Social Marketing: “Selling” Education to Your Clients

A Training Workbook
Developed by Elizabeth Gregory
Associate Professor and Extension Communications Specialist
Coordinator, Extension Marketing
Texas Cooperative Extension
Marketing is, at its most basic level, a relationship in which there is an exchange of value. To think more about this, let’s take as an example a business that is very successful at marketing: McDonald’s fast-food restaurants.

Marketing and McDonald’s

In this example, the relationship is between the business on the one side and its customers on the other. And the exchange is simple: McDonald’s gives its customers hamburgers, and the customers give McDonald’s dollars. The value, from the customers’ point of view, is food they like. From McDonald’s point of view, the value they receive is the money that keeps the business going.

A relationship exists because McDonald’s knows a lot about their customers, and the customers know a lot about McDonald’s. For example, McDonald’s knows that one of their customer groups, kids, likes toys—so McDonald’s puts toys in Happy Meals. They also know when kids watch television, so you’ll see a lot of Happy Meal commercials on Saturday mornings. The customers know which of McDonald’s hamburgers they like, and which they don’t like. When the value isn’t there, the customers don’t spend the dollars—remember the poor sales of the Arch Deluxe? And if McDonald’s suddenly dropped everything on the menu except the Arch Deluxe, they wouldn’t receive the value they depend on to stay in business. So each partner in the relationship affects and responds to the other.

A commercial marketing relationship is usually very direct: the people who receive the value from the business are the same people who provide the value the business needs to continue.

But how does this work for a non-profit educational organization like Cooperative Extension?

Marketing in Extension

In Extension, we have two primary marketing relationships. The people to whom we give our value, our educational programs, are not the same people who give us the value, in taxpayer dollars, that keeps us “in business.” The people to whom we provide our programs are, of course, our clients. And the people who provide us with a share of the public funds are legislators and other elected officials.

So for us, marketing has to do with access and accountability. We must provide access to our programs to our clients, by developing marketing materials and messages that tell them about the value we offer. And we must be accountable to the elected officials by developing materials that tell them how we spent the public funds, and how the people of our state are better off because of our programs.
Social Marketing

Campaigns for social change, or behavior change, are not new. As far back as 3,000 years ago, campaigns were being waged in Greece and Rome to free the slaves. What has developed in recent years, however, is a new approach to tackling the issue of behavior change: the social marketing approach. The term was first used in 1971, when Philip Kotler and Gerald Zaltman realized that the same marketing principles that were being used to sell products to consumers could also “sell” ideas, attitudes, and behaviors.

Like commercial marketing, the focus is on the consumer, on learning what people want and need rather than trying to persuade them to buy what we happen to be producing. Marketing talks to the consumer, not about the product. In social marketing, understanding the target audience is essential for developing effective messages and strategies. Of course, people are more than their age, race, and gender. Their attitudes, knowledge, and beliefs are critically important in understanding how to motivate them to change their behavior. Knowledge of your target audience leads to more appropriate message design, more effective delivery, and better reception by the audience.

In social marketing, the traditional “Four P’s” can be defined a little differently from those of commercial marketing.

**Product.** In social marketing, the product is not necessarily a physical “thing.” There are many different kinds of products, from tangible, physical products (like condoms), to services (like medical exams), practices (like eating a heart-healthy diet), and more intangible ideas (like protecting the environment). In order for the product to be viable, people must first perceive that they have a genuine problem, and that the product offers a good solution for that problem. When developing your marketing message, keep in mind the audience’s views of the problem and the product, and how important they think it is to correct the problem.

**Price.** Price means simply what the person must do in order to get the product. This cost may be monetary, or it instead may require the person to give up intangibles, such as time or effort, or to risk embarrassment or disapproval. If the costs outweigh the benefits for someone, it is unlikely that he or she will adopt the product. But, if the benefits are greater than the costs, chances of adoption are much greater.

**Place.** Place is the way the product reaches the consumer. For a tangible product, this is the distribution system including the warehouse, trucks, sales force, retail outlets where it is sold, or places where it is given out for free. For an intangible product, place is less clear-cut, but includes the channels through which people are reached with information or training. This may include doctors’ offices, shopping malls, mass media, targeted media, or in-home demonstrations.

**Promotion.** Promotion is the most visible part of a marketing effort, and some people think it is the only thing involved in marketing. But you can see it is just one piece of the “marketing mix.” For social marketing, promotion includes everything you do and all the things you create to get your message out. It can include newsletters, direct mail, posters, flyers, personal presentations, and others. The focus is on cre-
ating and sustaining demand for the product. PSAs or paid ads are also good possibilities, but other methods like media events, editorials, “Tupperware”-style parties, or in-store displays can work well, too.

