

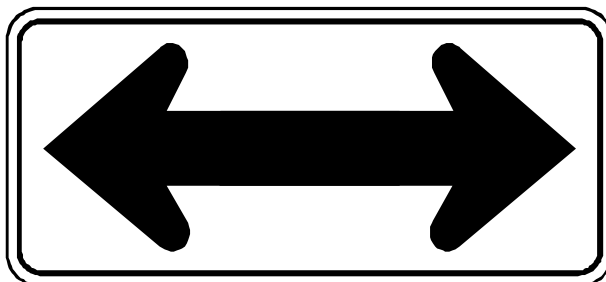


"Power Tools for Producing Powerful Programs" Handbook

A manual developed to accompany
the Social Marketing Training Program
for community and public health specialists.

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"Would you tell me, please, which way I ought to go from here?" asked Alice.

"That depends a good deal on where you want to go to," said the Cat.

"I don't much care where," said Alice.

"Then it doesn't matter which way you go," said the Cat.

Lewis Carroll, Alice's Adventures in Wonderland

TABLE OF CONTENTS

Sections	Page
All About Marketing.....	1-4
Step #1: Assessing Your Environment.....	5-16
The External Environment	
Analyzing Your Community	8-9
How Do You Compare to the Competition?	10-13
The Internal Environment	
An Honest Self-Evaluation	15
How User-Friendly Are Your Services?	16
Step #2: Segmenting Your Market.....	17-23
Why Segment?	17
The Benefits of Segmentation	17
Should You Segment?	18
Do You Have Good Segments?	18
Segmentation Checklist	19
Research Strategies	20
Demand Discovery	21
Demand - Strategy Matching	22
Market Segmentation Exercise	23
Step #3: Settings Goals and Objectives.....	24-25
Writing a Mission Statement	24
Writing Agency Mission	24
Objectives and Priorities	25
Step #4: Developing a Marketing Mix.....	26-37
Establishing a Marketing Position	26
Positioning Research Strategy	27
What is a Marketing Mix?	28
Differentiating Between Services/Physical Goods	29
Product Marketing Mix Development	30-31
Service Marketing Mix Development	32-34
Marketing A Concept	35
Models.....	36-38
The Marketing Process	36
Goldman Program/Services Planning Model	37
Adoption of an Innovation	38

Bibliography..... 39-42

ALL ABOUT MARKETING

5 BUSINESS PHILOSOPHIES

Production
Product
Selling
Marketing
Societal Marketing

A social marketing orientation holds that the main task of the organization is to determine the needs, wants, and interests of target markets and to adapt the organization to delivering satisfactions that preserve and enhance the consumer's well-being.

WHAT IS MARKETING?

Marketing is a social and managerial process by which individuals and groups obtain what they need and want through creating and exchanging products and value with others.

Kotler and Armstrong, 1991

The process of planning and executing the development, pricing, promotion and distribution of goods and services to achieve organizational goals by satisfying consumer wants and needs.

Marketing is not a panacea, but is a viable option with advantages other strategies may be lacking.

GOAL OF MARKETING

The goal of marketing is to know and understand your customer so well that the product or service you develop "fits" or sells itself.

SOCIAL MARKETING

The application of commercial marketing technologies to the analysis, planning, execution, and evaluation of programs designed to influence the voluntary behavior of target audiences in order to improve their personal welfare and that of their society.

Andreasen, 1995

KEY FEATURES OF SOCIAL MARKETING

Consumer behavior is the bottom line
Programs must be cost-effective
All strategies begin with the consumer
Interventions involve 4 P's
Market research is essential to designing, pretesting, and evaluating intervention programs
Markets are carefully segmented
Competition is always recognized

ADVANTAGES OF MARKETING

Improved satisfaction of the target market
Improved attraction of marketing resources- MDs and other employees, volunteers, alliances, funds, public support
Improved efficiency in activities

CRITICISMS OF MARKETING

- *It wastes money
- *It is intrusive
- *It is manipulative
- *It will lower the quality of health care
- *Incompetent providers will advertise
- *Providers will advertise deceptively
- *It will cause health care facilities to compete
- *It will create an unnecessary demand for care

MARKET ANALYSIS

Three tasks:

Determine the current and future size of the available market for your services (market measurement and forecasting)

Determine the main groups making up a market with a view of choosing the best target groups to serve (market segmentation)

Determine the characteristics of consumers, specifically their needs, perceptions, preferences, and behavior, with a view toward adapting the offer to these consumer characteristics (consumer analysis).

MARKET SEGMENTATION

Classifying customers into groups that exhibit different needs, characteristics or behaviors.

Given a set of stimuli all members of a

CONSUMER ANALYSIS

Demographics	Values	Needs
Motives	Influence Channels	
State of Problem Recognition: Stage of Change		
Psychographics: care, health, STD's, MDs...		

VALUES/BENEFITS SOUGHT

prestige	control
esteem	happiness
power	salvation
mobility	family
education	health
love	leisure
privacy	friendship
pleasure	equality
job security	self-respect
political freedom	mutual trust
inner harmony	a world of beauty
independence	financial security
national security	religious freedom

segment should respond in a similar way.

