaging consistently across all platforms and channels.
- Documenting best practices and lessons learned during implementation for future campaigns.

C2 Monitoring and adjustments

- Tracking basic metrics (views, clicks, responses).
- Making minor adjustments in response to early feedback or data (e.g. changing post timing, updating content).

- Assessing the effectiveness of each promotional channel in real time to reallocate resources if necessary.
- Engaging with audience members through interactive polls or Q&A sessions to boost participation.
- Recording any technical issues or unexpected challenges for post-campaign analysis.
- Providing regular status updates to the team and key stakeholders throughout the campaign.
- Capturing testimonials or positive feedback from the audience to use in future promotions.
- Ensuring all campaign materials remain accessible and inclusive for diverse audiences.
- Reviewing competitor activities for benchmarking and inspiration during the live campaign.

C3 Documentation

- Keeping a simple log of activities (what was done, when, and why).
- Collecting evidence (screenshots, photos, analytics extracts).
- Monitoring campaign sentiment through social listening and comment analysis.
- Documenting lessons learned in a shared folder for future reference.
- Flagging and addressing potential risks or negative feedback swiftly.
- Coordinating with external partners or influencers to ensure cohesive messaging.
- Tracking any budget adjustments or reallocations during the campaign.
- Maintaining a checklist to ensure all deliverables are completed on time.

C4 Professional practice

- Ensuring compliance with brand guidelines, Advertising Standards Authority (ASA) rules, and data protection.
- Archiving all relevant campaign files and assets for future audits.
- Regularly updating stakeholders on campaign progress and key milestones.
- Securing necessary permissions for the use of copyrighted materials or third-party content.
- Recording any crisis management steps taken in response to unforeseen challenges.
- Documenting communication workflows, including approval chains and sign-off processes.

Learning aim D: Evaluate the success of the event marketing campaign and suggest improvements [EL - MOL]

D1 Reviewing performance

- Comparing campaign outcomes to original objectives and key performance indicators (KPIs).

- Analysing quantitative data (attendance, engagement, reach) and qualitative feedback (comments, survey responses).
- Assessing budget adherence and resource allocation throughout the campaign.
- Evaluating the effectiveness of different marketing channels and tactics used.
- Reviewing stakeholder satisfaction and collaboration during campaign execution.
- Identifying any issues with timelines or deliverable completion.
- Monitoring the impact of crisis management strategies on campaign perception.
- Documenting lessons learned to inform future event marketing initiatives.

D2 Identifying strengths and weaknesses

- What worked well and why (e.g. effective messaging, strong visuals, good timing).
- What didn't work and possible reasons (e.g. low engagement, poor channel fit).
- Unexpected positive outcomes or creative solutions that emerged during the campaign.
- Aspects that exceeded expectations, such as higher-than-anticipated attendance or social media reach.
- Challenges faced in resource management or coordination among team members.
- Stakeholder or participant feedback highlighting notable strengths or areas for improvement.
- Any unforeseen obstacles that negatively impacted objectives or timelines.
- Effectiveness of crisis management or contingency actions implemented during the campaign.
- Areas where objectives or KPIs were not fully met and contributing factors.
- Examples of best practices that should be continued in future campaigns.

D3 Drawing conclusions

- Analyse how pre-campaign research informed the selection of strategies and design of promotional materials.
- Discuss the relationship between timeline adherence and campaign outcomes.
- Evaluate the impact of team roles and communication on execution and results.
- Identify correlations between budget allocation and the effectiveness of different promotional channels.
- Assess the influence of stakeholder or audience insights on mid-campaign adjustments.
- Compare anticipated risks identified during planning with actual challenges encountered.
- Summarise lessons learned regarding resource optimisation and workflow efficiency.

Assessment criteria

Learning aim A: Understand how organisations use promotion to market events successfully

Pass	Merit	Distinction
A.P1 Explain the purpose and main methods of event promotion for two different events. [MY – PGS]	A.M1 Analyse how chosen promotional strategies helped achieve event objectives.	A.D1 Evaluate which promotional strategies were most effective and recommend improvements.

Learning aim B: Plan and develop a focused marketing campaign for a selected event

Pass	Merit	Distinction
B.P2 Produce a basic campaign plan with objectives, audience, methods, and sample materials. [MY – PGS]	B.M2 Justify your choices of promotional methods and materials based on audience needs.	B.D2 Provide a well-reasoned rationale for your campaign, supported by research.

Learning aim C: Implement and promote an event marketing campaign to a given audience

Pass	Merit	Distinction
C.P3 Carry out your campaign using selected methods and record evidence of activity. [MY – PGS]	C.M3 Make appropriate adjustments during implementation and explain your decisions.	C.D3 Optimise your campaign using feedback or data and show measurable improvement.

Learning aim D: Evaluate the success of the event marketing campaign and suggest improvements

Pass	Merit	Distinction
D.P4 Review campaign results against objectives and identify what worked and what didn't. [MY – PGS]	D.M4 Analyse strengths and weaknesses, explaining reasons for outcomes.	D.D4 Make justified recommendations for improving future campaigns.

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL *	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC *	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I *
MY – PGS ✓	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of four summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.M1, A.D1)

Learning aim: B (B.P2, B.M2, B.D2)

Learning aim: C (C.P3, C.M3, C.D3)

Learning aim: D (D.P4, D.M4, D.D4)

Further information for teachers and assessors

Resource requirements

For this unit, students will need access to a range of current events management and marketing information from websites and printed resources.

Essential information for assessment decisions

Learning aim A

For distinction standard, students provide a comprehensive and critical evaluation of the effectiveness of their selected promotional methods in relation to the event's overarching objectives and purpose. This evaluation should demonstrate a clear cause-and-effect analysis, supported by robust evidence such as demographic and behavioural data, industry benchmarks or case studies. Students should identify and analyse any constraints encountered, such as budget or timing, and consider alternative promotional strategies, explaining why particular channels or messages were most suitable for achieving the event's aims. Recommendations must be clearly prioritised, practical and justified, reflecting an understanding of resource implications, audience segmentation and event context. For instance, a student might recommend reallocating part of the advertising budget to a more effective channel after comparing engagement rates; or suggest adapting campaign messaging based on insights from A/B testing to better target a specific demographic. All recommendations should be underpinned by detailed analysis and show how the combination of methods directly supported the event's objectives and delivered measurable outcomes.

For merit standard, students should provide a clear analytical consideration of the cause-and-effect relationship between a range of selected promotional methods and the overarching event objectives. For instance, they might explain that retargeted social ads drove last-minute ticket sales for a youth music event by reaching audiences who had previously engaged with posts but had not converted, and support this with demographic and behavioural data. The analysis should include audience segmentation, event context (such as scale, timing, and budget) and a critical assessment of why certain channels or promotional materials were most suitable. Students should justify their choices with specific examples, showing how the combination of methods aligned with and supported the event's objectives and purpose.

For pass standard, students must provide clear explanations of the purpose of promotional activities for two different events – such as raising awareness, driving registrations or sales, or engaging community members. They should consider methods and channels used in event promotion, such as social media campaigns, email newsletters, paid advertisements, PR initiatives, and on-site activations. Examples should be drawn from two contrasting events (for instance, a charity fundraiser versus a ticketed entertainment show) and show how different approaches were applied to suit each context.

Learning aim B

For distinction standard, students are expected to provide a detailed and structured rationale underpinned by concise, targeted research – this may include referencing detailed competitor case studies, analysing indicative platform performance benchmarks, and drawing on recent trends in event marketing. They should articulate considered trade-offs, such as weighing costs against projected audience reach or comparing broad targeting to niche engagement strategies. Their creative materials – such as campaign visuals and messaging – should demonstrate a high level of polish: readability, accessibility for the specific target audience, and adherence to standards and guidelines for advertising content. The campaign plan must be comprehensive and client-ready, presenting a logical flow, clear justifications, and a professional standard of presentation that would withstand scrutiny in a real-world context.

For merit standard, students need to justify their choices of promotional methods and materials with solid audience insights, referencing demographic data or behavioural trends that inform their channel selection and creative approaches. They should conduct and evidence simple feasibility checks, ensuring their ideas are realistic within available resources, such as cost, time and the skills of the team. Their plan should show clear alignment between objectives, the chosen channels, key campaign messages, and promotional materials, demonstrating that each element supports the overarching event goals and purpose. Additionally, the plan should define how success will be measured – identifying headline Key Performance Indicators (KPIs) and outlining methods for data collection, such as engagement rates, registrations or feedback scores.

For pass standard, a complete and practical plan is required. This must lay out clear objectives that are specific, measurable, achievable, relevant and time bound. The plan should include a defined target audience, the use of a small range of well-suited promotional channels and methods (for example, Instagram, email, and printed flyers) and a simple budget with headline costs for each key activity. A simple schedule and breakdown should be provided, organising campaign actions in a logical and manageable timeline. Students must also present at least two promotional materials, such as the draft of a social media post, a flyer or poster, and a sample email. While the campaign should align with the event, a high level of refinement is not essential at this level; the focus is on demonstrating an understanding of basic promotional principles and providing a solid, functional plan.

Learning aim C

For distinction standard, students consistently apply data-informed optimisations throughout the campaign. This might include analysing click-through rates to identify underperforming headlines, then developing and deploying alternative creative variants to boost engagement. Students should also use retargeting strategies – for example, focusing on users who left comments or interacted with previous content – to maximise reach and impact. The submission should include before-and-after performance indicators, even if drawn from simulated data, to clearly demonstrate tangible improvements. All campaign activities must adhere strictly to guidelines, industry standards and data protection requirements. Students are expected to maintain thorough records, such as versions of creative assets, documented approval processes, and archive logs to support transparency and accountability.

For merit standard, students follow their campaign plan with attention to operational details and record-keeping. They maintain a simple but effective activity log that tracks the timing, location and nature of each promotional action – such as posting on different platforms, distributing print materials, or updating email campaigns. When campaign constraints or real-time observations necessitate changes, students should make minor but logical adjustments, such as rescheduling a social media post to align better with peak engagement times or swapping out images to better suit audience preferences. Their documentation demonstrates operational competence as well as a continuous alignment between tactical choices and overarching campaign objectives, supported by brief rationales for each tweak made.

For pass standard, students must show that the campaign was implemented as planned or convincingly simulated if deployment was not possible. Evidence should include screenshots of live social media posts and sent emails, photographs of placed posters or flyers, and images of on-site touchpoints such as branded booths or feedback QR codes. In the case of a simulated campaign, students may use sandbox environments or mock-ups to illustrate how assets would appear in the real world. At least one key touchpoint – such as an active event landing page or a functioning feedback QR code – should be in operation, and basic tracking is established using simple metrics like click counts, page views or engagement tallies.

Learning aim D

For distinction standard, students should provide specific recommendations that are supported by data with a clear rationale for decisions. For example, students might recommend reallocating 20% of the digital advertising budget to Instagram reels based on comparative engagement rates from previous campaigns or industry benchmarks. They could advise testing a benefit-led headline if test results or survey responses indicate the current messaging underperforms, or propose introducing an early bird promotional code to drive registrations after analysing competitor timelines and conversion peaks.

Suggestions to move campaign launches forward would be justified by trend analysis showing higher audience receptiveness ahead of competitor events. Each recommendation should state the anticipated impact – such as projected increases in engagement or conversions – and outline what resources (time, creative assets, personnel, or budget) are necessary to implement the change. Students should present sequencing of next steps, suggest timelines, and identify key decision points for future campaign cycles.

For merit standard, students will consider the wider reasons and influences behind campaign results to provide meaningful insights. For instance, they might analyse why certain promotional materials or methods resonated more with the audience – referencing demographic data, psychographic profiles, or direct feedback from comments and surveys. They should consider factors such as channel saturation, posting frequency, or overlaps with competitor activity that may have influenced outcomes. Integration of both quantitative evidence (e.g. click-through rates, cost-per-click, engagement ratios) and qualitative evidence (such as open-ended feedback, testimonials, or sentiment analysis) is expected. Students must demonstrate clear connections between campaign outcomes and their initial plan or implementation decisions, providing concise justifications for any changes made during execution and reflecting on their effectiveness.

For pass standard, the review must explicitly relate campaign results to the initial objectives and headline key performance indicators (KPIs) set out in Learning Aim B. This includes straightforward comparison of actual registrations, engagement numbers, reach, clicks, landing page visits, or collected feedback against targets. Students should highlight key successes (for instance, exceeding engagement expectations on a particular channel) and identify shortfalls (such as lower than anticipated registration rates), supporting these observations with references to data points and, where appropriate, participant comments.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 15: Customer Immersive Experience
- Unit 22: Work Experience in Marketing.

Unit 15: Customer Immersive Experience

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to develop students' understanding of how businesses create engaging, innovative and technology-driven experiences that enhance customer satisfaction and loyalty.

Unit introduction

The marketing of products and services no longer relies on traditional audience interactions but instead on the emotional and physical connections that are formed with consumers. Marketeers are therefore implementing methods to connect with consumers on a personal level, encouraging human interaction, excitement and engagement through unusual and creative experiences and events. Products and services that implement creative and innovative experiential events are more likely to improve sales and recognition by capturing consumers through emotions and experiences.

In this unit you will investigate how customer experiences are used in campaigns through experiential marketing. Using your findings, you will develop and manage an experiential marketing event for a selected product or service. Based on the success and feedback of your event you will evaluate the success of experiential marketing and make suggestions for improvements.

This unit will help you to progress to employment in marketing and events management roles. It will also help you to move on to further study in higher education and to professional qualifications related to marketing, promotion and events management.

Learning aims

In this unit you will:

- A** Investigate the marketing of customer experiences for different products and services
- B** Plan and deliver a customer experience to meet objectives
- C** Reflect on the success of the customer experience in meeting set objectives.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Investigate the marketing of customer experiences for different products and services	A1 Purpose of customer experiences as marketing tools A2 Experiential marketing strategies A3 Immersive experiences in customer experience events	A report evaluating the purpose and use of customer immersive experiences in marketing campaigns for different products or services.
B Plan and deliver a customer experience to meet objectives	B1 Research, feasibility and success factors B2 Creating a customer experience plan B3 Contingency, emergency planning and risk management B4 Management of the customer experience B5 Gathering feedback	A plan detailing customer immersive experiences, budgeting and timescales. Working as part of a group, students must take an active role in the management of an experiential customer event, providing photographic evidence and witness statements.
C Reflect on the success of the customer experience in meeting set objectives	C1 Evaluation of the customer experience C2 Suggestions for improvements	A report evaluating the success of the customer experience event, with clear suggestions for improvement.

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Investigate the marketing of customer experiences for different products and services

A1 Purpose of customer experiences as marketing tools

Students should be able to demonstrate understanding of the different purposes of customer experiences:

- Boost brand awareness/ brand loyalty.
- Improve image and representation.
- Increase digital/physical footfall.
- Increase sales and revenue.
- Improve engagement and interaction with consumers and target audience.
- Branch into a new target market or demographic.
- Gain publicity, news mentions and exposure.
- Improve social media marketing and interactions, go viral.
- Launch new products/services.

A2 Experiential marketing strategies

Students should be able to demonstrate understanding of the different experiential marketing strategies:

- Showcase strategy: allowing consumers to experience the product/service face to face through immersive interactions.
- Guerrilla strategy: use of surprise experiences and the 'shock' factor to engage consumers and generate interactions.
- Digital experience strategy: use of technology, virtual reality, online platforms, influencer collaborations, user generated campaigns, gamification to promote a product or service by offering a digital experience.
- Sense strategy: using events and interactions with consumers to target their five senses individually or simultaneously to promote engagement.
- Giveaway strategy: promoting products or services through giveaways, freebies and mass-marketing audience touchpoints.
- Emotive strategy: using events, touchpoints and experiences to target emotional responses in consumers to promote interactions and engagement.

A3 Immersive experiences in customer experience events

Students should be able to demonstrate understanding of the different immersive experiences in customer experience events:

- Pop-up attractions.
- Augmented/virtual reality.
- Interactive activities.
- Demonstrations.
- Performances.
- Livestream events and digital interactions.
- Face-to-face giveaways/promotions.
- Brand experiences.
- Character meets.
- Product testing.

Learning aim B: Plan and deliver a customer experience to meet objectives [MY - PGS]

B1 Research, feasibility and success factors

Students should be able to plan and complete research activities for the customer experiences:

- Primary and secondary research.
- Qualitative and quantitative research.
- Competitor review.
- Analysis of previous experiential marketing events.

Students should be able to consider feasibility factors for the customer experiences:

- Event clarity and purpose.
- Aims and objectives of the customer experience.
- Brand/product/service personality.
- Technical feasibility.
- Legal feasibility.
- Health and safety constraints.
- Ethical feasibility.

Students should be able to consider and create success factors:

- Customer experience aims and objectives.
- Engagement targets.
- Audience interaction targets.

B2 Creating a customer experience plan

Students should be able to create a customer experience plan:

- Customer experience rationale and purpose.
- Aims and objectives.
- Logistics:
 - venue selection/location and layout
 - catering and refreshments
 - activities and entertainment
 - staffing – management, volunteers, temporary staff, performance artists
 - outsourcing and external human resources
 - promotional materials
 - technological resources.
- Partnerships/co-promotions.
- Publicity, press, social media.
- Budgets and financial forecasts.
- Timelines and milestones.

Students should be able to use customer experience planning tools:

- The customer experience planning process: research, design, planning, coordination and evaluation.
- Mind mapping.
- Gantt charts.
- Critical path analysis.
- Production schedules.
- Online planning tools.