Social marketing also has a few extra P’s that you should think about:

**Partnership:** social and health issues are often so complex that one group can’t make a dent by itself. You need to team up with other organizations in the community to really be effective. You need to figure out which organizations have similar goals to yours—not necessarily the same goals—and identify ways you can work together.

**Policy:** social marketing can do well in motivating someone to change his or her behavior, but that is hard to sustain unless the person’s environment supports that change for the long run. Often, policy change is needed, and media advocacy programs can help.

**Politics:** the issues addressed by some social marketing programs are often controversial or complex, such as safer sex or violence, and may need some diplomacy with community organizations to gain support, to get access to the target audience, or to head off potential adversaries.

**Publics:** for social marketing to succeed in creating behavior change, often many different people and organizations must be involved. It’s important to be aware of who these other players are, both inside and outside your organization.

**Pursestrings:** social marketing, especially when it involves mass media, can be expensive. At the same time, if the cause is a good one, there may be many funding organizations willing to help.

### Why Is Social Marketing Necessary?

Before people began to think in terms of social marketing, organizations used several other methods of encouraging people to change their behavior. These include health education, health promotion, mass communication, media advocacy, public communications, social advertising, and social mobilization. These approaches fall into four general categories.

**The Education Approach:** the education approach begins with the idea that people will do the right thing if they just understand why it is important and how to do it. The task here is to bring the facts to the target audience in a way that they can easily understand and in a way that will impress upon them the importance of the behavior change.

This approach works to change the beliefs of the target audience, and it can be very successful. However, it does not focus on behavior; it assumes that if you can change beliefs, behavior change will follow. It also ignores the effects of social pressure. We all do things from time to time because they are socially acceptable, even if we personally see no need to or are opposed to it.

**The Persuasion Approach:** this approach is based on the idea that a change in behavior takes place only if people are sufficiently motivated. This idea is the basis for social advertising efforts like the “Just Say No” anti-drug campaign. The problem is that the persuasion approach requires that the target audience must adopt the persuasionist’s view of the world—the idea
that the advertiser knows what is good for the audience, even if they don’t know it themselves. This approach is centered on the advertising organization, on their mission or agenda.

Social marketing, on the other hand, is audience-centered, and realizes that a successful effort must begin with the audience members’ reality.

The Behavioral Modification Approach: this approach focuses on the principles of learning theory that state that people do things because they learn the techniques necessary for doing them and they find the outcomes rewarding. The difficulty with this approach is that it is most successful when conducted one-on-one, while social marketing can be directed at targeted or mass audiences as well as individuals.

The Social Influence Approach: this approach is based on the idea that changing community norms is the best way to reach and change individuals and families. So these organizations see changing social norms about things like smoking or using condoms as the best way to convince people that they must act in a certain way in order to avoid social isolation.

However, this approach is most successful in situations in which the social issues are well understood and accepted, the pressures to conform are extremely strong, and the behavior to be changed is socially important and visible to others. But even in these situations, the more educated and independent individuals in the target audience are, the less likely it is that the social influence approach would work.

Social Marketing’s Advantage: social marketing is an approach which combines many of the benefits of these other approaches and avoids some of the pitfalls. The fundamental principle for successful social marketing is focusing on the audience, and it applies not only to promoting a program or event, but also to the presentation of the educational content. Designing all your communication with the client’s perspective in mind will help greatly in attracting audiences for your educational programs and in ensuring that you are a successful agent of change.


What Does Social Marketing Mean for Extension?

The typical social marketing campaign depends primarily on mass media, especially television, radio, and print advertising. For this reason, results are often difficult and expensive to evaluate and can take years to develop. In Extension, we have a responsibility to report impacts and results every year, or even every month.

For us, social marketing principles can be applied in several ways. First, take a social marketing approach to developing traditional educational opportunities. That will greatly enhance your audience’s response. Second, combine mass media work with education efforts with targeted groups. That way, you get the accountability information you need, while the mass media messages are encouraging change in the larger population.

What other applications can you imagine?
Targeting the Audience for Social Marketing

These worksheets will guide you in developing and executing a plan for marketing your program or activity as well as designing your educational content and method.