SEGMENTATION VARIABLES

Geographic
region, borough, city size, density, climate

Demographic
age, sex, family size, family life cycle, income, occupation, education, religion, race, nationality

Psychographic
social class, life style, personality, opinions, values, attitudes

Behavioristic
purchase occasion, *benefits sought*, user status, usage rates, loyalty status, readiness stage (*demand level*), attitude toward product

an exciting life	a sense of accomplishment
intelligence	professional development
a world at peace	

MOTIVATIONS

Achievement:	to perform well
Power:	to be in control
Affiliation:	to be close to others
Hostility:	to see others afraid, in pain, worrying
Dependence:	to rely on others to fill needs
Certainty:	able to understand and predict events
Live up to standards:	to live in accordance with values

STAGES OF CHANGE

1. Precontemplation
2. Contemplation
3. Preparation/Commitment
4. Action
5. Maintenance
6. Termination

Exchange comes from a combination, based on consumer analysis, of the right product, at the right price, distributed through the right places, promoted the right way.

STAGES OF CHANGE CONCEPTS

Relapse
Exiting
Self-confidence
Stage-matched interventions/processes

(See Appendix for Stages of Change info.)

DEMAND LEVELS

- | | | |
|-------------|--------------|----------------|
| 1. Negative | 4. Failing | 7. Overfull |
| 2. No | 5. Irregular | 8. Unwholesome |
| 3. Latent | 6. Full | |

INVOLVEMENT

Customer's level of purchase's perceived risk/cost
Influences decision-making process

Low involvement - identify problem, decide, evaluate outcome, if don't like outcome, make a different decision the next time (Spic and Span vs Top Job)

High involvement - identify problem, evaluate choices, decide, evaluates (car or music system choice)

MARKETING MIX

A marketing mix is a number of features, that combined, creates a comprehensive package that members of a specific target group would be willing to exchange something(s) they value, to have.

PRODUCT

Anything that can be offered to a market for attention, acquisition, use or consumption that might satisfy a want or a need (object, person, place, organization, idea, or service).

Core Tangible Augmented

PRICE

Time Money Energy Self- Image

PLACE

Available Accessible Response
 Capable

PROMOTION

Advertising Personal selling Publicity
Sales promotion

Establishing a niche in the customer's mind.
Developing a product profile or personality.
Based on preferred attributes of the product.

CUSTOMER SATISFACTION

Based on consumer's expectations and perceptions of what is happening

BRAND LOYALTY

Repeated use of a particular _____ in preference to competing alternatives or regular use of a specific _____ to meet a specific need.

MORE ON SOCIAL MARKETING

What most people consider social marketing is really nothing more than social advertising: using the potentials of advertising for changing public attitudes and behavior.

Social marketing is much more!

Social marketing incorporates CAREFUL MARKET RESEARCH to learn about your market and the probable effectiveness of alternative marketing strategies.

According to social marketing, it isn't enough to urge people to do or not do something with whatever clever appeal seems to work best: patriotism, fear, guilt, etc.

DEVELOP PRODUCTS. Use existing or develop new products or services that will make it easier for people to adopt a desired behavior.

USE INCENTIVES. Design specific incentives to increase the target market's level of motivation. Social marketing has found the adaptation of sales promotion ideas very effective.

FACILITATE ADOPTION OF NEW BEHAVIORS. Social marketing includes developing convenient and attractive ways for your target audience to not only try your recommended behavior, but to maintain it as well.

WHAT IS SOCIAL MARKETING GOOD FOR?

To disseminate new information/practices
To countermarket
To move people to action

DEVELOPING A MARKETING PLAN

STEP #1: ASSESSING YOUR ENVIRONMENT

The External Environment

The better you understand the context in which you work, the more realistic you can be about your service's goals and objectives, and, the more likely you are to be successful!

Take a look at your environments - your work and your community environments and see how they are going to influence what you do and how you do it - even before you start thinking about what services you want to offer. If you can incorporate these into an existing community needs assessment process so much the better!

1. Name of your organization _____

Community you plan to serve _____

2. What three words best describe the relationship between your organization and the community you plan to serve?

a. _____ b. _____ c. _____

Explain why:

a. _____

b. _____

c. _____

3. What is your competition (circle all that apply)?

- a. STD-related not-for-profit agencies
- b. STD-related for-profit agencies
- c. community values and beliefs
- d. personal values and beliefs
- e. the political situation
- f. poverty
- g. consumer ignorance
- h. consumer indifference
- i. over-the-counter products
- j. preference for treatment rather than prevention
- k. other: _____

4. The STD "industry" in the community you serve is:

[] expanding [] contracting [] staying the same

5. The number of STD services in the community you serve is:

adequate more than adequate less than adequate

6. What is the average income forecast for the community you serve for the coming year?

\$ _____

7. What is the employment/unemployment outlook?

8. Are there any new technological developments that may affect the STD industry in the next year?

No Yes; explain the impact those developments are likely to have on the use of STD services in general in your community.

9. Are there any demographic trends that may affect the use of STD services in your community?

No Yes; explain in detail.

10. Do you think that any of your competitors will attempt to change their STD services?

No Yes; please explain how.

11. Do you think that any of your competitors will attempt to change the market segment(s) - kinds of consumers - they aim at?

No Yes; please explain.