B3 Contingency, emergency planning and risk management

Students should be able to consider and produce contingencies:

- Physical contingencies: weather, damage, venue access.
- Human resource contingencies: sickness, holidays, skills shortages, no-shows.
- Technical contingencies: power failure, internet outage, audio equipment failure, computer malfunction.
- Emergency incidents: fire, flood, injury, medical emergency, venue damage, electrocution, terrorism.
- Safety measures: crowd management, security, evacuation procedures, incident control, first aid.

B4 Management of the customer experience

Students should understand and be able to manage the customer experience:

- Contracts for: venue, suppliers, personnel, catering, entertainment.
- Staffing and scheduling.
- Entertainment, e.g. music, live art, lighting, videos.
- Security and health and safety.
- Logistics: deliveries, transport, directions, parking.
- Resources: audio, visual, technological, tools, furniture, supplies, payment processes.
- Catering and refreshments.
- Promotional materials and giveaways.
- Customer service, e.g. meet and greet, interaction points, guides, help points.

B5 Gathering feedback

Students should be able to gather feedback from the customer experience:

- Audience touchpoints.
- Collecting data methods, such as:
 - interviews
 - survey
 - face to face
 - live social media updates
 - feedback buttons
 - event apps.
- Delayed feedback: post-event email, surveys, feedback, competitions, paper surveys, post-event social media updates, recommendation polls.
- Social media shares, highlights, interaction data.

Learning aim C: Reflect on the success of the customer experience in meeting set objectives [MY - PGS]

C1 Evaluation of the customer experience

Students should be able to evaluate the customer experience by considering:

- Review of success: meeting aims and objectives, timing, keeping to budget set.
- Effectiveness of events management planning.
- Effectiveness of pre-event and post-event information.
- Analytics of digital marketing methods: number of shares, website views, social media interactions.
- Impact of teamwork and communication across team members.

- Analysis of audience feedback.
- Review of attendance figures.
- Review of challenges and issues faced.

C2 Suggestions for improvements

Students should be able to make suggestions for improvements at the customer experience:

- Improvements to the customer experience: location, type, audience size, resources, suppliers, venues.
- Improvements for marketing: materials, distribution, length of campaign, appropriateness of media.
- Staffing, skills, scheduling, training and development.
- Audience feedback and areas of development.

Assessment criteria

Learning aim A: Investigate the marketing of customer experiences for different products and services

Pass	Merit	Distinction
<p>A.P1 Explain the purpose of using customer experiences in marketing campaigns</p> <p>A.P2 Describe the use of customer immersive experiences in the promotion of different products/services.</p>	<p>A.M1 Analyse the effectiveness of customer immersive experiences in the promotion of different products/services.</p>	<p>A.D1 Evaluate the importance of customer immersive experiences in the promotion of different products/services to achieve successful outcomes. [SP – CT]</p>

Learning aim B: Plan and deliver a customer experience to meet objectives**Learning aim C: Reflect on the success of the customer experience in meeting set objectives**

Pass	Merit	Distinction
<p>B.P3 Produce an outline plan including immersion experiences for an experiential marketing event that will promote a selected product or service. [SP - PS]</p> <p>B.P4 Produce a basic budget and timescale for an experiential marketing event.</p> <p>B.P5 Demonstrate relevant management and marketing skills when running an experiential event and gathering audience feedback. [IS - T]</p>	<p>B.M2 Produce a detailed plan including appropriate immersive experiences with detailed research, budgeting and timescales that will promote a selected product or service.</p> <p>B.M3 Demonstrate effective management and marketing skills when running an experiential event and gathering audience feedback.</p>	<p>BC.D2 Implement a comprehensive plan including well-developed immersion experiences to effectively promote a selected product or service and evaluate your management and marketing skills. [SP - CT]</p> <p>BC.D3 Evaluate the importance of the detailed customer experience plan and immersion experiences in the effective promotion of a selected product or service, justifying suggestions for improvement. [SP - CT]</p>
<p>C.P6 Review the success of the customer experience in meeting aims and objectives.</p>	<p>C.M4 Analyse the success of planning and use of immersive experiences in promoting a product or service effectively, outlining relevant areas for improvement.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT ✓
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I
MY – PGS *	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, B.P5, C.P6, B.M2, B.M3, C.M4, BC.D2, BC.D3)

Further information for teachers and assessors

Resource requirements

For this unit, students will need access to a range of information on current events and marketing, from websites and printed resources. They will also need materials to run a customer immersive experience.

Essential information for assessment decisions

Learning aim A

For distinction standard, students will draw on varied information about the importance of the ways that experiential marketing events and immersive experiences are used to successfully promote a product or service. There will be clear justification as to how such marketing events have helped the success of the marketing and achievement of a purpose and outcome for each of the products or services explored.

For merit standard, students will present the outcomes of methodical and detailed examination about events and immersive experiences used to market two products or services, highlighting success factors and achievements. They will interpret the effectiveness of such methods in achieving outcomes and will analyse their findings.

For pass standard, students will show clear details of events in marketing campaigns to explain their purpose and impact. They will give evidence on how two products or services have used events and immersive experiences as part of a marketing campaign to achieve successful outcomes.

Learning aims B and C

For distinction standard, students will present a comprehensive plan for an event including immersive experiences to promote a selected product or service. They will implement their plan, managing the event from pre- to post stage while gathering feedback and demonstrating effective marketing and management skills. Students will evaluate the importance of the event plan and experiences and make suggestions for improvement using delegate feedback and self-reflection to underpin justifications.

For merit standard, students will run and manage an experiential marketing event including immersive experiences in line with a detailed plan, research, budget and timescales to promote a selected product or service. They will engage effectively with audience members to gather feedback and demonstrate effective management and marketing skills.

For pass standard, students will run and manage an experiential marketing event including immersive experiences for a selected product or service in line with a basic event plan, budget and timescale to demonstrate management and marketing skills. They will gather feedback from audiences in order to review the success of the event in meeting expected outcomes.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 14: Promote an Event and Evaluate the Success
- Unit 22: Work Experience in Marketing.

Unit 16: Activating a Brand

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to enable students to understand how businesses bring brands to life through campaigns, experiences and engagement strategies. Students will explore techniques to connect with target audiences, build brand awareness and drive customer loyalty through effective brand activation.

Unit introduction

Retail environments, whether physical or digital, use techniques designed to encourage the sale of products or services. Activating a brand is the art of displaying products in ways that customers will find engaging and appealing. Physical, visual and experiential promotional techniques in retail environments are all important aspects of brand activation, designed to increase traffic and sales volume.

In this unit, you will investigate brand activation techniques, including the use of locations, communication and legal and ethical practice. You will use this to inform your creation of brand activation in response to a client brief. You will apply testing, collection of feedback and reflection throughout the development, using marketing industry practice.

This unit will help you to progress to employment, vocational training and higher apprenticeships, and to higher education in marketing-related roles or qualifications. It will be especially helpful for those seeking roles which involve building and developing brands and within the retail sector.

Learning aims

In this unit you will:

- A** Investigate brand activation practice for a selected organisation
- B** Create brand activation for a specific client brief
- C** Review the brand activation created for the specific client by responding to testing, feedback and reflection.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Investigate brand activation practice for a selected organisation	A1 Organisation needs for brand activation A2 Spaces for brand activation A3 Brand activation techniques A4 Communication practice in brand activation A5 Legal, safety and ethical considerations	A portfolio of research and analysis into a range of brand activation strategies used by a selected organisation.
B Create brand activation for a specific client brief	B1 Design development B2 Media and materials B3 Production techniques and processes	A portfolio of brand activation design development with a final outcome to meet a specific client brief. A review of the brand activation created in response to data collected from testing, feedback and reflection.
C Review the brand activation created for the specific client by responding to testing, feedback and reflection	C1 Testing and feedback C2 Reflection of development and production C3 Evaluative factors	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Investigate brand activation practice for a selected organisation

A1 Organisation needs for brand activation

Students should be able to recall and demonstrate understanding of the specific purposes of brand activation, for example:

- Increase awareness.
- Instil confidence in customers.
- Increase sales and revenue.
- Promote specific products.
- Differentiate.
- Target specific market segments.
- Increase market reach.
- Rebrand.
- Brand loyalty.
- Provide information.

A2 Spaces for brand activation

Students should be able to demonstrate understanding of the different spaces for visual merchandising, for example:

- Digital, such as online, mobile app, social store.
- Physical.
- Department stores.
- Specialist stores e.g. clothing, jewellery, footwear, chocolate, fragrances.
- Supermarkets.
- Convenience.
- Discount stores.
- Designer outlets, factory outlets.
- Not-for-profit, such as charities.
- Non-standard, such as 'pop-up' shops, farm shops, markets, events spaces.
- Sports, such as leisure centres, gyms, professional sports clubs.

A3 Brand activation techniques

Students should be able to consider the different brand activation techniques used, their advantages and disadvantages and their suitability for different scenarios, for example:

- Styling, presentation, art direction.
- Product segmentation: by theme, promotion, event, and season across business.
- Approach: themes/stories, coordination, colour/style blocks, complementary/contrasting colours, repetition, mirror imaging and triangular formulation, focal points, branding/signage, mass display, micro-merchandising, demonstrations, sampling, free trials, fresh and relevant products.
- Experiential merchandising: augmented reality, virtual reality immersive experience.
- Props: mannequins/busts/forms, sculptures furnishing enhancements.
- Fixtures: gondolas, end caps, dump tables/bins, garment rails, slat walls, counters, shelves, platforms, showcases, forms.
- Free-standing displays: stacks, islands.
- Imaging and online content: photography, lighting, text, image manipulation.
- Social media integration: customer photo opportunities, social media sharing, influencer collaborations, celebrity collaborations, live streaming, gamification challenges and rewards.

A4 Communication practice in brand activation

Students should be able to consider the different ways to communicate in brand activation:

- Images.
- Experiential.
- Formal elements.
- Typography.
- Materials.
- Textures.
- Lighting.
- Scale.
- Use of branding.
- Signage.

Students should be able to consider the different ways that non-visual communication is used, for example :

- Sound and music.
- Scent.
- Touch.
- Taste.
- Atmosphere.
- interaction, such as screens.

Students should be able to consider the different ways organisations will use positioning and visibility, for example:

- Placement
 - physical, such as windows, transition zones, fitting rooms, proximity to high-traffic areas
 - online, such as above the fold, landing page, consistency, accessibility, hierarchy
 - event spaces.
- Sight lines.
- Ergonomics and anthropometrics.
- Composition – vertical or horizontal.
- Directions, such as announcements, signage.

A5 Legal, safety and ethical considerations

Students should be able to demonstrate understanding of legal, safety and ethical considerations in brand activation:

- Point of sale (POS) and ticketing:
 - selling price and ticket positioning legislation
 - product labelling legislation: quantity, size, composition, origin, allergens, storage conditions and date such as best before, use by.
- Product safety legislation.
- Weights and measures legislation.
- Consumer protection legislation.
- Food safety legislation.
- Health and safety legislation.
- Display safety: height of merchandise, stability, weight distribution/capacity, correct temperature, signage.
- Ethical considerations, e.g. inclusivity, accessibility, age, vulnerable people, pester power, consent, environmental impact.

Learning aim B: Create brand activation for a specific client brief [IS - C&SI]

B1 Design development

Students should be able to recall, understand and complete the steps in the brand activation process, for example:

- Defining a client brief:
 - scope and parameters
 - target market
 - objectives
 - client and target market needs.
- Budget:
 - research and scoping
 - concept visuals and drafts
 - model
 - prototyping
 - testing and feedback
 - revision and refinement
 - production.

B2 Media and materials

Students should be able to use a range of media and materials when planning and producing brand activation, for example:

- Physical – card, plastic, fabric, paper, metal, ready-made objects.
- Digital – images, colours, typography, video, graphics, sound.

B3 Production techniques and processes

Students should be able to use a range of production techniques, processes and methods used in the creation of brand activation, for example:

- Design software – vector, raster, type.
- Multimedia software – video, interaction.
- Printing processes.
- Media and material manipulation.
- Fabrication, such as connecting, sculpting, fastening, adaptation.
- Spatial development, such as attachment, hanging, installing, connecting, painting, arranging and organisatio.
- Health and safety.

Learning aim C: Respond to testing, feedback and reflection in the development of brand activation for a client brief [SP - C&I]

C1 Testing and feedback

Students should be able to complete testing and obtain feedback in brand activation using:

- Iterative testing.
- Use of audience for testing and feedback:
 - client
 - audience, users and target market
 - peers.
- Recording information from testing.
- Visual and observation records of tests.
- Location or simulated.
- Collecting feedback, e.g. questionnaire, focus group, survey, interview.

C2 Reflection of development and production

Students should be able to reflect on strengths and areas of development when planning, developing and finalising brand activation:

- Throughout design development and production.
- Evaluating progress.
- Revising intentions, goals and targets.

C3 Evaluative factors

Students should be able to evaluate strengths and areas of development in brand activation considering:

- Brand and brand guidelines.
- Initial intentions and client brief.
- Visibility.
- Impact.
- Suitability for audience.
- Development process.
- Durability and strength.
- Quality of production.
- Legal and ethical issues.
- Comparison with competition.

Assessment criteria

Learning aim A: Investigate brand activation practice for a selected organisation

Pass	Merit	Distinction
<p>A.P1 Explore brand activation organisation needs, use of spaces, and legal, safety and ethical considerations.</p> <p>A.P2 Explore brand activation techniques and communication practice in physical and digital brand activation.</p>	<p>A.M1 Compare how the techniques and communication used in brand activation successfully support organisation needs.</p>	<p>A.D1 Evaluate how the techniques and communication used in physical and digital brand activation support organisation needs.</p>

Learning aim B: Create brand activation for a specific client brief

Learning aim C: Review the brand activation created for the specific client by responding to testing, feedback and reflection

Pass	Merit	Distinction
<p>B.P3 Outline the details of a brand activation brief.</p> <p>B.P4 Develop appropriate brand activation for a specific client brief.</p>	<p>B.M2 Develop effective brand activation informed by clear assessment of organisation and target market needs.</p>	<p>BC.D2 Develop assured and sophisticated brand activation informed by in-depth and sustained assessment of development in relation to organisation and target market needs.</p>
<p>C.P5 Apply iterative testing and collection of feedback on development work of brand activation. [MY – TPR]</p> <p>C.P6 Apply appropriate reflection on the brand activation development and outcomes.</p>	<p>C.M3 Apply effective testing, reflection and evaluation of brand activation throughout the development.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR ✓	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI *	

Table key

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Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, BC.D2)

Further information for teachers and assessors

Resource requirements

Students will need access to a range of current marketing information via websites and published resources. They will also need access to some design and production materials in order to meet the outcomes.

Essential information for assessment decisions

Learning aim A

For distinction standard, students will draw on broad and relevant information on pertinent brand activation themes and concepts. They will assess and compare the strengths, weaknesses, relevance and significance of brand activation techniques and communication used in the context of organisation needs, for both physical and digital brand activation. Their judgements relating to the contribution that brand activation makes to the success of the organisation will be justified, including the use of spaces, legal, safety and ethical requirements.

For merit standard, students will demonstrate clear analysis of relevant approaches and techniques used in brand activation. They will compare the brand activation techniques and communication used in different contexts and consider how these support different organisational needs, making some supported judgement about the success. Students will also explain how brand activation techniques can be affected by organisational needs and legislative, safety and ethical requirements, with reference to clear examples.

For pass standard, students will give clear details of general brand activation techniques and communication practice for both digital and physical spaces, describing and explaining the key factors with reference to examples. Students will also explain how brand activation techniques can be affected by organisational needs and legislative, safety and ethical requirements.

Learning aims B and C

For distinction standard, students will create perceptive and effective brand activation either online or in traditional formats. Each aspect will be well developed, and the use of development and production techniques will be consistently applied. Brand activation will be comprehensively tested, considering target market needs and objectives using thorough methods. The message communicated and the formats applied will be engaging and assured in response to in-depth assessment of the organisation's needs, and the scope, parameters and opportunities in the brief.

For merit standard, students will create appropriate brand activation either online or in traditional formats. Most aspects of the brand activation will be well developed. The use of development and production techniques will mostly be cohesive and competent. The brand activation will be tested at relevant stages of development, considering target market needs and objectives using suitable methods. The message communicated will be competent and considered, and the formats and materials development will be clearly informed by broad research into the target market and organisational needs.

For pass standard, students will give a clear account of the scope, parameters and details of the brand activation brief, going into some logistical details of the requirements. They will use some of this information to inform brand activation for a specific client brief. The communication in the brand activation will generally relate to the organisation's objectives and will be coherent for the audience. Students will apply some testing and collection of feedback throughout the development, which will have a limited impact on the development process. Students will partially reflect on their progress and outcomes using some relevant criteria on which to base their decisions and actions.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 3: Generating Customer Loyalty
- Unit 4: Branding Products and Services
- Unit 22: Work Experience in Marketing.

Unit 17: Developing Influencer Marketing

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to provide students with knowledge and skills to understand how influencers shape consumer behaviour and brand perception. Students will explore strategies for selecting and collaborating with influencers. They will design campaigns and evaluate their effectiveness in driving engagement, awareness and business growth.

Unit introduction

Influencer marketing is growing rapidly. Although the concept of influence is often thought of as a new idea, it has been established for many years. Influencers can be seen as an updated version of opinion leaders rather than a new concept. In a changing marketing environment, traditional methods of promotion such as newspaper and television advertising have decreased, and there has also been a decline in trust in organisations. Therefore, new ways of communication have emerged through social media platforms. This has resulted in the growth of influencers, who are being engaged by organisations to promote their goods and services. In their online platforms, influencers generate content, share material about brands and discuss their experiences.