The Target Audience

Who is most likely to need or to be interested in your program? Why? And how do you know? __________________________________________________________

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How would you describe these people? __________________________________________

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Who are they? Where are they? _______________________________________________

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What’s on their minds? What is important to them? ______________________________

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Whom do they believe or trust? Who influences them? __________________________

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The Product
What is the product or behavior you’re asking people to adopt? ________________________
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What exactly will people get by adopting this behavior? What is the value or the benefits-they will gain? What will they learn or experience? _________________________________
________________________________________________________________________________
________________________________________________________________________________
Describe your program or activity. What will happen? How long will it last? Will it happen just once, or is it a series of classes or events? What will the people do? What will they take home? __________________________________________________________________________
________________________________________________________________________________
________________________________________________________________________________
Why is your program important right now? Is it a response to a local need, situation, crisis, or event? Is it especially timely, because of the season of the year or because of an upcoming event? Does it address a critical issue for your audience?
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________________________________________________________________________________
Your Market Position
From the audience’s point of view, what is the competition for your product? ________________
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________________________________________________________________________________
How is your product better than the competing one? _________________________________
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The “Price” of Your Program
What are the tangible costs for your target audience? Is there a fee? Will they have to purchase materials or equipment?____________________________________________________
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What are the intangible costs? How much time will it take? Does participating in the program or adopting the behavior mean admitting the person has a problem? How does it affect the person’s self-esteem? What is the risk?____________________________________
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What can you change to make the “price” most attractive to your target audience?________________________________________________________________________________
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The Place for Delivering Your Product
Where can you reach your target audience? Where do they spend much of their time?________________________________________________________________________________
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When is the “teachable moment”? Where and when do they make decisions about engaging in the behavior you’re advocating? ________________________________________________
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Promoting the Product

Which communication channels are most likely to reach and to influence your target audience?
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Which promotional tools or message formats are best for reaching your audience?
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Who are the most believable and influential people who can speak to your target audience?
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Here are some possible communication channels and tools to keep in mind:

**Television:** News reports, interviews, PSAs
**Radio:** Shows, Interviews, PSAs
**Magazines:** Articles, Letters, Ads
**Newspapers:** Articles, Columns, Letters, Op-Ed Pieces, Ads
**Billboards:** Ads
**Public Transportation:** Ads, Flyers, Posters
**Brochures/Fact Sheets**
**Mail:** Newsletters, Direct Mail
**Interpersonal Communications**
**Community:** Events, Exhibits, Flyers, Brochures
**Workplace:** Events, Posters, Brochures
**Point of purchase:** Posters, Brochures, Events, Exhibits
**Internet:** Web site, E-mail
**Fairs/Tradeshows:** Exhibits, Flyers, Brochures
**Classes:** Single Events or Workshops, Class Series
Developing Your Message

Theories of Behavior Change
Social marketing, like commercial marketing, has the ultimate goal of changing the behavior of the target audience. Therefore, understanding how human beings change their behavior can help you in crafting the most persuasive messages.

The leading theories of behavior change include:

Health Belief Model

Theory of Planned Behavior

Social Cognitive Learning Theory

Stages of Change Theory

Diffusion of Innovations

To help us avoid theory overload, in her book *Hands-On Social Marketing: A Step by Step Guide*, Nedra Kline Weinreich very kindly distills the major points of all these theories into the following:

To achieve a change in behavior, a person must

- believe that he or she is at risk for the problem, and that the consequences are severe.
- believe that the proposed behavior will lower his or her risk or prevent the problem.
- believe that the advantages of performing the behavior (benefits) outweigh the disadvantages (costs).
- intend to perform the behavior.
- possess the skills required to perform the behavior.
- believe that he or she can perform the behavior.
- believe that the performance of the behavior is consistent with his or her self image.
- perceive greater social pressure to perform the behavior than not to perform it.
- experience fewer barriers to perform the behavior than not to perform it.
Assembling Your Ideas
Who are your target audience and what are they like?

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What are the most important benefits they will see for adopting the product or behavior? Which are most interesting and attractive? Think about tangible and intangible value or benefits.

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What are the biggest costs or consequences of adopting the product?

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What are the biggest costs or consequences of not adopting the product?

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What do they feel they need in order to adopt the product?

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What are the greatest social pressures relating to the issue?

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________________________________________________________________________________
What is their perceived risk of being affected by the problem?

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What beliefs or perceptions (correct or incorrect) do they have about the issue?

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What language do they use to talk about the issue?

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What special communication needs does the target audience have? (Low literacy level, non-English speaking, cultural speech patterns)

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What should the target audience do in response to your communication?

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When and where is the “teachable moment” for your audience? Which communication tools will help you reach them at those places and times?

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________________________________________________________________________________
Constructing The Image

By image, think not just in terms of pictures or graphics, but of image as personality.

What image should distinguish the behavior you advocate?

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What adjectives can you use to describe the image you want to communicate?

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________________________________________________________________________________
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What tone is appropriate to achieve that image? Serious, funny, friendly, hip, folksy, scary, dramatic, businesslike, emotional, or something else?

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How can you convey the desired image? Words, music, pictures, fonts, actors?