12. In which life cycle stage is your STD service at this time?

introduction growth maturity decline

13. Will any change occur in the life cycle stage of your STD services during the next year?
- No Yes; which stage will your services be entering, and what are the marketing implications of this change?

14. What will client enrollment be for the period of the marketing plan?

- less than we can handle
 what we want to handle
 more than we can handle

How did you arrive at this conclusion? What assumptions are you making?

15. What problems have developed within the past year that should be acted upon in the coming 12 months?

1. _____

2. _____

3. _____

4. _____

5. _____

16. What problems that should have been taken care of within the past year are still evident and must be dealt with in this year's marketing plans?

1. _____

2. _____

3. _____

4. _____

5. _____

Analyzing Your Community

A. Identification

1. Name of community
2. County in which community is located
3. Population
 - a) male/female in terms of adults, children, over 65, and those of childbearing age
4. Does the community correspond approximately with another unit?
 - a) educational district? voting district? health area? community board?
5. Describe the boundaries of your community
6. What type of a community is it?
 - a) industrial, residential, business, etc.
7. What are the major geographical characteristics of the community?
8. Note the major demographic characteristics of the community.
 - a) age
 - b) race
 - c) religion
 - d) ethnicity
 - e) per capita income
 - f) marital status
 - g) place of birth
 - h) citizenship
 - i) languages spoken
 - j) educational attainment
 - k) veteran status
 - l) employment rate
 - m) occupations represented
 - n) insurance coverage
9. Note the major psychographic characteristics of the community.
 - a) attitudes
 - b) opinions
 - c) beliefs
 - d) values
 - e) motivator
10. What are the main economic bases in the community?
11. How is the community organized politically?
 - a) political structure
 - b) political powers, formal and informal

B. Resources in the Community

12. Note special items of interest in regard to the following types of community resources: (# and utilization rate)
 - a) educational
 - b) health and medical
 - c) recreational and leisure time
 - d) welfare and civic
 - e) religious

f) housing and community facilities (transportation, utilities, etc.)

(over)

III. Problems in the Community

13. Describe problem areas within the community
14. Describe special problems connected with any groups within the community
15. Describe significant conflicts or tension situations in the community
16. Describe economic problems within the community.

IV. Community Appraisal

17. Describe the dominant social value characteristics of the community (refer to psychographics, above)
 - a) traditions, interests, concerns
18. Does the community have a positive sense of identity, loyalty?
Describe.
19. Is the community characterized by having a great deal, a fair amount, or hardly any autonomy in control over its specific organizations?
20. In respect to health and social welfare, what are the major strengths and weaknesses of this community?

How Do You Compare To The Competition?

Take a good objective look at your agency. Talk to people. Ask questions. Find out:

1. What resources do you have to "play with" (list 'em all!)?

a. Individual _____

b. Organizational _____

c. Material _____

d. Financial/Pro Bono _____

2. In terms of the competition, do you provide superior STD services?

No; explain (be honest) Yes; explain (be honest; don't spare yourself):

3. Compared to the competition, do you have superior advertising?

No; explain: Yes; in what ways?

4. Do all the people you want to serve have better access to your services than they do to your competition's services?

No; explain: Yes

5. Are you able to price your STD services below the prices of your competitor's services?

No Yes

6. Generally speaking, is there anything else that your STD service agency can do more effectively than your competitors?

No Yes; please explain:

7. What are your limitations?

8. What are the strengths and weaknesses of each of your agency's major "competitors"?

Competitor 1: _____ Strengths Weaknesses

Services:			

Providers:			

Sites:			

Promotion:			

Price:			

Competitor 2: _____	Strengths	Weaknesses
Services: _____	_____	_____
	_____	_____
	_____	_____
	_____	_____
Providers: _____	_____	_____
	_____	_____
	_____	_____
	_____	_____
Sites: _____	_____	_____
	_____	_____
	_____	_____
	_____	_____
Promotion: _____	_____	_____
	_____	_____
	_____	_____
	_____	_____
Price: _____	_____	_____
	_____	_____
	_____	_____
	_____	_____

Competitor 3: _____	Strengths	Weaknesses
Services: _____	_____ _____ _____ _____	_____ _____ _____ _____
Providers: _____	_____ _____ _____ _____	_____ _____ _____ _____
Sites: _____	_____ _____ _____ _____	_____ _____ _____ _____
Promotion: _____	_____ _____ _____ _____	_____ _____ _____ _____
Price: _____	_____ _____ _____ _____	_____ _____ _____ _____

Analyzing Pertinent STD Service Organizations

ITEM	ORG. #1	ORG. #2 etc.
Name	_____	_____
Purpose	_____	_____
Major Services	_____	_____
Number of Clients	_____	_____
Type of Clients (Restrictions?)	_____	_____
Service Hours	_____	_____
Key Services	_____	_____
Organizations With Which It Has Special Ties	_____	_____
Types of Auspices	_____	_____
Funding Sources	_____	_____
Formal Locus of Its Decisions	_____	_____
Ultimate Authority	_____	_____
Major Community Controls	_____	_____
Other Interesting Data	_____	_____

The Internal Environment

No matter how well you know your external environment and the competition, above all else you need to be brutally honest with yourself about the realities of your own organization and department. Even if everything else in your planning indicates that you have the green light to go ahead, neglecting to assess (very early on) your own performance potential, resources, and limitations will sooner or later cause programmatic gridlock - it's only a matter of time.