This unit will help you to progress to employment in the digital marketing industry or the wider marketing industry. It will also help you to move on to further study in higher education and to professional qualifications related to marketing.

There are two main influencer categories: macro and micro. The macro influencers have many hundreds of thousands of followers on social media platforms and may be well-known celebrities. At the other end of the scale, micro-influencers may have followings of 2,000 to 25,000 and may be more enthusiastic individuals sharing information about an interest, later turning professional. Many types of organisations use influencer marketing, from opinion leaders in charities to well-known businesspeople in business-to-business (B2B) organisations, as well as celebrities for well-known brands.

Learning aims

In this unit you will:

- A** Investigate influencers and their associated marketing campaigns
- B** Explore the use of influencer marketing within a specific market sector
- C** Develop an influencer marketing plan for a specific organisation.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Investigate influencers and their associated marketing campaigns	A1 Types of influencers and influencer requirements A2 Types of influencer marketing campaigns	A report evaluating the relationship between influencer, type of influencer campaign and influencer requirements.
B Explore the use of influencer marketing within a specific market sector	B1 Objectives of influencer marketing B2 Legal and ethical considerations B3 Assessing an influencer marketing campaign	Portfolio of market research into influencers, influencer marketing plan and brief for influencer.
C Develop an influencer marketing plan for a specific organisation	C1 The influencer marketing plan C2 Preparing a brief for the influencer	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Investigate influencers and their associated marketing campaigns [EL - MOL]

A1 Types of influencers and influencer requirements

Students should be able to demonstrate understanding of the different types of influencers.

- Early adopters (individuals who adopt new goods and services faster than others):
 - Rogers' theory of Diffusion of Innovation – the behaviour of sharing and influencing news about products and services, such as the role of early adopters () and their communities
 - awareness
 - recognition
 - engagement
 - intention to buy.
- Traditional influencers:
 - opinion leaders (knowledgeable enthusiasts)
 - opinion formers (qualified experts).
- Digital influencers, for example:
 - mega influencers – typically celebrities with over 1 million followers
 - macro-influencers – typically internet-made celebrities and well-known people with 100,000 to 1 million followers
 - micro-influencers – typically everyday individuals with between 10,000 and 100,000 dedicated followers
 - nano influencers – typically everyday individuals with 1,000 to 10,000 followers
 - key opinion customers.

Students should be able to consider different influencer characteristics, for example:

- Dedicated following.
- Regular content.
- Consistency.
- Clear focus.
- Exposure.
- Engagement.
- Authenticity.

- Quality content creation.
- Community management.

A2 Types of influencer marketing campaigns

Students should be able to demonstrate understanding of the different types of influence on customers, for example:

- Brand and product awareness and attention.
- Interest in functionality, style, quality and performance.
- Desire for brand association and status.
- Action leading to purchase.

Students should be able to demonstrate understanding of the different types of influencer marketing campaigns, for example:

- Paid-for endorsements.
- Product reviews.
- Unboxing videos.
- Promotional content.
- Giveaways.
- Giftings.
- Competitions.
- Social media/influencer takeovers.
- Guest blog posts.
- Brand ambassadors.
- Affiliate marketing programmes.
- Event activations.
- User-generated campaigns.

Learning aim B: Explore the use of influencer marketing within a specific market sector [EL - MOL]

B1 Objectives of influencer marketing

Students should be able to consider the reasons for using influencers, for example:

- Promote a brand, product or service.
- Gain awareness.
- Increase engagement.
- Create more links to the organisation's content.
- Drive app downloads.
- Change brand perception.
- Direct communication with customers.

- Closeness of influencer to customers' tastes/likes.
- Influencing consumer trust:
 - going viral – cross-platform proliferation, such as
 - forums
 - review and rating platforms
 - social media platforms
 - blogs.

B2 Legal and ethical considerations

Students should be able to demonstrate understanding of the difference between sponsorship and endorsements:

- Paid-for sponsorship in exchange for publicity, for example:
 - product placement
 - blog posting
 - product mentions.
- Endorsement or approval of product, location or service, which may be unpaid, for example:
 - testimonials, reviews and recommendations
 - case studies of featured customers.

Students should be able to consider different relevant legal considerations, for example:

- Data protection legislation.
- Competition law.
- Advertising disclosure and codes of practice.
- Consumer protection.
- Intellectual property e.g. copyright for music or images.
- Consumer rights with distance selling.
- Requirements for specific products, such as alcohol, gambling, tobacco, food, healthcare, beauty products.

Students should be able to consider ethical issues, for example:

- Disclosure and transparency e.g. commercial relationships, declaring sponsorship, free goods or services.
- Misleading endorsements such as having not used the product, or promoting unrealistic beauty standards.
- Promotion of health-related product e.g. weight loss products.
- Promotion of cosmetic procedures.
- Avoiding gender stereotypes.
- Fake reviews.

B3 Assessing an influencer marketing campaign

Students should be able to complete research into an influencer campaign considering, for example:

- Audience reach.
- Targeting and types of customer.
- Creativity.
- Scale e.g. number of platforms, number of unique single or multiple content produced.
- Disclosure of sponsorship.
- Exposure.
- Audience feedback.
- Relevance to the brand.
- Behaviour of influencers.
- Legal and ethical issues if present.

Learning aim C: Develop an influencer marketing plan for a specific organisation [EL - MOL]

C1 The influencer marketing plan

Students should be able to produce an influencer marketing plan:

- Relevant objectives for the plan.
- Target audience and demographic.
- Key messages.
- Network or platform.
- Selecting influencers:
 - relevance to organisation
 - resonance and influence
 - reach
 - approach of influencer.
- Compensation, for example:
 - payment
 - free products or discounts
 - commission or royalties
 - other expenses.

- Method and format, for example:
 - organisation controlled
 - creative freedom, such as:
 - allowing influencers personal creative decisions
 - using own photographers or videographers
 - type of content needed, such as
 - copy
 - images
 - video.
- Schedule and timelines.
- Resources required to deliver the plan, for example:
 - costs
 - tools
 - time
 - people
 - materials.
- Tasks and responsibilities.

C2 Preparing a brief for the influencer

- Students should be able to produce a brief for an influencer:
 - purpose of campaign
 - objectives
 - timing requirements
 - platform
 - content requirements
 - outputs
 - payment
 - people involved
 - other relevant information, for example:
 - background to the organisation
 - brand or product information
 - location for campaign
 - look and style details.

Assessment criteria

Learning aim A: Investigate influencers and their associated marketing campaigns

Pass	Merit	Distinction
<p>A.P1 Describe the different types of influencers and their characteristics.</p> <p>A.P2 Explain the different types of influencer marketing campaigns.</p>	<p>A.M1 Compare the different types of influencer and influencer marketing campaigns.</p>	<p>A.D1 Evaluate the relationship between the types of influencer, type of influencer campaign and influencer requirements.</p>

Learning aim B: Explore the use of influencer marketing within a specific market sector

Learning aim C: Develop an influencer marketing plan for a specific organisation

Pass	Merit	Distinction
<p>B.P3 Explain fundamental issues in influencer marketing within a specific market sector. [SP – C&I]</p> <p>B.P4 Review an influencer marketing campaign that meets set objectives.</p>	<p>B.M2 Assess an influencer marketing campaign in detail within a specific market sector that meets set objectives.</p>	<p>BC.D2 Create a proficient and detailed influencer brief and marketing plan, based on specific objectives and a thorough examination of a relevant influencer campaign.</p>
<p>C.P5 Create an appropriate influencer marketing plan for a specific organisation. [SP – C&I]</p> <p>C.P6 Create an appropriate brief for the influencer. [SP – C&I]</p>	<p>C.M3 Create an effective influencer marketing plan and influencer brief based on clear objectives.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL *	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I ✓
MY – PGS	EL – PRS	IS – C&SI	

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There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, C.P6, B.M2, C.M3, BC.D2)

Further information for teachers and assessors

Resource requirements

To complete the assessment students must have access to the internet and specifically social media to be able to conduct research into influencer marketing campaigns. They should consider real world campaigns. There is a requirement to produce a plan for an influencer campaign and a brief. However, students do not need to produce the actual campaign.

Essential information for assessment decisions

Learning aim A

For distinction standard, students will undertake a methodical and in-depth examination of types of influencer, the types of influence they exert and the campaigns they undertake. They will break down the component parts of each and explain the relationship these have with each other in detail, drawing on pertinent examples from different types of influencing to communicate and support their findings.

For merit standard, students will assess the types of influencer, their influence and the campaigns they undertake. They will break down the component parts of each and explain the relationship these have with each other in some detail, drawing on relevant examples from different types of influencing to communicate and support most of their findings.

For pass standard, students will give an account of the types of influencer and outline what they require to have an impact. They will identify varied and relevant types of influencer marketing campaigns, using mostly relevant examples for exemplification of their points.

Learning aims B and C

For distinction standard, students will develop a sophisticated and thorough influencer marketing campaign plan covering all the main elements. The objectives will be reasoned and the message engaging for the target audience, and the type of campaign and platform will be clearly relevant for the target audience and demographic. The campaign will be informed by detailed examination of an influencer marketing campaign within a relevant sector and the fundamental issues in influencer marketing. The plan will include a clear and focused brief for the influencer that is well informed by appropriate objectives, with details of the purpose of the campaign, timing, platform, payment and content requirements.

For merit standard, students will develop a sound and logical influencer marketing campaign plan, with detailed sections for most of the main elements. The objectives will be coherent and the message relevant for the target audience, and the type of campaign and platform will be mostly relevant for the target audience and demographic. The campaign will be informed by careful consideration of the influencer marketing campaign within a relevant sector and the fundamental issues in influencer marketing. The plan will be supported by a brief for the influencer that is informed by clear objectives, with clear identification of the purpose of the campaign, timing, platform, payment and content requirements.

For pass standard, students will give details of the general issues in influencer marketing within a specific market sector, exemplifying and illustrating findings and observations with relevant examples. They will investigate an influencer marketing campaign, making observations of most of the key objectives and their impact. Students will develop an adequate plan with general details of objectives, message and logistics. Students will also develop a brief for the influencer that outlines the objectives, purpose of the campaign, timing, platform, payment and content requirements.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 7: Investigating Digital Marketing
- Unit 9: Design and Develop a Digital Marketing Campaign
- Unit 10: Test and Review a Digital Marketing Campaign.

Unit 18: Market Research

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to equip students with the skills to gather, analyse and interpret data to support business ideas. Students will explore research methods, identify target markets, and use insights to inform decision making and improve business success.

Unit introduction

Market research is critical to the development and continuation of organisations. The marketing industry has seen huge growth, with a wealth of data-collection, management and analytical tools being developed and improved, providing deeper and richer understanding of audience demographics, psychographics, habits and intentions. All of this gives a fascinating insight into customers and users, and into the ability of organisations to make more strategic decisions in terms of their offering.

In this unit, you will develop your research skills and your understanding of the role that market research information plays in identifying and satisfying customers' needs. You will gain an insight into the importance of collecting and interpreting market research information as a tool for making wider business decisions. You will explore the purpose and type of market research undertaken for a business and consider the objectives of the research and the processes followed. You will plan and undertake a research activity using appropriate design and sampling methods. You will analyse and interpret market research data and present your findings. You will use this knowledge to make recommendations for a selected business.

This unit will help you to progress to employment in specific market research and analysis roles that may or may not be marketing related. The unit will also help you to progress to further study in higher education or professional qualifications in marketing or social sciences.

Learning aims

In this unit you will:

- A** Examine types of market research used by businesses to inform marketing decision making
- B** Implement market research activities to meet a specific business's marketing objectives
- C** Review market research findings and make recommendations for a business.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Examine types of market research used by businesses to inform marketing decision making	A1 Purpose of market research A2 Marketing objectives A3 Types of market research methods A4 Appropriateness of choice of market research	A report evaluating the different types of market research used in businesses to make decisions to meet marketing objectives.
B Implement market research activities to meet a specific business's marketing objectives	B1 Planning stage B2 Market research activities	Market research portfolio with research tools and analysis, supported by conclusions and recommendations for a business.
C Review market research findings and make recommendations for a business	C1 Statistical analysis and interpretation of primary and secondary research C2 Presentation of research results C3 Validate findings	

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Examine types of market research used by businesses to inform marketing decision making

A1 Purpose of market research

- Understanding customer behaviour, demographics, psychographics, habits and intentions.
- Determining buying trends.
- Investigating brand/advertising awareness.
- Helping new product and/or service development.
- Investigating feasibility of entry into new markets.
- Meeting marketing objectives.

A2 Marketing objectives

- Understanding customer wants and needs.
- Developing new products.
- Improving profitability.
- Increasing market share.
- Diversification.
- Increased brand awareness and loyalty.
- Adopting new pricing strategies.
- Increasing sales volume.
- Expanding locations (physical and/or digital).
- Increasing efficiency in logistics and distribution.
- Adapting elements of the physical experience for customers.
- Adapting processes to better meet customer needs.
- Amending the impact people have on the customer experience.

A3 Types of market research methods

- Qualitative and quantitative.
- Secondary research:
 - internal sources
 - EPOS/sales records

- loyalty data
 - website monitoring
 - accounting records
 - customer satisfaction surveys
- external sources
 - internet
- the use of AI and social media
 - government statistics
 - competitor reports
 - specialist market intelligence agencies, e.g. Mintel.
- Primary research:
 - surveys, questionnaires
 - observation
 - monitoring of 'baskets'
 - e-marketing
 - focus groups
 - pilot research.

A4 Appropriateness of choice of market research

- Cost.
- Accuracy.
- Timelines.
- Response rates.

Learning aim B: Implement market research activities to meet a specific business's marketing objectives [SP - CT]

B1 Planning stage

- Problem definition.
- Set research objectives.
- Budget.
- Potential for bias.
- Currency.
- Validity.
- Resources: human, financial and environmental impact.
- Determine what data is to be collected.

B2 Market research activities

- Methods to be used:
 - quantitative and qualitative
 - primary research and relevance to marketing objectives, for example:
 - focus groups – attendee knowledge and appropriateness, size, management
 - questionnaire/survey – design, question types, sequencing, bias, sampling plan
 - probability and non-probability sampling, sample size and effect on confidence levels
 - observation – what to observe, relevance of observation activity, duration of observation, timing of observation
 - e-marketing – relevance of platform to target market, uptake, desensitisation
 - pilot research – size, relevance to size of the market, uptake, bias
 - secondary research and relevance to marketing objectives, for example:
 - sales records
 - website and cookies
 - internet research/use of AI
 - competitor reports.
- Data collection, primary and secondary.

Learning aim C: Review market research findings and make recommendations for a business [SP – CT]

C1 Statistical analysis and interpretation of primary and secondary research

- Statistical techniques, analysis and interpretation of findings:
 - averages including arithmetic mean, mode, median
 - range and interquartile range
 - standard deviation
 - confidence levels
 - complex data
 - time series
 - scatter diagrams and trends.
- Analysis and interpretation of secondary research.

C2 Presentation of research results

- Graphical and tabular presentation of results and findings.
- Written presentation of results, e.g. reports, presentation software.
- Feedback, e.g. suggestions and recommendations/self-review.
- Awareness of audience and tailoring the presentation to meet their needs/requirements.
- Recommend improvements for the business.

C3 Validate findings

- Limitations of the research:
 - sufficiency
 - accuracy
 - bias
 - subjectivity
 - reliability of sample.

Assessment criteria

Learning aim A: Examine types of market research used by businesses to inform decision making

Pass	Merit	Distinction
A.P1 Explain market research methods used by a selected business to meet marketing objectives.	A.M1 Assess the appropriateness of different market research methods in helping to meet marketing objectives and inform decision making for a selected business.	A.D1 Justify the use of selected market research methods in helping to meet marketing objectives and inform supported decision making for a selected business.

Learning aim B: Implement market research activities to meet a specific business's marketing objectives

Learning aim C: Review market research findings and make recommendations for a business

Pass	Merit	Distinction
<p>B.P2 Conduct secondary market research activities for selected marketing objectives of a selected business. [EL – SRS]</p> <p>B.P3 Conduct primary market research activities for selected marketing objectives for a selected business. [EL – PRS]</p>	<p>B.M2 Analyse the reasons for the chosen market research activities in meeting the selected marketing objectives for a selected business.</p>	<p>BC.D2 Justify the reasons for the chosen market research activities in meeting the selected marketing objectives.</p> <p>BC.D3 Make justified recommendations to meet the specific marketing objectives for a selected business, using complex data effectively to validate findings.</p>
<p>C.P4 Interpret findings from the market research activities undertaken, making recommendations to meet the specific marketing objectives for a selected business.</p> <p>C.P5 Present findings from the market research activities in different formats for a selected business/given audience.</p>	<p>C.M3 Analyse the findings of the market research activities making detailed recommendations to meet the specific marketing objectives for a selected business.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS ✓	IS – T	SP – C&I
MY – PGS	EL – PRS ✓	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.M1, A.D1)

Learning aims: B and C (B.P2, B.P3, C.P4, C.P5, B.M2, C.M3, B.D2, C.D3)

Further information for teachers and assessors

Resource requirements

Students will require access to research facilities so that they can carry out the research needed for the unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students will select primary and secondary market research methods used by a business to meet their marketing objectives. Work will be detailed and supported by appropriate marketing examples throughout, demonstrating how these have been used to make supported marketing decisions.

For merit standard, students will develop their reasons for the use of different types of primary and secondary market research methods used by a selected business, including their appropriateness to the business and in meeting the marketing objectives. They will identify which types of research have been most significant, using detailed examples used by the business.