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________________________________________________________________________________
________________________________________________________________________________
A Word about Research

Research can play an important role in your social marketing effort in a number of ways. Research is important in:

- understanding the issue
- understanding your audience and how to target them effectively
- testing communication methods or messages to see which are most effective with the audience
- evaluating your efforts, to see if and to what extent the target audience adopted the behavior change

Sources of Existing Research

The good news about research is that it doesn’t have to be original to be good. There are many sources of excellent research on issues perfect for social marketing approaches, such as health, the environment, safety, and more.

The key is finding research sources that are free. Commercial firms who do this kind of research have paid thousands of dollars to get it, and they usually want thousands if they let you use it.

Look first to government agencies and non-profit foundations and organizations. For example, the Centers for Disease Control, the Surgeon General’s office, and the National Institutes of Health are great sources of free information on health issues, including health statistics, audience attitudes, and more. The Annie E. Casey Foundation is a wonderful resource for information on the status of children, and they provide the annual Kids Count Databook on their web site. The Kaiser Family Foundation offers excellent research on families, especially those living at or below the poverty line. And, of course, the granddaddy of all statistical agencies, the U.S. Census, is a peerless resource for the demographics of everything from computer ownership to grandparents raising grandkids.

State-level agencies and organizations can be valuable sources of even more specific information. The Department of Health or Bureau of Vital Statistics may have information on the incidence of disease, chronic conditions, pregnancies, birthweights, and more, even for an individual county. The state wildlife or parks agency may have information about land use or fragmentation; water authorities about water use; the possibilities go on and on.

If all else fails, you might have to break down and go to the library. Great research can be found in journal articles, books, and even unpublished theses and dissertations.

When You Just Have to Do It Yourself

Sometimes, though, there’s just no substitute for doing your own research, especially if you want to test your specific messages. Your research can be formal and scientific, suitable for your doctoral dissertation, but it doesn’t have to be.

If you want to do something scientific, it might be good idea to get some help. Often, marketing or communications classes at your local college or university are looking for research projects to do. A larger university might have a social sciences research center who can do this, too, but for a fee.
Informal, do-it-yourself methods can be just as helpful. You can work with groups of clients, a committee, people in your Sunday School class, the girls at your daughter’s spend-the-night party—any group of people who are as similar as possible to your target audience.

**Research Methods**

The primary tools for doing research are classified as quantitative—things that can be measured and analyzed objectively—and qualitative—things that have to do with beliefs, attitudes, and feelings.

**Quantitative research methods** include surveys, systematic observation or counts, experiments, and analysis of demographic, epidemiological, or other data. These are great for telling you how many people believe or behave a certain way, or have a certain condition or characteristic. They can also tell you which characteristics or behaviors are related to each other, and what the probability is that a change in behavior was related to exposure to your messages.

**Qualitative research techniques** include focus groups, in-depth interviews, content analysis, and town meetings, and they help you understand the “why” of your issue. They help you better understand things from the audience’s point of view, helping you to see, not just *what* they think or do, but *why*.

Both types of research are extremely valuable, and they complement each other. For example, focus groups can help you determine which questions you should ask on a survey. Interviews can help you delve deeper into the results from your survey, to get at the attitudes behind the data. Surveys can help you see if the results from your focus groups generalize to a larger population, or if they were just the idiosyncrasies of the particular individuals participating.
Creating Your Message

A great way to start writing your copy is to follow the AIDA formula. No, you don’t have to sing an aria—it stands for Attention, Interest, Desire, Action. These are the elements your copy should have:

**Attention:** the attention-getter, usually an arresting headline or a big photo or graphic. What will make your audience pay attention?

**Interest:** now that you’ve got their attention, how do you hold their interest? Often, you can do it with statistics, facts, or figures.

**Desire:** what are the ultimate benefits the audience will receive from adopting the behavior you advocate? Think not only of immediate benefits; also consider long-term experiences. What will life be like as a result of adopting this behavior?

**Action:** the call to action. What exactly are they supposed to do? Be specific, and never assume the action is implied. They won’t buy if you don’t come right out and ask them to.

When you’re developing your copy, brainstorm on each of these topics. Use the grid on the next page to record your ideas. Write everything down; you’ll probably find a place to use it all in the different tools you create. And you never know which idea might be the most brilliant and persuasive message ever!
**Action: What do you want the audience to do?**

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Great Sources of More Information on Social Marketing


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* not technically about social marketing, but fantastic, accessible lessons about marketing a service—which is ultimately what education is.

** an environmental emphasis, but the focus on the local community has a great application for Extension.

*** the indispensable guide, practical, readable, and crystal clear.

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