Take a look at the services you offer, the staff that offers the services and the administrators who oversee the management of the service.

An Honest Self-Evaluation

Agree or Disagree?

Do managers in your organization agree or disagree with the following statements? If you can ask them directly, great; otherwise rely on your "reading" of them. Circle "A" if they agree, "D" if they disagree.

Managers/administrators in this organization agree/disagree with the following statements:

- | | | |
|--|---|---|
| 1. The services that we offer are inherently desirable. | A | D |
| 2. Potential clients lack interest in the services we offer because they don't appreciate the value of the services. | A | D |
| 3. Customers understand our services. It's just that we haven't found the right incentives to motivate them to use these services. | A | D |
| 4. Administration needs to focus on promoting agency services. | A | D |
| 5. The role of consumer research is secondary. | A | D |
| 6. The objective is to identify one best marketing strategy. | A | D |
| 7. It's ok to ignore the competition. | A | D |
| 8. The best staff is made up of STD care specialists. | A | D |

The question is, does this exercise show that management has a customer or agency orientation?

If your goal is to establish a marketing orientation, planning based on consumer research is essential. Think about it. (How about your own philosophy? Is it naturally customer oriented?)

How User-Friendly Are Your STD Services?

STD services should be available, accessible, adequate, and acceptable. Are yours?

Here are some basic questions to ask yourself. See if you can think of other ways STD services can be user-friendly and add some of your own questions.

1. Is there convenient public transportation to your STD service facility? Yes No
2. Does staff speak the language of the clients? Yes No
3. Is there someone available to explain financial matters? Yes No
4. Is the waiting time to participate reasonable - to the client? Yes No
5. Is the waiting time before or during the actual service offering reasonable - to the client? Yes No
6. Is the STD service facility neat and clean? Yes No
7. Are your service hours convenient - from the clients' or potential clients' point of view? Yes No
8. Does a client get to see the same care provider at least most of the time? Yes No
9. Were people told what they needed to bring to the clinic before they came for the service? Yes No
10. Do staff treat clients with respect - from the client's point of view? Yes No
11. Are efforts made to see that people are comfortable and at ease? Yes No
12. Do you have some formal means of assessing customer satisfaction? Yes No
13. Are your services services clients have requested? Yes No
14. Have you ever changed a service in response to a client's suggestion? Yes No

Think about what this exercise says about the focus of your attention when developing services.

STEP #2: SEGMENTING YOUR MARKET

Why Segment?

In marketing, the first thing you learn is that one size does not fit all. It is up to the agency to (a) identify different market segments, (b) select one or more of these segments as target populations, and (c) develop marketing strategies or positions tailored to each target population. This section deals with items a and b. Market positioning and marketing strategy development don't happen until step #4. But...

Editor's Note:

Resist temptation...do not skip ahead to step #4 at this point, no matter how strong the urge is. If you really are committed to trying a marketing approach, you need to understand that there are no short-cuts, at least not when it comes to marketing process steps.

Benefits of Segmentation

Market segmentation is classifying customers into groups exhibiting different needs, characteristics or behaviors. Each market segment should consist of consumers who respond in a similar way to a given set of stimuli. If you analyze your market real well and develop a thorough knowledge and understanding of a few major target populations, you'll find yourself in the position of having created a few major marketing campaigns so well geared to particular audiences that they are almost guaranteed to succeed!

Identifying different market segments means getting to know your community so well that you can divide your market into distinct groups of potential clients based on their needs and wants. The trick is to not end up with too many subgroups, but instead to identify a few major groups of clients that differ from each other in their STD service needs and wants and/or their marketing responses.

Based on what you know about your community you might divide your market by:

Geography: countries, health areas, census tracts, etc.

Demography: age, sex, family size, family life cycle stage, income, occupation, education, religion, race, or nationality

Psychographics: social class, lifestyle, personality

Behavior: service use occasions, service benefits sought, service user status, service usage rate, agency loyalty, service use readiness stage, or attitude toward service

To be useful, market segments must be measurable, accessible, substantial, and actionable.

Should You Segment?

Ask yourself the following questions about the community you serve:

1. Is the community you seek to serve identifiable and measurable? Yes No

Objectively and subjectively, do you really think it has potential compared to other communities? Is your community a large enough market for STD services to be subdivided into smaller homogeneous groups? Of all the members of your community concerned with reproductive health and family life issues, what percentage are prime candidates for prenatal care services?

2. Is the market big enough to support more than 1 marketing approach? Yes No

3. Are potential clients easy to reach? Yes No

4. Will the potential clients you have identified respond? Yes No

The identification of a reasonable number of potential clients that can be reached is of little value if they are nonresponsive to your marketing efforts. Thorough marketing research will assist in determining whether there is a genuine need for your STD services before expensive promotional dollars are spent.

If you can answer "yes" to all four questions, segmentation is a worthwhile undertaking.

Do You Have Good Segments?

Ask yourself the following questions. If the answers are "yes", you're in good shape!