For pass standard, students will show clear reasons in their report for the use of different types of primary and secondary research used by a selected business, demonstrating how they are used to meet marketing objectives. The explanation will be fit for purpose, professional and written in appropriate business language. The report will explain at least two primary and two secondary types of research for the business and will use realistic examples.

Learning aims B and C

For distinction standard, students will undertake a market research activity to meet marketing objectives for a selected business. Students will need to know how to use statistical measures, including averages, range and interquartile range, standard deviation, confidence levels and complex data analysis. They will also present statistical findings in graphical and tabular formats. They will make justified recommendations, using evidence, regarding changes that could be made to the market research activity. Research findings will form part of an appendix to the report. Students will give complex and supported suggestions for meeting the specific marketing objectives of the business; these will be validated by statistical data.

For merit standard, students will present the outcomes of a detailed examination of the market research activities undertaken and their suitability for meeting the marketing objectives of the business. Students will also communicate the results of a methodical examination using statistical techniques including averages, range and trends, commenting on confidence levels. They will also interpret secondary research. Their recommendations to the business on meeting its marketing objectives will be detailed but may miss some elements.

For pass standard, students will undertake a market research activity to meet marketing objectives for a selected business. They will carry out both primary and secondary research for the business. At least two methods of each type must be undertaken. They will state and interpret the purpose and findings of the market research activities. These will be straightforward but will be enough to inform recommendations that can be made to the business for meeting its marketing objectives. They will present these findings in different formats, including written and graphical.

Links to other units

This unit links with all other units in the specification.

Unit 19: Digital Analytics

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to develop students' understanding of how businesses use data to measure and improve digital marketing performance. Students will explore key metrics and tools to analyse digital marketing, gain customer insights and make informed recommendations that drive growth and effectiveness.

Unit introduction

Organisations of all sizes use data and statistics to look for patterns and trends in their markets and customer behaviour. The rapid development of technology and computing power has made digital analytics not just possible but necessary to organisations that want to systematically analyse data to improve business performance. As cloud-based platforms become more affordable, all businesses are able to collect, store and analyse data at scale. As such the importance of digital analytics has increased, and many organisations recruit and create roles specifically for data analysts and data scientists who use digital analytics as their main tool. Digital analytics includes the collection, analysis, visualisation and interpretation of digital data to aid the decision-making process of businesses.

In this unit, you will explore the use and importance of digital analytics and learn the about the different types of digital analytics used by businesses. You will understand the role of market research, data collection and analysis, and the legal and ethical considerations involved in using digital analytics.

You will develop a digital analytics plan and select from a variety of digital information, media channels and devices. You will then review the success of a digital marketing activity using appropriate market research and digital analytics measures and tools. To complete the assessment task, you will need to draw on your learning from across your programme of study.

Learning aims

In this unit you will:

- A** Explore digital analytics and the legal and ethical considerations for business
- B** Develop digital analytics plans for business
- C** Review the success of digital marketing using appropriate data analysis techniques and digital analytics measurements.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Explore digital analytics and the legal and ethical considerations for business	A1 Purpose and importance of digital analytics A2 Types of digital analytics A3 Challenges in digital analytics A4 Legal and ethical issues affecting digital analytics	Case study on the digital analytics used by a selected organisation, including an analysis of the types of digital analytics used and the considerations of digital data collection and analysis in that context.
B Develop digital analytics plans for business	B1 Sources of digital information B2 Digital media B3 Market research	A completed plan with associated materials.
C Review the success of digital marketing using appropriate data analysis techniques and digital analytics measurements	C1 Measuring the success of digital marketing activities C2 Data analysis techniques C3 Digital analytics measures	A presentation of the digital analytics used from a given data set to assess and evaluate the success of a digital marketing campaign and make recommendations.

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Explore digital analytics and the legal and ethical considerations for business

A1 Purpose and importance of digital analytics

- Purpose of digital analytics:
 - understanding the customer
 - improve customer experience
 - engage new audiences
 - convert audience into customers
 - updating of content
 - targeted marketing
 - identification of gaps in markets
 - planning campaigns
 - quantify ROI from digital marketing campaign
 - marketing channel performance
 - measure traffic vs. conversions
 - competitor analysis.
- Importance of digital analytics:
 - growth of big data
 - increased access and usage of the internet
 - number of users
 - demand for information
 - technology-enabled services
 - use of mobile technologies
 - faster decision making
 - cost reduction
 - competitor behaviour.

A2 Types of digital analytics

- Descriptive analytics:
 - what happened?
- Diagnostic analytics:
 - why did it happen?

- Predictive analytics:
 - what will happen?
- Prescriptive analytics:
 - how can I make something happen?

A3 Challenges in digital analytics

- Challenges:
 - data collection and availability
 - timeliness of data
 - data integrity
 - avoidance of bias
 - web and other digital algorithms changing
 - digital platforms becoming obsolete
 - new digital platforms being introduced
 - handling large data volumes.

A4 Legal and ethical issues affecting digital analytics

- Legal issues:
 - data protection
 - privacy and data collection
 - costs
 - security and storage of customer information.
- Ethical issues:
 - opt-in/opt-out procedures
 - permissions
 - environmental impact
 - tracking customer behaviour.

Learning aim B: Develop digital analytics plans for business [EL - MOL]

B1 Sources of data

- Digital information sources and search results:
 - customer reviews
 - social media
 - following conversations
 - interactions with social media
 - comparison websites (aggregators)
 - company websites

- statistics sites
- e-journals
- web crawlers
- quality scores.

B2 Digital media

- Paid media – organisations pay to deliver content to an audience:
 - paid search advertisements (ads)
 - social media ads
 - sponsorships
 - display/banner ads.
- Earned media – organisations try to earn coverage and exposure from reporters and influencers:
 - viral marketing
 - social media conversations
 - blog/vlogs
 - user-generated reviews.
- Owned media – under the direct control of the organisation:
 - websites/mobile sites
 - newsletters
 - catalogues
 - blogs
 - email lists
 - applications (apps) and software.

B3 Market research

- Quantitative and qualitative market research data used to identify:
 - market size, structure, and trends
 - competitors and their activities
 - possible market segments
 - possible gaps in the market
 - consumer/buyer behaviour
 - customer satisfaction.
- Primary digital sources:
 - web analytics
 - keyword research
 - social media

- digital surveys/questionnaires/polls
- interviews
- focus groups
- blog comments.
- Secondary digital sources:
 - data companies
 - newspapers
 - reports/e-journals
 - official statistics
 - professional bodies
 - industry, sector and market reports
 - government data/reports
 - online reviews.

Learning aim C: Review the success of digital marketing using appropriate data analysis techniques and digital analytics measurements [MY - PGS]

C1 Measuring the success of digital marketing activities

- Reasons for measuring the success of activities:
 - refinement and adaptation of marketing activities
 - branding
 - content management
 - lead generation
 - ecommerce
 - customer satisfaction and engagement
 - segmentation
 - budget allocation
 - continual improvement process
 - A/B testing.
- Performance measures:
 - problem identification
 - measurement identification
 - Key Performance Indicators (KPIs)
 - benchmarking
 - internal
 - external.

C2 Data analysis techniques

- Tools used to collect, analyse, and present measures of success:
 - dashboards
 - aggregators
 - web analytics
 - marketing data sets
 - spreadsheet software.
- Basic statistical techniques:
 - measures of location (averages)
 - mean
 - mode
 - median
 - measures of spread
 - range
 - interquartile range (IQR)
 - variance and standard deviation
 - correlation and regression.
- Data visualisation and presentation:
 - graphical and tabular presentation
 - time series data
 - cross-sectional data
 - scatter diagrams
 - regression lines
 - data skewness.

C3 Digital analytics measures

- Key metrics:
 - website:
 - macro conversions
 - micro conversions
 - conversion rate
 - hit rate/visits (total)
 - unique visitors
 - bounce rate
 - exit rate
 - dwell time (stickiness)
 - click-through rate

- download rates
- visitor origin (country/region)
- visitor source (channel/platform)
- time of day
- top page views
- pages per visit (PPV)
- o emails:
 - open rates
 - bounce backs
 - unsubscribes
 - times opened
 - read rate
- o social media:
 - views
 - shares
 - followers
 - times a hashtag is used
 - emoticons
 - Daily Active Users (DAU).

Assessment criteria

Learning aim A: Explore digital analytics and the legal and ethical considerations for business

Pass	Merit	Distinction
<p>A.P1 Describe the purpose and importance of digital analytics for a selected business.</p> <p>A.P2 Explain the different types of digital analytics used in a selected business.</p>	<p>A.M1 Analyse how digital analytics can be used to help inform decision making in a selected business.</p>	<p>A.D1 Assess the importance of digital analytics to a business.</p>

Learning aim B: Develop a digital analytics plan for business

Pass	Merit	Distinction
<p>B.P3 Produce a basic digital analytics plan for a chosen business, outlining the sources of data selected.</p>	<p>B.M2 Produce a detailed digital analytics plan for a chosen business with detailed reasons for the sources of data selected.</p>	<p>B.D2 Produce a comprehensive digital analytics plan for a chosen business justifying sources of data selected.</p>

Learning aim C: Review the success of digital marketing using appropriate data analysis techniques and digital analytics measurements

Pass	Merit	Distinction
<p>C.P4 Use appropriate digital analytics to analyse a given data set. [EL – SRS]</p> <p>C.P5 Use appropriate data analysis tools to measure the success of selected digital marketing. [EL – SRS]</p>	<p>C.M3 Analyse the given data set using appropriate data analysis techniques and digital analytics to measure the success of selected digital marketing.</p>	<p>C.D3 Evaluate the success of selected digital marketing using appropriate data analysis and digital analytics against performance measures and give recommendations for improvement, if there are any.</p>

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL *	IS – WC	SP – CT
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS ✓	IS – T	SP – C&I *
MY – PGS *	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of three summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aim: B (B.P3, B.M2, B.D2)

Learning aim: C (C.P4, C.P5, C.M3, C.D3)

Further information for teachers and assessors

Resource requirements

Students will be required to have access to business data.

Essential information for assessment decisions

Learning aim A

For distinction standard, students will be able to evaluate the issues and challenges found with information relating to a business requiring the use of digital analytics. Students will be able to explain what types of digital analytics are appropriate in a given context and find examples of those analytics in this context. They will be able to assess how the use of those analytics can help the decision-making process for the business, giving some justification for their choice. Students will also be able to comment on the challenges faced by the business, as well as the possible legal and ethical considerations that could arise because of the use of digital analytics in the given context.

Overall, the evidence will be well structured, with use of appropriate technical language, and will demonstrate high-quality written communication. There should be reasoned justification for the importance of digital analytics. Some parts of the evidence may be considered in greater depth than others.

For merit standard, students will use a variety of information to carry out an assessment of how digital analytics can be used to help inform the decisions for the businesses they have researched. There should be some consideration of the different types of digital analytics that can be used. There should also be consideration of the challenges faced by the business as well as possible legal and ethical considerations.

Overall, the evidence will be well structured, with some use of appropriate technical language. There should be a good quality of written communication demonstrated.

For pass standard, students will ensure that they have researched at least one suitable business or business area. Students will also explain the different types of analytics used in a business. There should be some reference to the challenges faced and/or the legal and ethical considerations of the use of digital analytics in business.

Overall, the evidence will be structured, with some use of appropriate technical language, although there may be some inaccuracies with terms used.

Learning aim B

For distinction standard, students will produce a detailed, comprehensive plan of the sources of data to be analysed for a selected business. There should be well-reasoned justification for the choice of data with detailed explanation relevant to the selected business. The data should come from a variety of sources including primary and secondary market research, digital information, media, channels and devices.

Overall, the evidence will be well structured, with use of appropriate technical language, and will demonstrate high-quality written communication.

For merit standard, students will produce a detailed plan giving the sources of data that can be used for digital analytics for a business they have researched. Detailed and valid reasons should be given for their choice of those sources.

The evidence will be well structured, demonstrating a good quality of written communication. There should be good use of appropriate technical language, although there may be some inaccuracies with terms used. Some parts of the evidence may be considered in greater depth than others.

For pass standard, students will produce a plan of the sources of data that can be used for digital analytics for a business they have researched.

Overall, the evidence will be structured, with some use of appropriate technical language, although there may be some inaccuracies with terms used.

Learning aim C

For distinction standard, students will provide evidence of the selection and evaluation of appropriate data analysis and digital analytics tools used to measure the success of digital marketing, assessing the strengths and weaknesses of these. Their evidence will be based on the given data set and come to a judgement in a conclusion. A full and well-reasoned justification for the selection of tools should be provided, along with the judgement as to how successful it has been based on these criteria. Recommendations need to be offered on any improvements that can be made.

The evidence will be well structured, demonstrating a high level of written communication. Data presentation should be appropriate to an audience of students' peers. There should be good use of appropriate technical language, and data analysis techniques will be highly accurate, although there may be some errors in calculation. Students should perform analyses using appropriate data analysis tools including spreadsheet software or equivalent for statistical calculations. Some parts of the evidence may be considered in greater depth than others.

For merit standard, students will select and analyse appropriate data analysis and digital analytics tools to measure the success of digital marketing based on the given data set. The evidence will be well structured, demonstrating a good quality of written communication. There should be good use of appropriate technical language although there may be some inaccuracies with terms used. Data analysis techniques will be mostly accurate, although there may be some errors in calculation. Students should perform analyses using appropriate data analysis tools, including spreadsheet software or equivalent for statistical calculations.

For pass standard, students will select, use and explain with reasons the appropriate data analysis and digital analytics tools that can be used to measure the success of digital marketing, based on the given data set. Overall, the evidence will be structured, with some use of appropriate technical language, although there may be some inaccuracies with terms used. Data analysis techniques will be mostly accurate, although there may be some errors in calculation. Students can perform analyses using paper-based calculation in appropriate detail, or using some basic functions in a spreadsheet or other data analysis tool.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 7: Investigating Digital Marketing
- Unit 10: Developing a Digital Marketing Campaign
- Unit 18: Market Research.

Unit 20: International Marketing

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

This unit helps students understand the basics of international marketing, including why businesses expand globally and the key factors influencing their decisions. Students will learn how companies research international markets and adjust their strategies for different countries.

Unit introduction

In today's interconnected world, businesses seldom operate solely within a single market. International marketing is essential for enabling organisations to expand beyond domestic boundaries, reach broader customer bases, and compete on a global stage. This unit outlines the fundamental principles of marketing in an international context and examines how cultural, economic, legal, and political factors shape marketing decisions across various countries.

In this unit, you will examine the strategies businesses use to enter and operate in international markets, including market research and segmentation. The unit will also cover the importance of adapting the marketing mix – product, price, place and promotion – to meet the needs of diverse global audiences. By studying real-world examples, you will gain insight into how global brands succeed and the challenges they face when navigating cultural differences and regulatory environments.

By the end of this unit, knowledge and skills will have been developed to enable the analysis of international marketing opportunities and the formulation of strategies that support organisational objectives. This learning lays the groundwork for future roles in marketing, business development, and management, while also providing a solid basis for further study in global business and marketing disciplines.

Learning aims

In this unit you will:

- A** Understand the key principles and importance of international marketing
- B** Investigate methods of researching and entering international markets
- C** Examine how the marketing mix is adapted for international markets
- D** Develop and present an international marketing strategy for a chosen business.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Understand the key principles and importance of international marketing</p>	<p>A1 Definition and scope of international marketing</p> <p>A2 Benefits of international marketing</p> <p>A3 Challenges of international marketing</p> <p>A4 Global marketing environments</p> <p>A5 Ethical and sustainability considerations</p>	<p>Students will complete a professionally formatted report or slide deck explaining the importance of international marketing and describing external factors that influence cross-border marketing decisions. Tutors may use brief recorded questioning to confirm understanding and authorship.</p>
<p>B Investigate methods of researching and entering international markets</p>	<p>B1 International market research</p> <p>B2 Market selection and segmentation</p> <p>B3 Market entry strategies</p> <p>B4 Risk assessment and mitigation</p>	<p>Students will produce an international market research and entry-mode report for a specific, named business wishing to enter a clearly defined target country.</p>
<p>C Examine how the marketing mix is adapted for international markets</p>	<p>C1 Product adaptation and standardisation in international markets</p> <p>C2 Pricing strategies in international markets</p> <p>C3 Place (distribution) in international markets</p> <p>C4 Promotion in international markets</p>	<p>Students will complete a case study that examines how a global brand adapts its marketing mix across at least two different international markets. The output may be a written case study or a research-informed presentation with speaker notes, supported by specific examples.</p>

Learning aim	Key content areas	Assessment approach
<p>D Develop and present an international marketing strategy for a chosen business</p>	<p>D1 Situation analysis</p> <p>D2 SMART objectives for international expansion</p> <p>D3 Tailoring product, price, place and promotion for the target market</p> <p>D4 Implementation and control</p> <p>D5 Presentation skills</p>	<p>Students will plan an integrated international marketing strategy for a chosen business entering a defined market. A live presentation will summarise the strategy and will be followed by a short Q&A.</p>

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand the key principles and importance of international marketing

A1 Definition and scope of international marketing

- Differences between domestic and international marketing:
 - international marketing strategies
 - adaptive marketing strategies.
- Globalisation and its impact on trade and marketing.
- Importance of international marketing for growth and development.
- Key drivers of international marketing (technology, communication, transportation).
- Levels of international involvement (exporting, joint ventures, direct investment, franchising).
- The importance of cultural awareness in global marketing.
- Factors influencing international market selection and the link between these factors and marketing decisions:
 - risks associated with international marketing (cultural, economic, legal and political).

A2 Benefits of international marketing

- Increased market share and access to new customer segments.
- Revenue growth through expanded sales opportunities.
- Economies of scale in production and distribution.
- Enhanced brand recognition and global competitive advantage.
- Diversification of business risk across different markets.
- Access to new resources, technologies and innovations.
- Opportunity to extend product lifecycle by entering emerging markets.
- Improved understanding of global consumer trends and preferences.

A3 Challenges of international marketing

- Cultural differences (language, values, customs).
- Political and legal environments (trade laws, tariffs, regulations).
- Economic factors (exchange rates, inflation, purchasing power).
- Logistical complexities (transportation, supply chain, distribution networks).
- Differences in consumer behaviour and buying patterns.
- Challenge of developing effective global marketing communications.

- International partnerships or joint ventures.
- Compliance with international standards and certifications.
- Risks related to currency fluctuations and payment collection.

A4 Global marketing environments

- PESTLE analysis for international markets:
 - political: e.g. government stability, international relations, and political risks in target countries
 - economic: e.g. economic trends, growth rates, interest rates, and local economic policies that may impact market entry and operations
 - social: e.g. cultural norms, demographics, societal values, and lifestyle trends that influence consumer behaviour
 - technological: e.g. the level of technological advancement, innovation, infrastructure and digital penetration in the market
 - legal: e.g. local laws, intellectual property rights, and compliance requirements for doing business internationally
 - environmental: e.g. environmental regulations, sustainability expectations, and ecological factors affecting operations and reputation.
- Emerging trends and disruptions that may affect international strategies.
- Geopolitical developments, such as trade disputes or sanctions, that can influence market potential.
- The impact of global health issues, such as pandemics, on supply chains and consumer demand.
- The risks and opportunities presented by climate change policies and green technologies in international contexts.
- Role of international trade organisations (WTO, IMF, World Bank).

A5 Ethical and sustainability considerations

- Corporate social responsibility in global markets.
- Ethical sourcing and fair trade.
- Ensuring transparency throughout supply chains.
- Adhering to international labour standards and human rights.
- Integrating sustainable development goals into business practices:
 - engaging with local communities and respecting indigenous rights
 - monitoring and reducing environmental impact of operations
 - implementing anti-corruption and anti-bribery policies
 - promoting diversity, equity and inclusion within global teams.

Learning aim B: Investigate methods of researching and entering international markets [EL – MOL]

B1 International market research

- Primary and secondary research in global contexts:
 - purpose and methods:
 - primary: surveys, interviews, observation, data analysis and focus groups
 - secondary: academic peer-reviewed journals, published books and articles, government agencies, educational institutions, newspapers, magazines, tv shows and the internet.
- Sources of international data (government reports, trade associations, online databases).
- Cultural, demographic, and economic data.
- Competitor analysis and benchmarking.
- Regulatory and legal frameworks in target countries.
- Consumer needs and preferences through surveys and focus groups.
- Technological readiness and digital infrastructure.
- Industry trends and global market developments.
- International market entry consultants and professional networks.
- Logistical and distribution challenges.

B2 Market selection and segmentation

- Criteria for selecting target markets: market size, growth potential, competitive landscape, ease of entry, risk assessment, regulatory stability, and accessibility.
- Consumer purchasing power and income distribution.
- Local business practices and cultural norms.
- Language barriers and communication channels.
- Segmentation bases: geographic, demographic, psychographic, behavioural, benefit sought, usage rate and loyalty status.
- Niche markets and emerging segments.
- Sector-specific opportunities and threats.

B3 Market entry strategies

- Suitability of different entry strategies.
- Exporting (direct and indirect).
- Licensing and franchising.
- Joint ventures and strategic alliances.
- Foreign Direct Investment (FDI).
- Turnkey projects.

- Greenfield and Brownfield investments.
- Consortia and syndicates for large-scale ventures.
- Capitalising on established distribution networks.
- Contract manufacturing and management contracts.

B4 Risk assessment and mitigation

- Political risk, currency risk, cultural risk.
- Legal and regulatory risk.
- Operational risk.
- Reputational risk.
- Insurance and hedging strategies.
- Scenario planning and contingency measures.
- Local partners and consultants.
- Due diligence and ongoing monitoring.

Learning aim C: Examine how the marketing mix is adapted for international markets [SP - CT]

C1 Product adaptation and standardisation in international markets

- The impact of cultural and economic differences in the marketing mix.
- The needs of different international markets.
- Global brands and local customisation.
- Packaging, labelling and language considerations.
- Product modifications to meet local regulations and standards.
- Formulas or ingredients to suit regional tastes or preferences.
- Different product sizes or models for specific markets.
- Health, safety, or environmental requirements in host countries.
- Warranties and after-sales service policies.
- After-sales support and customer service to meet local expectations and build brand loyalty.
- Local cultural elements to be incorporated into design or branding.

C2 Pricing strategies in international markets

- Factors influencing pricing (taxes, tariffs, exchange rates).
- Price skimming and penetration pricing globally.
- Cost-plus and market-based pricing approaches.
- Prices to reflect local purchasing power.
- Transfer pricing within multinational companies.
- Impact of grey markets and parallel imports on pricing decisions.

- Psychological pricing strategies adapted for different cultures.
- Currency fluctuations and hedging strategies.
- Legal constraints on pricing, such as anti-dumping laws or price controls.
- Promotional pricing and discounting for market entry.

C3 Place (distribution) in international markets

- International distribution channels.
- Logistics and supply chain challenges.
- Selection of intermediaries: agents, distributors, and partners.
- Direct vs. indirect distribution models.
- Inventory and warehousing across borders.
- Customs regulations and import/export documentation.
- Product availability and delivery reliability in diverse markets.
- Reverse logistics and handling product returns internationally.
- Technological innovations in global supply chains.
- The environmental impact of international logistics.

C4 Promotion in international markets

- Cultural sensitivity in advertising.
- Global vs. local promotional campaigns.
- Digital marketing and social media internationally.
- Messaging to different cultural norms and languages.
- Promotional efforts across multiple time zones.
- Campaign effectiveness in varied markets.
- Compliance with international advertising regulations.
- Partnerships with local influencers and media.

Learning aim D: Develop and present an international marketing strategy for a chosen business [SP - C&I]

D1 Situation analysis

- SWOT analysis for the chosen market:
 - assessment of the competitive landscape and key market players
 - analysis of customer behaviour, preferences and cultural factors
 - challenges and opportunities
 - review of historical performance and lessons learned from similar markets.
- PESTLE analysis for the chosen market:
 - economic, legal and political environment impacting operations
 - technological trends and digital readiness in target markets

- evaluation of distribution channels and supply chain considerations.

D2 SMART objectives for international expansion

- Market share and revenue targets for the initial entry period.
- Brand awareness goals within the target country or region.
- Customer acquisition benchmarks, including segmentation by demographics or channel.
- KPIs for digital engagement and localised marketing initiatives.
- Milestones for forming strategic partnerships or securing distribution agreements.
- Timelines for regulatory compliance and local operational setup.

D3 Tailoring product, price, place, and promotion for the target market

- Product features, packaging and branding to align with local preferences and cultural norms.
- Competitive pricing strategies that consider local purchasing power, competitor analysis and perceived value.
- Distribution channels (place) that maximise reach and efficiency within the target region, including partnerships with local retailers or e-commerce platforms.
- Promotional campaigns that resonate with the audience through culturally relevant messaging and local influencers.

D4 Implementation and control

- Action plans, timelines and resource allocation.
- Monitoring and evaluation methods (KPIs, feedback loops).
- Roles and responsibilities to team members.
- Contingency plans to address potential risks or challenges.
- Communication protocols for cross-functional teams and stakeholders.
- Regular progress reviews and adjustment sessions.
- Budget adherence and cost control measures throughout implementation.

D5 Presentation skills

- Structuring a professional marketing strategy.
- Visual aids and persuasive communication techniques.
- Presentations for diverse audiences.
- Storytelling to enhance engagement and retention.
- Data-driven insights to support arguments.
- Tone of voice and body language for impact.
- Practising and refining delivery for confidence and clarity.

Assessment criteria

Learning aim A: Understand the key principles and importance of international marketing

Pass	Merit	Distinction
<p>A.P1 Explain the importance of international marketing for a selected business growth and development.</p> <p>A.P2 Describe the key factors that influence international marketing decisions for a selected business.</p>	<p>A.M1 Analyse how factors impact international marketing decisions for a selected business.</p>	<p>A.D1 Evaluate the significance of adapting international marketing decisions for a selected business.</p>

Learning aim B: Investigate methods of researching and entering international markets

Pass	Merit	Distinction
<p>B.P3 Explain the purpose and methods of international market research.</p> <p>B.P4 Describe different market entry strategies used by a selected business.</p>	<p>B.M2 Assess the suitability of different market entry strategies for a selected business and market.</p>	<p>B.D2 Justify the most appropriate market entry strategy for a selected business.</p>

Learning aim C: Examine how the marketing mix is adapted for international markets

Pass	Merit	Distinction
C.P5 Explain how the elements of the marketing mix can be adapted for a selected business. [IS – C&SI]	C.M3 Analyse the impact of cultural and economic differences on the marketing mix for a specific product.	C.D3 Evaluate the effectiveness of a selected business’s marketing mix in meeting the needs of a different international market.

Learning aim D: Develop and present an international marketing strategy for a chosen business

Pass	Merit	Distinction
D.P6 Produce a plan for a chosen business and market. [IS – C&SI]	D.M4 Develop a detailed and realistic international marketing plan that addresses key challenges and opportunities for a selected business.	D.D4 Present a comprehensive and well-structured international marketing plan, fully justified with research and analysis for a selected business.

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL *	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI ✓	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of four summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, P2, A.M1, A.D1)

Learning aim: B (B.P3, B.P4, B.M2, B.D2)

Learning aim: C (C.P5, C.M3, C.D3)

Learning aim: D (D.P6, D.M4, D.D4)

Further information for teachers and assessors

Resource requirements

For this unit, students must have access to current business and marketing information, for example from websites and printed resources.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must weigh the benefits and challenges of standardisation versus adaptation and show how adaptation decisions interact with areas such as culture, regulation, infrastructure and consumer behaviour across at least two markets. The evaluation should draw on a range of well-chosen research that illustrates nuanced differences between markets and should include consideration of challenges. Evidence will synthesise insights from research, and demonstrate originality in evaluating which adaptations matter most and why. Conclusions must be fully supported by the analysis presented. Referencing should be accurate and consistent, and the quality of sources should be appropriate to support the evaluation.

For merit standard, students must analyse how political, economic, social, technological, legal and environmental factors influence the success of international marketing decisions for a business. Students should integrate relevant concepts and apply them to at least two specific, named business contexts. The work should be logically structured, use appropriate marketing terminology consistently and show a developed line of reasoning.

For pass standard, students must explain the importance of international marketing for business growth and development in clear and accurate terms, showing that they understand why firms expand beyond domestic markets. They should describe political, economic, social, technological, legal and environmental factors that influence international marketing decisions. They should include relevant, factual detail and use correct terminology such as 'globalisation'. Their explanations may be largely descriptive and may use straightforward, well-known examples to illustrate points, even if the examples are not explored in depth. Coverage of the external environment (for example, through a basic PESTLE) must be present, although it may not be fully balanced or comprehensive. Sources, if used, can be limited but should be credible and referenced appropriately.

Learning aim B

For distinction standard, students must justify the most appropriate market entry strategy for a chosen business through a compelling, evidence-based argument that draws upon multiple sources. The justification should present feasible alternatives evaluated against clearly defined and substantive criteria. The student should demonstrate critical awareness by acknowledging limitations in the data and any contingencies; and by explaining how identified challenges will be mitigated. Distinction work will show strategic coherence between the recommended mode and the business's resources.

For merit standard, students must analyse the suitability of different market entry strategies for a specific business and target market. The analysis should consider market size and growth, competitive intensity, resource and capability requirements, control and challenges of alternatives, speed of entry, and cost implications. Students should show how research findings (for example, demand indicators or regulatory constraints) inform the choice of entry strategies; and they should identify the operational and managerial implications of each option. Evidence should be selective and relevant, demonstrating a clear line of argument and indicating why some options are less appropriate than others for certain objectives.

For pass standard, students must explain international market research and explain which appropriate primary and secondary research selected businesses might use to understand international markets. They should accurately describe at least three market entry strategies – such as exporting, licensing, franchising, joint ventures, and foreign direct investment – and indicate when each might be considered. The work should be factually correct and demonstrate an understanding of market selection, segmentation and data gathering. The response should be coherent, use correct terminology and present information clearly.

Learning aim C

For distinction standard, students must evaluate the effectiveness of a global brand's marketing mix in meeting the needs of different international markets. They should draw well-supported conclusions about what works and what does not, explaining why. The evaluation should be comparative across at least two markets, integrating performance indicators where feasible (for example, changes in market share, increase in revenue, campaign engagement, or distribution coverage). Students should assess the coherence of the overall mix.

For merit standard, students must analyse the impact of cultural and economic differences on the marketing mix for a specific product or service in an international context. Students should make explicit, logical connections between elements. Evidence should include the analysis and should be coherent and well sequenced. The work should lead up to reasoned conclusions.

For pass standard, students must explain how product, price, place and promotion may be adapted for international markets, using correct terminology and clear, relevant examples. They should show an understanding of basic adaptation reasons such as product features and packaging changes; labelling and language requirements; pricing adjustments due to tariffs and taxes; distribution channel selection; and promotional messages adjusted for cultural norms. The work may be largely descriptive and must remain factually correct. The response should be coherent and suitably structured.

Learning aim D

For distinction standard, students must present a comprehensive, persuasive, and well-justified international marketing plan that integrates robust research, coherence, and practical implementation detail. The submission should demonstrate critical evaluation of strategic alternatives (for example, promotional mixes). The plan must include well-defined KPIs, appropriate to the market. The overall communication – whether written report or live presentation – should be professional, logically structured, visually clear (where applicable) and fully referenced, with conclusions and recommendations that are compelling and prioritised.

For merit standard, students must develop a detailed and realistic international marketing plan that addresses a situation analysis and is demonstrably achievable, given the resources of the chosen business. Objectives should be SMART and linked to measurable KPIs (for example, market share, revenue, acquisition cost, distribution coverage or brand awareness). The marketing mix should be clearly defined and strategically aligned positioning and target segments. The strategy should include an indicative budget, a phased implementation plan with milestones, roles and responsibilities. Evidence of research should inform assumptions, and the overall plan should show a coherent line of reasoning.

For pass standard, students must produce an outline international marketing strategy that identifies the chosen business and target market, states clear objectives, and proposes basic actions across product, price, place and promotion. The plan should include a brief situation analysis (SWOT or PESTLE) and an outline timeline. While the plan may be generic in places and may not quantify resource requirements in detail, it should be consistent, feasible at a basic level, and expressed using appropriate marketing terminology. Any research or data used should be relevant, even if limited in depth, and should be correctly referenced.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 6: Investigating Customer Communications
- Unit 10: Developing a Digital Marketing Campaign
- Unit 18: Market Research.

Unit 21: Managing Customers

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to develop students' understanding of how businesses build and maintain positive customer relationships. Students will explore strategies for effective customer management, including communication, service, and loyalty approaches, while gaining skills to enhance customer satisfaction, retention and long-term business success.

Unit introduction

Customers are central to the success of any business. Effective management of customer relationships is crucial for fostering loyalty, enhancing satisfaction, and ensuring sustainable profitability. This unit outlines the key principles and practices involved in managing customers within a competitive business environment, with an emphasis on the ways organisations create positive experiences and maintain strong relationships with their clients.

In this unit, you will explore the importance of customer service and relationship management, including how businesses identify customer needs, handle complaints, and use feedback to improve products and services. The unit will also cover the role of technology in managing customers, such as the use of Customer Relationship Management (CRM) systems, social media engagement, and data analytics to personalise interactions and enhance customer satisfaction.

By the conclusion of this unit, knowledge and skills for effective customer management across various business settings will be established. Strategies for enhancing customer retention, resolving issues with professionalism, and supporting organisational success will be explored. Competence in these areas holds significant value within sectors such as retail, hospitality, and finance, and provides a foundation for both employment and further academic progression in business and customer service.

Learning aims

In this unit you will:

- A** Understand the importance of managing customers effectively for business success
- B** Investigate methods and techniques used to manage customer relationships
- C** Examine how businesses monitor and improve customer satisfaction
- D** Develop and present strategies to improve customer management.