1. Do the members of each segment fit some sort of "typical profile"? Yes No

2. Are each of the segments distinctive? Does each have its own personality? Is it clear which group an individual belongs to based on key defining characteristics of the groups? Yes No

3. Are the segments of sufficient size to warrant marketing your STD services? Does combining a couple of mini-segments provide a sizeable homogeneous target population to work with? Yes No

4. Does the information you have about each group provide you with operational information that is practical, usable, and can readily be translated into marketing strategies? Yes No

Segmentation Questionnaire*

1. What are some of the possible market segments for your STD services?
2. How do these segments compare with your present STD customer profile(s)?
3. How large are these STD potential target markets?
4. What is the expected profitability of serving these STD submarkets?
5. How are these STD segments defined? (names, sizes, key variables)
6. What is unique about the specific groups?
7. Where are the potential STD customers located?
8. How much should be allocated to the various markets, now, and in the future?
9. What segments are competitors pursuing?
10. What unique niche - competitive advantage - does your company have compared to others in the market?
11. What past segmentation studies have been employed?
12. How useful were past segmentation findings/strategies?
13. Who are the heavy users for your services?
14. What features or benefits are sought by clients or potential clients?
15. What alternative marketing strategies and tactics are available?
16. Do your services meet segment needs? Are any changes required?
17. What promotional appeals can best be used toward the target markets?
18. How price sensitive are the markets?
19. What role do service sites play in the market?
20. How will client service use behavior be monitored to measure marketing effectiveness?

*Adopted from: Weinstein, Art, (1987). Market Segmentation: Using Demographics, Psychographics and Other Segmentation Techniques to Uncover and Exploit New Markets, Chicago: Probus Publishing Company, p. 40.

Research Strategies
or
How to Find Out About Your Community or Market Segment
Without Writing a Dissertation

Resources

Current clients
Past clients
Potential clients
Service providers from your agency
Service providers from other agencies
Community Board staff
Community Board profiles
Police
Community directories
School District staff
Significant others of potential, actual clients etc.
Vital Statistics Department of Health Dept.
Yellow pages
Opinion leaders
Key informants
Newspaper clippings

Strategies

One on one interviews
Focus groups
Written questionnaires
Panels
Telephone surveys
Library research
"Walk about"
Meeting
Brainstorming

Demand Discovery Activity

How would you describe the demand for STD services among members of the community you serve (circle all that apply and note which target population it applies to):

1. A major part of the market you're trying to reach dislikes the concept of STD care and is willing to "pay a price" to avoid it.

[] Yes: _____ [] No; go to number 2.
(target population)

2. The target consumers are uninterested or indifferent to the concept of good sexual health.

[] Yes: _____ [] No; go to number 3.
(target population)

3. A substantial number of consumers share a strong desire for STD services that are not being satisfied by any existing product or service.

[] Yes: _____ [] No; go to number 4.
(target population)

4. The demand for STD services, having reached its peak, is falling off.

[] Yes: _____ [] No; go to number 5.
(target population)

5. The demand for STD services varies depending upon the season, day, or time of day.

[] Yes: _____ [] No; go to number 6.
(target population)

6. Your agency is pleased with the amount of STD business it has.

[] Yes: _____ [] No; go to number 7.
(target population)

7. Your agency has a demand for its STD services that is higher than you want/can handle.

[] Yes: _____ [] No; go to number 8.
(target population)

8. The demand for certain "dangerous" STD services or products is overwhelming.

[] Yes: _____ [] No
(target population)

Demand - Strategy Matching

Based on our discussion of demand states and their names, which marketing strategy is appropriate for which demand state?

Place the appropriate strategy letter next to the appropriate demand state number. Or, if you want, just draw lines directly to corresponding demand states and their strategies.

<u>Demand State</u>	<u>Strategy</u>
<input type="checkbox"/> 1. Negative demand	A. Find ways to reduce the demand temporarily or permanently: demarket.
<input type="checkbox"/> 2. No demand	B. Measure the size of the potential market and develop effective services that would satisfy the demand.
<input type="checkbox"/> 3. Latent demand	C. Maintain demand at its current level in the face of the ever-present possibility of changing consumer preferences and more vigorous competition.
<input type="checkbox"/> 4. Falling demand	D. Get people who like something to give it up: fear communications, price hikes, reduced availability of services.
<input type="checkbox"/> 5. Irregular demand	E. Analyze why the market dislikes the services and whether a marketing program can change the market's beliefs and attitudes through service redesign, lower prices, and more positive promotion.
<input type="checkbox"/> 6. Full demand	F. Find ways to connect the benefits of the product with the target group members' natural needs and interests.
<input type="checkbox"/> 7. Overfull demand	G. Find ways to alter the time pattern of demand through flexible pricing, promotion, and other incentives.
<input type="checkbox"/> 8. Unwholesome demand	H. Reverse the declining demand through creative remarketing of the services.

MARKET SEGMENTATION ACTIVITY

Circle up to 20 but no less than 10 variables/characteristics that describe a population in your community with STD concerns with which you are very familiar. Assume that you have conducted market research that has revealed this profile to you. Select one response only from each category. Circle or write in the best response.