Summary of unit

Learning aim	Key content areas	Assessment approach
<p>A Understand the importance of managing customers effectively for business success</p>	<p>A1 Importance of managing customers</p> <p>A2 Benefits of effective customer management</p> <p>A3 Consequences of poor customer management</p> <p>A4 Customer expectations and behaviour</p> <p>A5 Legal and ethical considerations</p>	<p>Students will submit a written assignment that examines how a business monitors and improves customer satisfaction. This assignment will assess students' ability to measure customer satisfaction, analyse customer feedback, handle complaints effectively and implement continuous improvement strategies.</p>
<p>B Investigate methods and techniques used to manage customer relationships</p>	<p>B1 Principles of good customer service</p> <p>B2 Communication in managing customer relationships</p> <p>B3 Customer Relationship Management (CRM)</p> <p>B4 Technology in customer management</p> <p>B5 Personalisation and loyalty strategies</p>	<p>Students will develop and present strategies to improve customer management in a business context. This will involve conducting a situation analysis, setting objectives, developing strategies, and planning for implementation.</p>
<p>C Examine how businesses monitor and improve customer satisfaction</p>	<p>C1 Monitoring customer satisfaction</p> <p>C2 Gathering and analysing customer feedback</p> <p>C3 Handling complaints effectively</p> <p>C4 Monitoring and improving</p> <p>C5 Benchmarking and best practice</p>	<p>Students will investigate methods and techniques used to monitor and improve customer satisfaction. It will require them to demonstrate their understanding of customer feedback methods, key metrics, and the application of continuous improvement strategies.</p>

Learning aim	Key content areas	Assessment approach
<p>D Develop and present strategies to improve customer management</p>	<p>D1 Developing strategies D2 Situational analysis D3 Setting objectives D4 Implementation planning D5 Monitoring and evaluation D6 Presentation</p>	<p>Students will investigate methods and techniques used to manage customer relationships. This will require them to demonstrate their understanding of CRM, personalisation and loyalty strategies, and the application of technology in customer management.</p>

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Understand the importance of managing customers effectively for business success [EL – MOL]

A1 Importance of managing customers

- Why customers are central to business operations.
- Impact of customer satisfaction on loyalty, retention and profitability.
- How customer feedback drives continuous improvement of products and services.
- The role of personalised experiences in building lasting customer relationships.
- Importance of timely communication and support in meeting customer expectations.
- Influence of customer advocacy in attracting new clients and expanding market reach.

A2 Benefits of effective customer management

- Increased sales and repeat business.
- Positive reputation and brand image.
- Competitive advantage in the marketplace.
- Higher customer lifetime value.
- Stronger word-of-mouth referrals.
- Enhanced employee satisfaction and morale.
- Improved ability to adapt to market changes.
- Greater opportunities for upselling and cross-selling.
- Reduced marketing and service costs.

A3 Consequences of poor customer management

- Loss of customers and revenue.
- Negative reviews and reputational damage.
- Increased costs of acquiring new customers.
- Decline in employee morale and higher staff turnover.
- Decreased market share and weakened competitive position.
- Greater likelihood of legal or regulatory issues.
- Lower customer lifetime value.
- Reduced opportunities for upselling and cross-selling.
- Diminished brand loyalty and trust.

A4 Customer expectations and behaviour

- Understanding customer needs and wants.
- Factors influencing customer expectations (price, quality, service, convenience).
- Impact of cultural and social influences on buying behaviour.
- Role of digital channels in shaping customer expectations.
- Importance of consistent experiences across touchpoints.
- How customer feedback informs business improvements.
- Rising demand for personalisation and customised solutions.
- Expectations for transparency and ethical business practices.

A5 Legal and ethical considerations

- Consumer rights and data protection.
- Ethical treatment of customers and fair trading.
- Compliance with advertising and marketing regulations.
- Safeguarding customer privacy and preventing misuse of data.
- Addressing issues of discrimination and ensuring accessibility for all.
- Adherence to industry codes of conduct and standards.
- Sustainability.
- Transparent pricing and honest representation of products/services.

Learning aim B: Investigate methods and techniques used to manage customer relationships [EL - MOL]

B1 Principles of good customer service

- Professionalism, courtesy and responsiveness.
- Active listening and empathy.
- Timely and accurate resolution of customer queries.
- Consistent follow-up and clear communication.
- Personalised approach tailored to individual customer needs.
- Building trust through reliability and integrity.
- Proactive identification of potential issues and solutions.
- Satisfaction and retention.
- Encouraging and acting on customer feedback.

B2 Communication in managing customer relationships

- Verbal and non-verbal communication.
- Handling difficult conversations and complaints.
- Adapting communication style to suit diverse audiences.
- Effective use of digital channels (email, live chat, social media).

- Maintaining a positive tone and body language.
- Clarifying and confirming customer understanding.
- Documenting interactions for continuity and accuracy.

B3 Customer Relationship Management (CRM)

- Different technologies:
 - purpose and benefits of CRM systems
 - centralises customer data for improved accessibility
 - enables segmentation for targeted marketing and communication
 - tracks customer interactions across multiple channels
 - automates routine tasks to enhance productivity
 - supports analysis of customer behaviours and preferences
 - improves collaboration between departments
 - features of CRM software (data storage, segmentation, tracking interactions)
 - integrates with other business tools such as email and social media platforms
 - provides reporting and analytics to measure performance
 - facilitates personalised communication and service delivery.

B4 Technology in customer management

- Social media engagement and online support:
 - use of chatbots and AI in customer service
 - mobile applications for on-the-go customer access
 - real-time notifications and alerts for customers and staff
 - automated appointment scheduling and reminders
 - centralised dashboards for unified customer insights
 - data security features to protect customer information
 - integration of loyalty programmes within digital platforms.

B5 Personalisation and loyalty strategies

- Tailoring offers and services to individual needs:
 - loyalty programmes and reward schemes
 - personalised email marketing campaigns
 - targeted promotions based on customer preferences
 - custom product recommendations using customer data
 - exclusive member events or early access sales
 - birthday and anniversary rewards
 - feedback-driven improvements to products and services
 - gamification elements to enhance customer engagement.

Learning aim C: Examine how businesses monitor and improve customer satisfaction [SP – CT]

C1 Monitoring customer satisfaction

- Customer feedback methods (surveys, focus groups, online reviews).
- Key metrics: Net Promoter Score (NPS), Customer Satisfaction Score (CSAT), Customer Effort Score (CES).
- Monitoring social media sentiment and mentions.
- Mystery shopping and observational studies.
- Tracking repeat purchase rates and customer retention.
- Analysing customer service interactions and resolution times.
- Collecting website and app usability data.
- Measuring response rates to loyalty and reward programmes.

C2 Gathering and analysing customer feedback

- Identifying trends and common issues.
- Using data to inform improvements.
- Segmenting feedback by customer type or demographic.
- Spotting patterns in product or service complaints.
- Assessing the effectiveness of previous actions taken.
- Highlighting areas for staff training or development.
- Prioritising issues based on frequency and impact.
- Incorporating feedback into product development cycles.

C3 Handling complaints effectively

- Establishing clear protocols for logging and tracking complaints.
- Providing timely acknowledgments to dissatisfied customers.
- Investigating complaints thoroughly to determine root causes.
- Communicating resolutions transparently and empathetically.
- Offering practical solutions or compensation where appropriate.
- Documenting outcomes to prevent recurrence of similar issues.
- Gathering feedback from customers post-resolution to assess satisfaction.
- Training staff in de-escalation techniques and effective communication.
- Recognising and rewarding staff who excel in complaint handling.
- Turning negative experiences into positive outcomes by following up with customers and demonstrating commitment to improvement.

C4 Monitoring and improving

- Implementing changes based on feedback.
- Monitoring the impact of improvements on customer satisfaction.
- Encouraging cross-department collaboration to tackle recurring issues.
- Leveraging technology for better tracking and analysis of complaints.
- Regularly reviewing complaint trends to anticipate future challenges.
- Sharing success stories and lessons learned across the organisation.
- Setting up measurable KPIs to evaluate the effectiveness of changes.

C5 Benchmarking and best practice

- Comparing performance against competitors.
- Adopting industry standards for service excellence.
- Conducting regular customer satisfaction surveys to inform benchmarks.
- Partnering with industry leaders to exchange best practices.
- Attending conferences and workshops to stay updated on new trends.
- Implementing pilot projects to test innovative service solutions.
- Gathering and analysing case studies of successful customer service initiatives.

Learning aim D: Develop and present strategies to improve customer management [SP - C&I]

D1 Developing strategies

- Enhancing communication channels.
- Introducing or improving CRM systems.
- Staff training and development for customer service excellence.
- Personalising customer interactions to build stronger relationships.
- Implementing customer feedback mechanisms for service improvement.
- Segmenting customer base for targeted marketing and support.
- Leveraging data analytics to identify trends and anticipate needs.
- Collaborating with other departments to ensure seamless service delivery.

D2 Situational analysis

- Reviewing current customer service performance.
- Identifying strengths, weaknesses and opportunities for improvement.
- Analysing customer feedback and complaint trends.
- Evaluating employee engagement and frontline staff perspectives.
- Assessing the effectiveness of existing customer management tools.
- Benchmarking against historical performance data.
- Investigating barriers to customer loyalty and repeat business.
- Mapping the customer journey to uncover critical touchpoints.

D3 Setting objectives

- SMART objectives for improving customer management.
- Increase first-contact resolution rates by 15% within the next six months.
- Achieve a customer satisfaction (CSAT) score of 90% or higher by year-end.
- Reduce average response time to customer enquiries to under two hours by Q3.
- Grow repeat customer rate by 20% over the next 12 months.
- Implement quarterly staff training with a target participation rate of 100%.
- Decrease customer complaints by 25% within the next year through proactive solutions.
- Launch a customer loyalty programme and enrol at least 1,000 members in the first quarter.

D4 Implementation planning

- Action plans, timelines and resource allocation.
- Assigning roles and responsibilities within the team.
- Identifying potential risks and developing mitigation strategies.
- Setting milestones to track progress and maintain accountability.
- Organising regular check-ins to address challenges and adapt plans.
- Ensuring compliance with organisational policies and relevant regulations.

D5 Monitoring and evaluation

- KPIs for customer satisfaction and retention.
- Feedback loops for continuous improvement.
- Documenting lessons learned and best practices.
- Utilising benchmarking to measure performance against industry standards.
- Creating dashboards for real-time monitoring.
- Reporting findings to stakeholders and leadership.
- Adjusting strategies based on data-driven insights.

D6 Presentation

- Structuring a clear and persuasive strategy.
- Using visuals and data to support recommendations.
- Tailoring presentations to suit different audiences.
- Mastering verbal and non-verbal communication techniques.
- Engaging stakeholders through storytelling and examples.
- Managing time effectively during presentations.
- Anticipating and addressing questions confidently.
- Utilising digital tools for interactive delivery.
- Encouraging feedback and participation.
- Summarising key points and outlining next steps clearly.

Assessment criteria

Learning aim A: Understand the importance of managing customers effectively in business success

Pass	Merit	Distinction
<p>A.P1 Explain the benefits of effective customer management for the success of a selected business.</p> <p>A.P2 Explain the consequences of poor customer management for a selected business.</p>	<p>A.M1 Assess how effective customer management contributes to customer loyalty and business success for a selected business.</p>	<p>A.D1 Evaluate the effectiveness of customer management in achieving long-term business success for a selected business, using relevant examples.</p>

Learning aim B: Investigate methods and techniques used to manage customer relationships

Pass	Merit	Distinction
<p>B.P3 Describe methods used by businesses to manage customer relationships for a selected business.</p> <p>B.P4 Explain the different technologies in managing customer relationships for a selected business.</p>	<p>B.M2 Assess the effectiveness of different methods and technologies in maintaining strong customer relationships for a selected business.</p>	<p>B.D2 Evaluate the impact of technology and methods on managing customer relationships.</p>

Learning aim C: Examine how businesses monitor and improve customer satisfaction

Pass	Merit	Distinction
<p>C.P5 Explain how a selected business monitors customer satisfaction.</p> <p>C.P6 Describe methods used to gather and analyse customer feedback for a selected business.</p>	<p>C.M3 Analyse how customer satisfaction influences improvements in customer service for a selected business.</p>	<p>C.D3 Evaluate the effectiveness of a business's approach to monitoring and improving customer satisfaction</p>

Learning aim D: Develop and present strategies to improve customer management in a business context

Pass	Merit	Distinction
<p>D.P7 Produce an outline strategy to improve customer management for a chosen business. [IS – V&NC]</p>	<p>D.M4 Develop a detailed strategy to improve customer management for a selected business, analysing weaknesses and opportunities for improvement.</p>	<p>D.D4 Present a comprehensive and creative strategy to improve customer management for a chosen business that demonstrates feasibility and alignment with business objectives.</p>

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR	EL – MOL *	IS – WC	SP – CT *
MY – PS&R	EL – CL	IS – V&NC ✓	SP – PS
MY – COP	EL – SRS	IS – T	SP – C&I *
MY – PGS	EL – PRS	IS – C&SI	

Table key

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Learning aim: A (A.P1, P2, A.M1, A.D1)

Learning aim: B (B.P3, B.P4, B.M2, B.D2)

Learning aim: C (C.P5, C.P6, C.M3, C.D3)

Learning aim: D (D.P7, D.M4, D.D4)

Further information for teachers and assessors

Resource requirements

There are no special resources needed for this unit.

Essential information for assessment decisions

Learning aim A

For distinction standard, students must conduct a thorough evaluation of customer management strategies – such as feedback methods and targeted communication – and assess their impact on long-term business success. Students should support their evaluation with well-researched, real-world examples, examining the strengths and weaknesses of each strategy and drawing reasoned, evidence-based conclusions about their effectiveness.

For merit standard, students must provide a detailed analysis of how effective customer management influences key business outcomes, including customer loyalty, retention rates and overall profitability. This analysis should clearly link specific management practices – such as the implementation of customer relationship management (CRM) systems and personalisation techniques – to measurable improvements in business performance. Students should use case studies or practical examples to illustrate clear cause-and-effect relationships.

For pass standard, students must present clear and accurate explanations of the importance of managing customers effectively, identifying the direct and indirect effects on business performance. This should include describing how customer management can lead to benefits such as increased satisfaction, repeat business and positive word-of-mouth. They should also describe the potential negative impacts of poor customer management, such as lost sales or reputational damage. Responses should demonstrate understanding through the use of appropriate business terminology and straightforward examples.

Learning aim B

For distinction standard, students must conduct a comprehensive evaluation of the impact of technology and personalisation on customer satisfaction and retention. This should include a critical assessment of various digital tools – such as customer relationship management (CRM) platforms, automated marketing, AI and chatbots – and how these innovations transform the customer experience. Students should discuss the advantages, such as increased efficiency, and possible drawbacks, such as data privacy concerns. Comparative examples from different industries, for instance retail versus hospitality, should be used to highlight how personalised strategies affect customer loyalty and long-term engagement. The conclusion should include a judgement.

For merit standard, students are expected to analyse the effectiveness of methods like personalised communication, targeted offers and loyalty programmes in building enduring customer relationships.

For pass standard, students must describe a variety of customer management techniques and methods, including communication strategies, the role of technology and the use of CRM systems, showing clear understanding of their objectives and application. Explanations should detail how tools like feedback surveys, regular email updates and dedicated customer service teams contribute to greater satisfaction and retention. Simple, straightforward examples – such as a small business using social media to respond to queries or a shopkeeper maintaining a loyalty card scheme – should illustrate the core principles and expected outcomes of effective customer management.

Learning aim C

For distinction standard, students must provide an in-depth evaluation of a business's approach to monitoring and improving customer satisfaction. This must include a review of monitoring and improving tools – such as Net Promoter Scores, customer satisfaction indexes, and real-time feedback platforms – assessing how these tools inform strategic decisions. Furthermore, evaluations should consider how ongoing monitoring enables businesses to adapt to changing customer expectations and maintain a competitive edge.

For merit standard, students must analyse how effective feedback and complaint handling processes contribute to tangible service improvements. Students should cite examples where businesses have used customer insights to drive innovation, improve response times, or refine communication channels. They should highlight the correlation between action taken and positive business outcomes such as enhanced reputation, repeat custom or increased loyalty.

For pass standard, students must clearly explain the methods businesses use to regularly monitor customer satisfaction and address complaints, focusing on the practical application of key techniques. Explanations should cover the use of feedback surveys (both digital and in-person), routine follow-up communications, review monitoring, and proactive customer service approaches such as dedicated helpdesks or complaint hotlines.

Learning aim D

For distinction standard, students must present a comprehensive and persuasive strategy that is fully justified through in-depth research and critical analysis. This includes demonstrating an understanding of current industry trends and best practices in customer management, integrating insights from academic and professional sources and providing recommendations with the organisation's wider objectives in mind. The strategy should incorporate innovative approaches – such as the use of emerging technologies or unique personalisation techniques – to address specific customer needs. Students should provide clear evidence to support their chosen methods and explain how these will deliver measurable improvements in creativity, feasibility and business objectives. The presentation of the strategy should be professional and structured; and supported by relevant data, case studies or benchmarking results.

For merit standard, students must develop a detailed strategy that outlines specific actions, supported by SMART (Specific, Measurable, Achievable, Relevant, Time-bound) objectives and realistic timelines. The strategy should directly address any identified weaknesses or opportunities within the business's current customer management approach, providing clear rationale for each recommended step. Students should include practical measures, such as improved communication processes, targeted loyalty initiatives, or enhanced complaint handling, and demonstrate how these actions will positively impact customer relationships. The proposed strategy should also consider potential challenges or constraints and provide contingency plans for overcoming challenges.

For pass standard, students must produce an outline strategy that identifies the key actions necessary to improve customer management, showing basic feasibility and understanding of core concepts. The outline should specify essential steps, such as introducing new feedback mechanisms, enhancing staff training, or updating customer service protocols. The outline should briefly explain how these actions could lead to better customer experiences and increased retention. The strategy should include simple justifications for each recommendation, demonstrating awareness of practical considerations such as resource limitations or customer preferences. Examples might include starting a regular email newsletter to keep customers informed, implementing a basic loyalty card scheme, or providing dedicated support channels for complaints and queries.

Links to other units

The assessment for this unit will draw upon some of the underpinning knowledge, understanding and skills covered in:

- Unit 1: Marketing Principles
- Unit 4: Branding Products and Services
- Unit 6: Investigating Customer Communications
- Unit 7: Investigating Digital Marketing
- Unit 10: Developing a Digital Marketing Campaign
- Unit 15: Customer Immersive Experience
- Unit 16: Activating a Brand
- Unit 17: Creatives Marketing
- Unit 18: Market Research.

Unit 22: Work Experience in Marketing

Level: 3

Unit type: Internal

Guided learning hours: 60

Unit in brief

The purpose of this unit is to provide students with practical opportunities to apply marketing knowledge and skills in a real workplace. Students will gain valuable marketing experience, develop professional behaviours and reflect on their performance to enhance future career prospects in marketing.

Unit introduction

Work experience in marketing offers you valuable first-hand practical experience and the chance to look at and find out about a variety of jobs, including some you may never have considered. Engaging with employers and organisations allows insight into the systems, protocols and methods used by employers and organisations in the marketing industry. This will give you significant value; it will enrich your CV, improve and expand your work-based professional skills, and enable you to make informed decisions about your career in marketing.

In this unit, you will engage in the complete process that undertaking work experience involves. You will explore marketing work-experience opportunities and develop application skills and techniques for obtaining work experience. You will apply professional skills and behaviours in the workplace to meet objectives set by an employer, while reflecting on your progress, efficiency, productivity and development.

Work experience is highly valued by employers for a variety of careers in the marketing industry. This unit will support you in progressing to employment in a junior position and to studying marketing-related qualifications in higher education and apprenticeships.

Learning aims

In this unit you will:

- A** Prepare for work experience to support progression into a career in marketing
- B** Carry out work experience in a marketing-related role to meet set objectives
- C** Reflect on work experience in a marketing-related role to inform own career progression.

Summary of unit

Learning aim	Key content areas	Assessment approach
A Prepare for work experience to support progression into a career in marketing	A1 Work experience opportunities A2 Marketing work experience preparation in relation to personal goals	A portfolio, including details of research on a marketing work experience role and development of preparation materials.
B Carry out work experience in a marketing-related role to meet set objectives	B1 Requirements in employment and employer needs B2 Marketing skills for work experience duties	A logbook and portfolio. It will cover tasks carried out and refer to health and safety.
C Reflect on work experience in a marketing-related role to inform own career progression	C1 Reflective practice C2 Further development opportunities in relation to career goals	Reflection for a personal/professional development portfolio (PDP).

Content

The essential content is set out under content areas. Students must cover all specified content before the assessment.

Learning aim A: Prepare for work experience to support progression into a career in marketing [MY - PGS]

A1 Work experience opportunities

- Work experience opportunities, such as work placement, voluntary work, part-time work, internship.
- Types of role, such as:
 - non-sector-specific roles:
 - market research assistant
 - marketing planner assistant
 - media buying executive
 - job roles in digital marketing:
 - digital copywriter assistant
 - search engine optimisation (SEO) assistant
 - social media executive
 - web content assistant
 - job roles in advertising:
 - account executive
 - account planning assistant
 - art executive
 - copywriter assistant
 - creative assistant
 - job roles in public relations:
 - public affairs executive
 - public relations account executive
 - public relations assistant.

- Company or organisation background research:
 - sources:
 - social media, web pages and marketing communications
 - professional body
 - network events
 - employees
 - information:
 - type of product/service
 - size and structure of company/organisation
 - previous marketing material
 - pricing strategies
 - target audiences
 - market position
 - hours available
 - experience and skills required
 - duties and responsibilities
 - legal.

A2 Marketing work experience preparation in relation to personal goals

- Self-evaluation:
 - career goals, aspirations and interests
 - skills and attributes
 - knowledge and experience
 - self-audit and analysis, e.g. SWOT analysis.
- Preparation for work experience, for example:
 - personal aims and objectives
 - short- (six months), medium- (six months to three years) and long-term goals (three years to five years)
 - actions and targets to gain work experience
 - timeline.
- Materials for work experience:
 - mapping skills and attributes to job descriptions and person specifications
 - research materials on the job role and organisation
 - communicating with company/organisation
 - negotiating work experience

- application, for example:
 - personal statement
 - CV
 - cover letter
 - application form
- a portfolio of work (e.g. for a digital marketing post)
- interview:
 - rehearsal
 - preparing for questions
 - setting own questions
 - portfolio or presentation materials
 - dress code
 - verbal and non-verbal communication.

Learning aim B: Carry out work experience in a marketing-related role to meet set objectives [MY – TPR]

Work experience typically involves 40 hours of work-related learning in an appropriate and safe manner. This can be done over a long period or in blocks during each term/semester.

B1 Requirements in employment and employer needs

- How role contributes to organisation.
- Personal contribution, duties and responsibilities, e.g. negotiated and agreed.
- Organisational structure and role within the structure.
- Employer objectives.
- Marketing skills.
- Professional skills.
- Changing circumstances.
- Organisational protocols and standards.
- Health and safety.
- Mental health and well-being.
- Legal and ethical requirements:
 - copyright
 - liability
 - Data Protection Regulations
 - representation
 - equality.

B2 Marketing skills for work experience duties

- Professional marketing skills, such as:
 - market research
 - internal stakeholder management
 - social media production
 - data analysis
 - database management
 - search engine optimisation (SEO)
 - content management systems (CMS)
 - content production
 - USER experience (UX) and user interface (UI)
 - design
 - copywriting.
- Personal employment skills, such as:
 - punctuality and time management
 - following instructions
 - applying standards and protocols
 - communication
 - organisation
 - teamwork and collaboration
 - use of technology and IT skills
 - prioritising, setting targets and reviewing progress
 - analysis and problem solving
 - reporting on progress
 - adapting to changing circumstances
 - health and safety
 - ethical responsibilities.

Learning aim C: Reflect on work experience in a marketing-related role to inform own career progression [MY - COP]

C1 Reflective practice

- Reflection on experience:
 - formats for ongoing records, e.g. blog, journal, diary, visual records, portfolio
 - ongoing reflection and summative reflection
 - formative feedback and sources:
 - appraisal
 - client
 - peer
 - tutor
 - employer, e.g. performance management
 - evaluating progress:
 - learning development
 - comparison with initial skills audit
 - meeting goals and targets
 - strengths and areas for development.

C2 Further development opportunities in relation to career goals

- Defining needs:
 - knowledge and skills gaps
 - defining career path
 - strategies for development.
- Opportunities:
 - qualifications and professional body courses
 - experiences and employment
 - personal projects
 - networking
 - coaching and mentoring
 - research.

Assessment criteria

Learning aim A: Prepare for work experience to support progression into a career in marketing

Pass	Merit	Distinction
<p>A.P1 Explain the skills and behaviours required for different job roles and responsibilities in marketing in relation to work.</p> <p>A.P2 Develop basic materials for applying for work experience in marketing.</p>	<p>A.M1 Develop effective materials through detailed assessment of work experience roles, responsibilities, requirements.</p> <p>A.M2 Develop professional skills and behaviours for work experience in marketing.</p>	<p>A.D1 Develop comprehensive materials through strategically aligning marketing organisation requirements with professional skills and behaviours.</p>

Learning aim B: Carry out work experience in a marketing-related role to meet set objectives

Learning aim C: Reflect on work experience in a marketing-related role to inform own career progression

Pass	Merit	Distinction
<p>B.P3 Describe the marketing role undertaken within the organisation structure and negotiate set objectives to meet the needs of the employer.</p> <p>B.P4 Demonstrate appropriate marketing and professional skills to meet set employer objectives.</p>	<p>B.M3 Demonstrate effective marketing and professional skills to meet set employer objectives.</p>	<p>BC.D2 Perform role and responsibilities confidently, adapting to changing circumstances.</p> <p>BC.D3 Evaluate the marketing and professional skills used to complete work experience, drawing reasoned conclusions as to how it can support own future career.</p>
<p>C.P5 Review own strengths and areas for development in response to self-review and feedback from work experience in marketing. [EL – CL]</p>	<p>C.M4 Assess own performance during work experience in marketing, making recommendations for personal and professional development.</p>	

Transferable skills

Managing Yourself	Effective Learning	Interpersonal Skills	Solving Problems
MY – TPR *	EL – MOL	IS – WC	SP – CT
MY – PS&R	EL – CL ✓	IS – V&NC	SP – PS
MY – COP *	EL – SRS	IS – T	SP – C&I
MY – PGS *	EL – PRS	IS – C&SI	

Table key

- * Signposted to indicate opportunities for development as a part of wider teaching and learning
- ✓ Embedded in teaching, learning and assessment
- blank Not embedded or signposted in unit

Essential information for assignments

The recommended structure of assessment is shown in the unit summary, along with suitable forms of evidence. The *Pearson BTEC International Level 3 Qualifications Supplementary Information* document gives information on setting assignments. There is also further information on our website.

There is a maximum number of two summative assignments for this unit.

The relationship of the learning aims and criteria is:

Learning aim: A (A.P1, A.P2, A.M1, A.D1)

Learning aims: B and C (B.P3, B.P4, C.P5, B.M2, C.M3, B.D2, C.D3)

Further information for teachers and assessors

Resource requirements

A work placement of 40 hours in a marketing environment is required.

Essential information for assessment decisions

Learning aim A

For distinction standard, students will carry out in-depth research and select relevant evidence to show how they chose an appropriate marketing work experience opportunity. They will fully map their behaviours, skills and attributes to the job description, person specification and organisation requirements. They will demonstrate professional communication skills when dealing with the work experience organisation, and produce a detailed and professional CV, cover letter, application form and personal statement (if necessary for the role).

For merit standard, students will select and apply relevant knowledge of work experience in the marketing industry. Students will demonstrate a clear assessment of the benefits of work experience and how it can support them in gaining a realistic understanding of opportunities in the marketing industry. They will demonstrate a clear and thorough understanding of the requirements of the placement and will demonstrate how their skills and behaviours align to most elements of the job description and person specification. They will demonstrate mostly professional communication skills when dealing with the work experience organisation, and will produce a professional CV, cover letter, application form and personal statement (if necessary for the role), though some elements may be more detailed than others.

For pass standard, students will carry out research that allows them to give reasons why the appropriate skills and behaviours are necessary for work experience. Students will need to consider at least two job roles. They will demonstrate some understanding of the requirements of the placement. They will show some professional communication skills when dealing with the work experience organisation and will produce a basic CV, cover letter, application form and personal statement (if necessary for the role), that may include some communication errors.

Learning aims B and C

For distinction standard, students will undertake their work experience role with confidence and professionalism at all times. During the working day, they will be able to adapt to the changing needs of their employer. They will apply organisation standards at all times and be fully aware of when and how to escalate issues to their superiors. All communication during the placement will be in line with the work experience organisation's standards and may exceed them. Students will reflect in depth on their work experience and its benefits for their career. They will come to a reasoned conclusion, supported by relevant evidence and feedback from others, about their strengths and weaknesses and will reflect on opportunities for improvement to help them in their future career.

For merit standard, students will undertake their work experience role effectively, remaining professional. They will be able to carry out most tasks asked of them to a good standard. All communication during the placement will be in line with the organisation's standards and their work must contribute to the employer's objectives. Students will demonstrate their assessment the workplace skills they have been shown and, by listening to feedback from others, the skills they will need in the workplace in the future. Students will be able to successfully support their assessment with examples from their work experience and offer recommendations on how they could improve in their role.

For pass standard, students will undertake their work experience role appropriately, remaining mostly professional. They will be able to carry out the tasks asked of them with some support. They will be able to give a clear and objective account, recalling their work experience and the skills they demonstrated that met the needs of their employer, as well as describing the organisation structure and objectives. Students will demonstrate an understanding of the skills needed in the workplace, both personal and professional. They will use feedback to put together targets for improvement, highlighting their strengths and areas for development in their professional and personal skills.

Links to other units

This unit links with all other units in the specification.

5 Planning your programme

Is there a student entry requirement?

As a centre it is your responsibility to ensure that students who are recruited have a reasonable expectation of success on the programme. There are no formal entry requirements but we expect students to have qualifications at or equivalent to Level 2.

Students are most likely to succeed if they have:

- five international GCSEs at good grades, and/or
- BTEC qualification(s) at Level 2
- Other appropriate qualifications or achievement at year 11 or age 16 in core subjects. Students may demonstrate ability to succeed in various ways. For example, students may have relevant work experience or specific aptitude shown through diagnostic tests or non-educational experience.

If students are studying in English we recommend that they have attained at least Level B2 in the Common European Framework of Reference for Languages or Pearson Global Scale of English 51. Please see resources available from Pearson at www.pearson.com/english.

Supporting you in planning and implementing your programme

There will be lots of free teaching and learning support to help you deliver the new qualifications:

- Our Teaching and Learning Guide will help you to plan how to deliver the content and assessments that make up BTEC International Level 3 in Marketing qualification. It also highlights opportunities to develop the transferable skills identified within the units in this specification.
- Sample schemes of work are provided for each mandatory unit as well as a selection of optional units. These are available in Word™ format for ease of customisation.
- For units assessed with a Pearson Set Assignment Brief, we have provided a sample assignment as an example of the form of assessment for the unit. For the remaining units, we will allow you to set your own assignments, according to your students' preferences and to link with your local employment profile. We also provide Authorised Assignment Briefs, which are approved by Pearson Standards Verifiers.
- Our mapping document highlights key differences between the new qualification and BTEC International Level 3 Qualifications in Marketing (2020), which this qualification replaces.

Using Pearson Progress to support the planning, delivery and management of internal assessments

Pearson Progress is a digital support system that helps you to manage the assessment and quality assurance of these qualifications. This application supports the delivery, assessment and quality assurance of International BTECs in centres and supports teachers, assessors and students as follows:

- course creation
- creating and verifying assignments
- creating assessment plans and recording assessment decisions
- upload of assignment evidence
- tracking progress of every student.

The system is accessible to teachers and students so that they both can track their progress.

Training and support from Pearson

There are many people available to support you and give you advice and guidance on the delivery of these qualifications. They include the following:

- Subject Advisors – they understand all Pearson qualifications in their sector and can answer sector-specific queries on planning, teaching, learning and assessment.
- Standards Verifiers – they can support you with preparing your assignments, ensuring that your assessment plan is set up correctly, and support you in preparing student work and providing quality assurance through sampling.
- Regional teams – they are regionally based and have a full overview of the BTEC qualifications and of the support and resources that Pearson provides. Regions often run network events.
- Customer Services – the ‘Support for You’ section of our website gives the different ways in which you can contact us for general queries. For specific queries, our service operators can direct you to the relevant person or department.

Pearson provides a range of training and professional development events to support the introduction, delivery, assessment and administration of BTEC International Level 3 qualifications. These sector-specific events, developed and delivered by specialists, are available both face to face and online.

We also offer ‘Getting Ready to Teach’ events which are designed to get teachers ready for delivery of the BTEC International Level 3 qualifications. They include an overview of qualification structures, planning and preparation for internal assessment, and quality assurance.

Beyond the 'Getting Ready to Teach' professional development events, there are opportunities for teachers to attend sector- and role- specific events. These events are designed to connect practice to theory; they provide teacher support and networking opportunities with delivery, learning and assessment methodology.

Details of our training and professional development programme can be found on our website.

6 Understanding the qualification grade

Awarding and reporting for the qualification

This section explains the rules that we apply in awarding a qualification and in providing an overall qualification grade for each student. It shows how all the qualifications in this sector are graded.

Eligibility for an award

In order to be awarded a qualification, a student must complete all units AND achieve a Pass or above in all mandatory units unless otherwise specified. Refer to the structure in *Section 3 Structure*.

- complete and **have an outcome** (D, M, P or U) for all units within a valid combination
- achieve the **mandatory units at Pass or above** shown in *Section 3 Structure*
- achieve the **minimum number of points** at a grade threshold.

It is the responsibility of a centre to ensure that a correct unit combination is adhered to. Students who do not achieve the required minimum grade (P) in units shown in the structure will not achieve a qualification.

Students who do not achieve sufficient points for a qualification or who do not achieve all the required units may be eligible to achieve a smaller qualification in the same suite, provided they have completed and achieved the correct combination of units and met the appropriate qualification grade points threshold.

Awarding the qualification grade

The final grade awarded for a qualification represents an aggregation of a student's performance across the qualification. As the qualification grade is an aggregate of the total performance, there is some element of compensation in that a higher performance in some units may be balanced by a lower outcome in others.

BTEC International Level 3 qualifications are awarded at the grade ranges shown in the table below.

Qualification	Available grade range
Certificate, Extended Certificate, Foundation Diploma	P to D*
Diploma	PP to D*D*
Extended Diploma	PPP to D*D*D*

The *Calculation of the qualification grade* table, shown later in this section, shows the minimum thresholds for calculating these grades. The table will be kept under review over the lifetime of the qualification. The most up-to-date table will be issued on our website.

Pearson will monitor the qualification standard and reserves the right to make appropriate adjustments.

Students who do not meet the minimum requirements for a qualification grade to be awarded will be recorded as Unclassified (U) and will not be certificated. They may receive a Notification of Performance for individual units. The *Information Manual* gives full information.

Points available for units

The table below shows the number of **points** available for units. For each unit, points are allocated depending on the grade awarded.

Grade	Unit size (60 GLH)
U	0
Pass	6
Merit	10
Distinction	16

Claiming the qualification grade

Subject to eligibility, Pearson will automatically calculate the qualification grade for your students when the unit grades are submitted and the qualification claim is made. Students will be awarded qualification grades for achieving the sufficient number of points (with valid combinations) within the ranges shown in the relevant *Calculation of the qualification grade* table for the cohort.

Awarding the qualification grade

Applicable for registration from 1 September 2027.