COUNTIES OR MUNICIPALITIES	SEX	AGE	MARITAL STATUS
_____	Female Male	Pre-teen Teen Young Adult Adult Senior	Single, never married Single, divorced/separ Married Co-habiting, single Domestic partners
ECON. STATUS	RELIGION	OCCUPATION	EDUCATION
Lower Upper lower Lower middle Middle Upper middle Upper	Catholic Protestant Jewish Agnostic Atheist Other: _____.	Students Drop outs Blue collar White collar Unemployed Other: _____.	Jr. High Sr. High Vocational Bachelors Masters Doctorate
RACE	NATIONALITY	STD INFO SOURCE	POLITICS
Oriental Black Caucasian B - Hispanic W - Hispanic Am. Indian Other: _____	American Canadian Haitian African Cambodian Italian Other: _____	Friends Family-not partner Partner Nurse Doctor Brochures Other: _____	Democratic Republican Independent Socialist Communist Other: ____
MAJOR BENEFIT SOUGHT	USER RATE STAGE	READINESS SERVICES	ATTITUDE TOWARD
Qual. family life Health: own, partner Peace of mind Sample products Dx of problems Immediate care Quality care Reassurance Socializing Compliance w/ reg.	Never Occasional Frequent Regular	Awareness Interest Mental trial Small trial Adoption	Indifferance Positive Negative Curiosity
MAJOR VALUE	MOTIVATION	NEEDS	MEDIA
Family Prestige Friendship Privacy Self-respect	Power Affiliation Achievement Dependence Hostility	Food/shelter Safety Belonging Self-esteem Actualization	TV Radio Newspapers Print ads

Security

STEP #3: SETTING GOALS AND OBJECTIVES

Organizational Goals/Mission

Every organization has one basic mission statement that is the fundamental crux of all its activities. In an organization that provides multiple services, a marketing plan is necessary for each individual program or service offered to the market. However, before you even begin to think about developing appropriate marketing objectives for any individual product or service, a clear understanding of your agency's overall objectives is absolutely necessary. The long-term vision of where your agency is going establishes the boundaries within which objectives, strategies, actions (program and service development) must be developed.

Ideally, this is the third step of your planning, and follows environmental analysis and needs assessment. For the sake of this exercise, let's assume that your organization developed its initial mission statement as a result of environmental analysis and needs assessment efforts conducted in the past (with frequent, timely updates).

Write down your agency's mission statement making sure to address how which needs of what consumers will be satisfied. Your statement should answer the questions:

1. Who is to be served and satisfied?
2. What consumer need(s) is (are) to be satisfied?
3. How are consumer needs going to be satisfied?

This is probably the hardest part of the marketing planning process, so don't be discouraged if this is harder or takes longer than you expected.

Sample Mission Statement

The goal of the March of Dimes is the prevention of birth defects through medical research, public and professional education, and advocacy.

1. Babies, their families, and society are served.
2. The need to prevent premature death and disability is satisfied.
3. Premature death and disability prevented via research, education, and advocacy.

Write Your Agency's Mission Statement

1. Who served: _____
2. What need satisfied: _____

3. How is that need satisfied: _____

Objectives

Your objectives or strategies depend on who you are going to serve, and in what context. That's why the assessment of the environment and the market analysis that you've done as part of steps #1 and #2 are so important.

Given the current situation in your community with respect to STD services use, competition, and the forecasted state of the environments for the next 12 months, what set of STD services objectives should your agency establish? Refer to your demand-strategy match sheet to refresh your memory of what marketing strategies are called for.

Target Population: _____ Rank: _____

Objectives: _____

Target Population: _____ Rank: _____

Objectives: _____

Target Population: _____ Rank: _____

Objectives: _____

Target Population: _____ Rank: _____

Objectives: _____

Next to each target population, indicate a priority rating (1 - 5) based on your resources and your opportunities for success.

My Agency's Top Three Marketing Priorities

1. _____
2. _____
3. _____

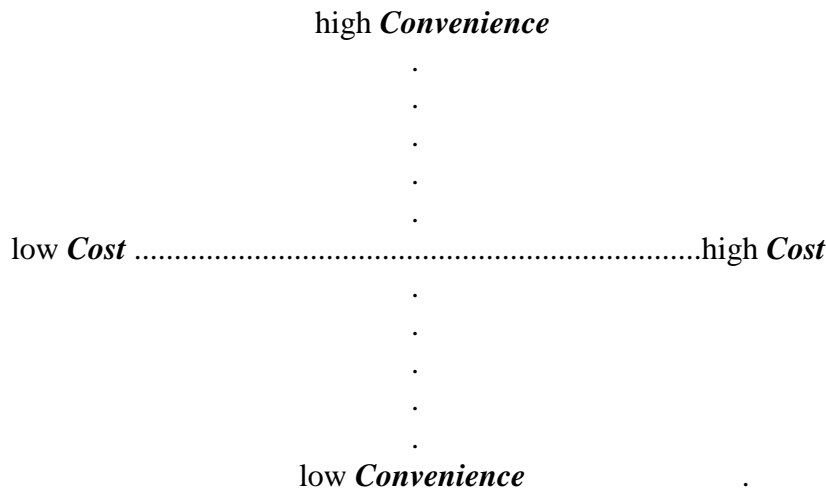
STEP 4: DEVELOPING A MARKETING MIX

Establishing a Marketing Position

Let's say that you decide to "go after" teenage males at risk for getting an STD for the first time...as opposed, let's say to older men getting it for the second, third, or fourth time. You then need to identify all of the STD services currently available to clients in this teen market segment.