Certificate		Extended Certificate		Foundation Diploma		Diploma		Extended Diploma	
180 GLH		360 GLH		540 GLH		720 GLH		1080 GLH	
Grade	Points threshold	Grade	Points threshold	Grade	Points threshold	Grade	Points threshold	Grade	Points threshold
Unclassified	0	U	0	U	0	U	0	U	0
Pass	18	P	36	P	54	PP	72	PPP	108
						MP	88	MPP	124
								MMP	140
Merit	26	M	52	M	78	MM	104	MMM	156
						DM	124	DMM	176
								DDM	196
Distinction	42	D	74	D	108	DD	144	DDD	216
						D*D	162	D*DD	234
								D*D*D	252
Distinction*	48	D*	90	D*	138	D*D*	180	D*D*D*	270

This table is subject to review over the lifetime of the qualification. The most up-to-date version will be issued via our website.

Example grading tables

In this section, you will find examples of how students can meet a range of qualification grade thresholds based on the unit points accumulated, to determine an overall qualification grade.

Pearson BTEC International Level 3 Certificate in Marketing (180 GLH)

Achievement of a Certificate with a Merit grade

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Pass	6
12	60	Int	Merit	10
13	60	Int	Distinction	16
TOTAL	180		Merit	32

In this example, the student has sufficient points for a Merit grade. The student has met the minimum requirement for Pass or higher in the mandatory unit.

Pearson BTEC International Level 3 Extended Certificate in Marketing (360 GLH)

Achievement of an Extended Certificate with a Pass grade

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Distinction	16
2	60	PSA	Merit	10
9	60	Int	Pass	6
12	60	Int	Pass	6
13	60	Int	Pass	6
14	60	Int	Pass	6
TOTAL	360		Pass	50

In this example, the student has sufficient points for a Pass grade. The student has met the minimum requirement for Pass or higher in the mandatory units.

Pearson BTEC International Level 3 Foundation Diploma in Marketing (540 GLH)

Achievement of a Foundation Diploma with a Distinction grade

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Distinction	16
2	60	PSA	Merit	10
3	60	PSA	Distinction	16
9	60	Int	Distinction	16
10	60	Int	Pass	6
12	60	Int	Merit	10
13	60	Int	Merit	10
14	60	Int	Distinction	16
15	60	Int	Distinction	16
TOTAL	540		Distinction	116

In this example, the student has sufficient points for a Distinction grade. The student has met the minimum requirement for Pass or higher in the mandatory units.

Pearson BTEC International Level 3 Diploma in Marketing (720 GLH)

Achievement of a Diploma with a PP grade

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Merit	10
2	60	PSA	Merit	10
3	60	PSA	Distinction	16
4	60	PSA	Pass	6
5	60	PSA	Distinction	16
9	60	Int	Pass	6
10	60	Int	Merit	10
12	60	Int	Unclassified	0
13	60	Int	Unclassified	0
14	60	Int	Merit	10
15	60	Int	Distinction	16
16	60	Int	Merit	10
TOTAL	720		PP	110

In this example, the student has sufficient points for a PP grade despite receiving an Unclassified result for Units 12 and 13. The student has met the minimum requirement for Pass or higher in the mandatory units.

Pearson BTEC International Level 3 Diploma in Marketing (720 GLH)

Achievement of a Diploma with a MM grade

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Merit	10
2	60	PSA	Merit	10
3	60	PSA	Distinction	16
4	60	PSA	Pass	6
5	60	PSA	Distinction	16
9	60	Int	Pass	6
10	60	Int	Merit	10
12	60	Int	Pass	6
13	60	Int	Pass	6
14	60	Int	Merit	10
15	60	Int	Distinction	16
16	60	Int	Merit	10
TOTAL	720		MM	122

In this example, the student has sufficient points for an MM grade. The student has met the minimum requirement for Pass or higher in the mandatory units.

Pearson BTEC International Level 3 Diploma in Marketing (720 GLH)

An Unclassified result for a Diploma

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Unclassified	0
2	60	PSA	Merit	10
3	60	PSA	Distinction	16
4	60	PSA	Pass	6
5	60	PSA	Distinction	16
9	60	Int	Pass	6
10	60	Int	Merit	10
12	60	Int	Pass	6
13	60	Int	Pass	6
14	60	Int	Merit	10
15	60	Int	Distinction	16
16	60	Int	Merit	10
TOTAL	720		Unclassified	112

In this example, the student has sufficient points for an MM grade but has not met the minimum requirement for Pass or higher in one of the mandatory units. An Unclassified result for Unit 1.

Pearson BTEC International Level 3 Extended Diploma in Marketing (1080 GLH)

Achievement of a Diploma with a MMM grade

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Pass	6
2	60	PSA	Merit	10
3	60	PSA	Pass	6
4	60	PSA	Pass	6
5	60	PSA	Distinction	16
6	60	PSA	Pass	6
7	60	PSA	Pass	6
8	60	PSA	Merit	10
9	60	Int	Pass	6
10	60	Int	Distinction	16
11	60	Int	Merit	10
12	60	Int	Pass	6
13	60	Int	Unclassified	0
14	60	Int	Merit	10
15	60	Int	Pass	6
17	60	Int	Merit	10
19	60	Int	Distinction	16
22	60	Int	Merit	10
TOTAL	1080		MMM	156

In this example, the student has sufficient points for an MMM grade despite receiving Unclassified result for Unit 13. The student has met the minimum requirement for Pass or higher in the mandatory units.

Pearson BTEC International Level 3 Extended Diploma in Marketing (1080 GLH)

Achievement of a Diploma with a DDD grade

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Distinction	16
2	60	PSA	Merit	10
3	60	PSA	Merit	10
4	60	PSA	Pass	6
5	60	PSA	Distinction	16
6	60	PSA	Pass	6
7	60	PSA	Distinction	16
8	60	PSA	Distinction	16
9	60	Int	Merit	10
10	60	Int	Distinction	16
11	60	Int	Merit	10
12	60	Int	Distinction	16
13	60	Int	Merit	10
14	60	Int	Merit	10
15	60	Int	Distinction	16
17	60	Int	Merit	10
19	60	Int	Distinction	16
22	60	Int	Merit	10
TOTAL	1080		DDD	220

In this example, the student has sufficient points for an DDD grade. The student has met the minimum requirement for Pass or higher in the mandatory units.

Pearson BTEC International Level 3 Extended Diploma in Marketing (1080 GLH)

An Unclassified result for an Extended Diploma

Unit number	GLH	Type (Int/PSA)	Grade	Unit points
1	60	PSA	Unclassified	0
2	60	PSA	Merit	10
3	60	PSA	Pass	6
4	60	PSA	Pass	6
5	60	PSA	Pass	6
6	60	PSA	Pass	6
7	60	PSA	Merit	10
8	60	PSA	Merit	10
9	60	Int	Merit	10
10	60	Int	Pass	6
11	60	Int	Merit	10
12	60	Int	Unclassified	0
13	60	Int	Pass	6
14	60	Int	Merit	10
15	60	Int	Unclassified	0
17	60	Int	Merit	10
19	60	Int	Pass	6
22	60	Int	Merit	10
TOTAL	1080		Unclassified	122

In this example, the student has sufficient points for an PPP grade but has not met the minimum requirement for Pass or higher in one of the mandatory units. An Unclassified result for Unit 1.

Appendix 1 Glossary of terms used for internally assessed units

Term	Definition
Adequate	Student work is satisfactory or acceptable in quality and quantity.
Analyse	Students break the issue/situation down into the key elements and show their understanding of the issues/situation applied to the scenario/context. Responses would be significantly beyond generic.
Apply/use/employ	Students implement a method, technique, process or approach in an activity.
Assess	Students give careful consideration to all the factors or events that apply, identify which are the most important or relevant, and make a judgement on the importance of the factors.
Carry out	Students demonstrate skills through practical activities, in line with certain requirements.
Clear/ly	The qualities required are well demonstrated, unambiguous and beyond a basic level.
Coherent	Student intentions are clear, logically structured and can be interpreted by others.
Compare	Students show knowledge and understanding by identifying the main factors relating to two or more items/situations or aspects of a subject that is extended with the required explanations, e.g. similarities/differences, advantages/disadvantages, impacts.
Comprehensive	Used to describe either scope or depth, for example: Student work is well developed and thorough, covering all aspects/information in terms of both depth and breadth. OR Students demonstrate in-depth and accurate understanding of the aspects being assessed.
Confident	Student work demonstrates well-developed and secure application of skills or processes that are significantly beyond a basic level.

Term	Definition
Consistent	Students demonstrate reliable and constant practice that maintains a set standard.
Create/produce	Students generate an idea/outcome to specific criteria.
Demonstrate	Students carry out and apply knowledge, understanding and/or skills in a practical situation.
Describe	Students provide an account of something or highlight a number of key features of a given topic or process, that shows a level of understanding.
Detailed	Students cover most if not all of the expected requirements and demonstrate a high level of understanding.
Develop	Students apply a process of improving/progressing skills, concepts or work in order to produce outcomes.
Discuss	An issue, situation or process will be presented and the student will need to break the issue/situation/process down into the key elements, show their understanding of the issues/situation/process applied to the scenario/context (so generic answers are not acceptable), and show interrelationship in their answers.
Effective	Students demonstrate skills or provide outcomes that are well developed with a range of proficient qualities and that achieve objectives
Evaluate	Students consider various aspects of a subject's qualities in relation to its context such as: strengths or weaknesses, advantages or disadvantages, pros or cons. They will come to a judgement supported by evidence, which will often be in the form of a conclusion.
Examine	Students demonstrate an ability to thoroughly inspect something in order to determine its qualities beyond a basic exploration.
Explain	Students can give an insight into the topic showing some level of understanding by providing reasons or examples.
Explore	Students undertake practical research or investigation to develop their skills or understanding of the topic/activity.
Implement	Students take actions or measures to put something into effect.

Term	Definition
Investigate	Students perform a systematic inquiry into a topic using research skills, usually to demonstrate their understanding of a topic.
Justify	Students give relevant and logical reasons or evidence to support their actions or opinions.
Partial/some	To an extent, but not completely. Students do not include all of the requirements.
Perform	Students demonstrate a range of skills required to complete a given activity.
Prepare	Students organise a task/equipment/individuals/activities in advance of carrying it out.
Realistic/feasible	Students demonstrate insight into the logistics and manageability of proposals/plans/objectives/ideas and show consideration of the potential to achieve the outcomes.
Refine/optimise	Students make considered improvements to outcomes.
Review	Students consider evidence in order to make judgements about the qualities.
Understand	Students demonstrate insight or ability to interpret a subject.
Undertake	Students demonstrate skills through practical activities, often referring to given processes or techniques.

Appendix 2 Transferable Skills framework

Code = transferable skill initials–skill cluster initials

Managing yourself

Code	Skill cluster	Performance Descriptor
MY-TPR	Taking personal responsibility	<ul style="list-style-type: none"> • Demonstrates understanding of their role and responsibilities and the expected standards of behaviour. • Demonstrates compliance with codes of conduct and ways of working. • Makes use of available resources to complete tasks. • Manages their time to meet deadlines and the required standards. • Demonstrates accountability for their decisions or actions.
MY-PS&R	Personal strengths and resilience	<ul style="list-style-type: none"> • Identifies own personal strengths and demonstrates the ability to use these in relevant areas. • Demonstrates the ability to adapt own mindset and actions to changing situations or factors. • Uses challenges as learning opportunities.

Code	Skill cluster	Performance Descriptor
MY-COP	Career orientation planning	<ul style="list-style-type: none"> • Undertakes research to understand the types of roles in the sector in which they could work. • Reviews own career plans against personal strengths and identifies areas for development to support progression into selected careers. • Takes part in sector-related experiences to support career planning.
MY-PGS	Personal goal setting	<ul style="list-style-type: none"> • Sets SMART goals using relevant evidence and information. • Reviews progress against goals and identifies realistic areas for improvement. • Seeks feedback from others to improve own performance.

Effective learning

Code	Skill cluster	Performance Descriptor
EL-MOL	Managing own learning	<ul style="list-style-type: none"> • Maintains a focus on own learning objectives when completing a task. • Demonstrates the ability to work independently to complete tasks. • Reviews and applies learning from successful and unsuccessful outcomes to be effective in subsequent tasks.
EL-CL	Continuous learning	<ul style="list-style-type: none"> • Engages with others to obtain feedback about own learning progress. • Responds positively to feedback on learning progress from others. • Monitors own learning and performance over the short and medium term.
EL-SRS	Secondary research skills	<ul style="list-style-type: none"> • Define the research topic or question. • Uses valid and reliable sources to collate secondary data. • Interprets secondary data and draws valid conclusions. • Produces a reference list and cites sources appropriately.
EL-PRS	Primary research skills	<ul style="list-style-type: none"> • Define the research topic or question. • Carries out primary data collection using appropriate and ethical research methodology. • Interprets primary data to draw valid conclusions.

Interpersonal skills

Code	Skill cluster	Performance Descriptor
IS-WC	Written communication	<ul style="list-style-type: none"> • Produces clear formal written communication using appropriate language and tone to suit purpose.
IS-V&NC	Verbal and non-verbal communications	<ul style="list-style-type: none"> • Uses verbal communication skills effectively to suit audience and purpose. • Uses body language and non-verbal cues effectively. • Uses active listening skills and checks understanding when interacting with others.
IS-T	Teamwork	<ul style="list-style-type: none"> • Engages positively with team members to understand shared goals and own roles and responsibilities. • Respectfully considers the views of team members and consistently shows courtesy and fairness. • Completes activities in line with agreed role and responsibilities. • Provide support to team members to achieve shared goals.
IS-C&SI	Cultural and social intelligence	<ul style="list-style-type: none"> • Demonstrates awareness of own cultural and social biases. • Demonstrates diversity, tolerance and inclusivity values in their approach to working with others.

Solving problems

Code	Skill cluster	Performance Descriptor
SP-CT	Critical thinking	<ul style="list-style-type: none"> • Demonstrates understanding of the problem or issue to be addressed. • Makes use of relevant information to build ideas and arguments. • Assesses the importance, relevance and/or credibility of information. • Analyses, interprets and evaluates information to present reasoned conclusions.
SP-PS	Problem solving	<ul style="list-style-type: none"> • Presents a clear definition of the problem. • Gathers relevant information to formulate proposed solutions. • Selects relevant and significant information to formulate proposed solutions. • Identifies negative and positive implications of proposed solutions. • Presents and justifies selected solutions to problems.
SP-C&I	Creativity and innovation	<ul style="list-style-type: none"> • Identifies new and relevant ideas to help solve a problem. • Refines ideas into workable solutions based on test results and/or feedback.

Appendix 3 Digital Skills framework

Problem solving

Using digital tools to analyse and solve problems:

Performance descriptor	Unit mapping
Use digital tools and techniques for research, collaboration and resolution of problems.	Units 4, 5, 6, 7, 12, 13, 14, 15, 16, 17, 18
Have up-to-date knowledge of ways that technology is used within a sector.	Units 4, 5, 6, 7, 12, 13, 14, 15, 16, 17, 18
Present ideas and findings using digital tools.	Units 4, 5, 6, 7, 12, 13, 14, 15, 16, 17, 18
Use digital tools to manipulate data.	Units 4, 5, 6, 7, 12, 13, 14, 15, 16, 17

Digital collaboration and communication

Using digital tools to communicate and share information with stakeholders:

Performance descriptor	Unit mapping
Understand and use digital collaboration and communication platforms.	Units 4, 5, 6, 7, 12, 13, 14, 15, 16, 17
Use collaboration tools to meet with, share and collaborate with customers and colleagues.	Units 4, 5, 6, 7, 12, 13, 14, 15, 16, 17

Transacting digitally

Using digital tools to set up accounts and pay for goods/services:

Performance descriptor	Unit mapping
Use online systems to access and update digital records.	Units 1, 2, 3, 4, 5, 6, 19, 22
Set-up accounts to complete transactions.	Units 1, 2, 3, 4, 5, 6, 19, 22

Digital security

Identify threats and keep digital tools safe:

Performance descriptor	Unit mapping
Understand the types of malware.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19
Understand the threats involved in carrying out online activities.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19
Protect personal and organisation information and data.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19
Keeping systems secure.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19

Handling data safely and securely

Follow correct procedures when handling personal and organisational data:

Performance descriptor	Unit mapping
Manage passwords and keep them secure.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19
Identify websites and services that are secure and insecure.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19
Understand the digital policy for a sector.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19
Understand the impact of online data.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19
Understand copyright and intellectual property.	Units 4, 5, 6, 12, 13, 14, 16, 17, 19

Appendix 4 Sustainability framework

Sustainable development goal	Unit mapping
SDG 1: No poverty	Unit 3
SDG 2: Zero hunger	
SDG 3: Good health and wellbeing	Units 6, 8, 22
SDG 4: Quality education	Units 5, 6, 8, 9, 10, 11, 12, 13, 14
SDG 5: Gender equality	Units 12, 14, 17
SDG 6: Clean water and sanitation	Unit 5
SDG 7: Affordable and clean energy	Unit 20
SDG 8: Decent work and economic growth	Units 1, 5, 6, 7, 8, 9, 10, 11, 12, 14
SDG 9: Industry, innovation and infrastructure	Units 5, 7, 8, 9, 10, 11, 17, 20
SDG 10: Reduced inequalities	Unit 1, 13, 14
SDG 11: Sustainable cities and communities	Units 3, 8
SDG 12: Responsible consumption and production	Units 1, 2, 5, 6, 7, 8, 16, 17, 18, 19, 20
SDG 13: Climate action	Unit 5, 6, 7, 21
SDG 14: Life below water	
SDG 15: Life on land	
SDG 16: Peace, justice and strong institutions	Units 4, 5, 6
SDG 17: Partnerships for the goals	Units 5, 9, 10, 12, 13, 14

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VAT Reg No GB 278 537121

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Publication code:
VQ000538