You recognize, of course, that these services differ in their performance characteristics, advertised appeals, prices, and so on. Any two of these services could be weakly or strongly competitive, depending on how different or similar they seem to be to potential clients. You as the marketer need to identify some way to represent the competitive relations among the current services and the degree to which they cover the range of client desires.

The key lies in recognizing that every service is a bundle of perceived features. Therefore, one way of comparing services is to identify where you stand on features that are critical to the potential client when it comes time to decide whether or not to use an STD service, and if so, which one. Using a position map can help and it works when positioning your agency and your services.



The objective is to identify an area of unsatisfied customer want and then, if possible, fill it.

Depending upon what your research shows, you can position your agency and/or particular STD services for males as either the:

- | | |
|----------------------|---|
| Safest | Most linked to related support services |
| Most convenient | Fastest |
| Highest quality | Nearest |
| Warmest, friendliest | Most inter-active |
| Most professional | Most culturally sensitive |
| Lowest cost | Private, confidential |
| Most comprehensive | Least judgmental |

Remember, you can't pick out the feature. It's the client or the potential client's perception of what is important that counts and that must form that basis of your positioning effort. Your objective is to establish a clear, distinctive, and desirable place in the market and in the minds of target clients.

Positioning Research Activity

Waiting room exercise for target group women you serve;

Laundramat (park, housing project) exercise for target group women you'd like to be serving.

Materials:

flip chart paper; magic marker; masking tape
(optional) smaller sheets of paper - enough for all in group
(optional) 10 8 1/2 x 11 sheets of paper

Time:

Minimum of 15 minutes up to 45 minutes

Objective:

To determine what features of a STD service are most important to the target women you want to reach.

Group size:

More than 5; must include target group women, to be valid!

Procedure:

1. Explain to the women that in order to serve them well, you need to know what is important to them.
2. Ask them to call out (or write down on individual pieces of paper) what they look for in a good STD service agency. Write down everything they say or have written on a sheet they can see.
3. Ask the women if some items can be combined; narrow list to 7 - 10.
4. Write down the 7 - 10 features, one per sheet of paper, and using masking tape, hang them up on the wall.
5. Ask the women, as a group (if group is too large, subdivide into smaller groups) to eliminate the three features they think are the least important of all the features on the list if there are more than 7 and then to rank the remaining features in their order of importance: 1 is most important, etc. Let them order and reorder the pieces of papers on the wall. Give them 10 minutes to do this.
6. Ask them to present their results and their rationale. Take notes!
7. Thank them for their time and say that your agency will do its best to improve or add those features to their STD services.

What Is a Marketing Mix?

Once you have a positioning strategy, you are then ready to begin planning the details of the marketing mix. The marketing mix is one of the major concepts in modern marketing.

A marketing mix is the set of controllable marketing variables that an agency blends together to produce the response it wants in its target population.

A marketing mix is a number of features, that combined, creates a comprehensive package that members of a specific target group would be willing to exchange something(s) they value, to have.

In other words, the marketing mix is everything your agency can do to influence the demand for its STD services. "Everything" basically includes 4 different areas known as the 4 P's:

Product

Price

Place

Promotion

You may hear or have already heard references to other "P's" in the future. However, the four mentioned here are the most fundamental to marketing. Once you have learned and mastered these four concepts, then you can expand your marketing mix development to consider "P's" that have been added to the list over the past few years. These "P's" are: partnership, purse-strings, publics, and policy. (Actually, if you've done a thorough Environmental Assessment, you've already looked into these concerns.)

Product refers to the services you offer to satisfy (potential) clients' needs and wants.

Price refers to the social, psychological and economic costs of using the service.

Place refers to service sites and their level of availability and accessibility.

Promotion refers to incentives, personal selling, public relations, and advertising strategies.

The activities on the following pages will help you to determine appropriate marketing mixes for your priority target populations.

Remember, no one "P" is any more important than any other.

If you ignore one "P," the whole strategy suffers.

And if your marketing mix doesn't seem to be working, look at all 4 P's. Promotion can not

salvage a poor service, an unrealistic price, or service access problems.

Differentiating Between a Service and a Physical Good

The characteristics listed below are more true of one kind of product than the other. Put an "S" next to the characteristics more true of services and a "PO" next to characteristics more true physical offerings.

1. _____ Essentially intangible
2. _____ Does not result in the ownership of anything
3. _____ Can be seen, tasted, felt or otherwise sampled before purchase or use
4. _____ Whether you purchase it or not is influenced by other customers
5. _____ Can be tested before purchase
6. _____ Its physical setting plays a more decisive role
7. _____ Is produced, stored, sold, then consumed or used
8. _____ Can be demonstrated or sampled before purchase/use
9. _____ Its quality varies and is harder to control
10. _____ Its provider is part of the product
11. _____ Its quality can be controlled by weighing, measuring, and comparing it to a standard
12. _____ It doesn't exist until it is called for; must be produced on demand
13. _____ Takes of up shelf space, has a shelf life, can be inventoried, depreciates
14. _____ Is sold, produced and consumed or used (often) at the same time
15. _____ Is evaluated against the consumer's judgment/expectations
16. _____ Its number of users/purchasers not as likely to vary from time to time
17. _____ Can be recalled
18. _____ Is experiential
19. _____ Is more dependent on the quality and ability of its provider
20. _____ Your expectations of it may vary
21. _____ Is concrete, easier to describe and/or understand
22. _____ May result in mutual dependence between the provider and the customer

PRODUCT MARKETING MIX DEVELOPMENT

Given the characteristics of the priority target group you have just described, you are going to create a marketing strategy for a STD product (PHYSICAL OFFERING) for one of your priority target populations.

Your target population is: _____

BUT... BEFORE DOING ANYTHING, ANSWER THESE QUESTIONS:

1. What STD prevention or treatment products best fit the needs, values, motivations of this group?

ANSWER: _____

These are the products you will be promoting, pricing, and placing.

2. What price tag is attached to these particular products/physical offerings?

ANSWER: Approximately \$ _____ the first year.

This is the price you will incorporate into your promotional piece.

3. Where are these products/physical offerings distributed and by whom? Pick one or more distribution channel you think your group will really use: (Clinic, supermarket, private physician's office, school-based clinic, pharmacy, drug store, rest room, mail order, hospital, department store, other - specify). Rank order them: 1 = most likely to be used.

ANSWER: _____ []
_____ []
_____ []
_____ []
_____ []
_____ []

4. Which promotion methods will work best to appeal to the group you have described: advertising, public relations, personal selling or promotional events/incentives?

ANSWER: _____

A combination of strategies is probably best, if you can afford it, and if they are appropriate.

5. How does your product and its attributes compare with the competition? Can you identify two attributes of STD services that are most important to the group you described above and visualize how your services compare with other services? Graph where the competition

stands and where your product stands. This is positioning - seeing how consumers view your product in relation to others.

REVIEW OF PRODUCT/PHYSICAL OFFERING MARKETING MIX

SEGMENT

DESCRIPTION: _____

PRODUCT: _____
Answer #1

PRICE: _____
Answer #2

PLACE: _____
Answer #3

PROMOTION: _____
Answer #4

POSITION: _____
Answer #5

Challenge:

You now have the elements of a STD product marketing strategy.

Always focus on the characteristics of the group you want to reach.

If the characteristics change, your marketing mix will, too.

SERVICE MARKETING MIX DEVELOPMENT

Marketing a service is not the same as marketing a product, though there are similarities.

Keeping in mind the same target population you used in the first exercise, let's focus on marketing specific STD services to members of that group.

1. What specific services do people in this group need and/or want?

Remember, your answer must be based on their perceptions, not on yours!

ANSWER: Services this population needs and/or wants include...

- [] 1. _____
- [] 2. _____
- [] 3. _____
- [] 4. _____
- [] 5. _____

Put an "x" next to the one they probably want the most.

Since this is essentially a fantasy, these perceived needs and wants now become the service product you will offer. Based on the work you have done to analyze your agency and the environment (community) in which you work, in reality, your next step is to modify your service package to take into account the financial, personnel, environmental and political realities of your organization and any competitors in your field.

2. What is the price tag on the services to be offered?

ANSWER: \$_____ per service
or

low, moderate, expensive, scaled to income

3. What channels for services distribution are favored by your group?

(Clinics, hospitals - city, private, voluntary - private physicians' offices, home visits, store fronts, civic and/or religious organizations, etc.)

ANSWER: Service site preferences include...

- [] 1. _____
- [] 2. _____
- [] 3. _____
- [] 4. _____
- [] 5. _____

Place an "x" next to the one you feel your group will use the most.

4. Which promotional strategy will your group respond to most favorably:

ANSWER:

- advertising
- public relations
- personal selling
- promotional events/incentives

5. How do your services' attributes, cost, and distribution channels compare with those of the competition? Graph your position using the features you have determined are most important to the target group you hope to reach.

REVIEW OF A SERVICE MARKETING MIX

SEGMENT

DESCRIPTION: _____

SERVICE:

Answer #1

What are its tangible components? _____

What are its more intangible components (that might arouse uncertainty in clients)?
How do you plan to reduce clients' sense of risk and uncertainty about the service?

Intangible Components

Risk Reduction Strategies

Intangible Components	Risk Reduction Strategies
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

PRICE:

Answer #2

PLACE:

Answer #3

PROMOTION:

Answer #4

POSITION:

Answer #5

Challenge:

You now have the elements of a STD product marketing strategy. Always focus on the characteristics of the group you want to reach. If the characteristics change, your marketing mix will, too.

MARKETING A (SEXUAL HEALTH) CONCEPT

It is much more difficult to market concepts, ideas and causes than it is to market products and services. The major reason is the intangibility of the idea. Even though a service is more intangible than a specific product, its components can be made tangible.

Remember, you are competing with many social issues in your community, such as...

55 mph speed limit	Mental health	Accident prevention
Motorcycle helmet use	Alcoholism prevention	Blood donation
Obesity prevention	Child abuse prevention	Physical fitness
Drug abuse control	Pollution control	Drunk driving
Population control	Euthanasia	Recycling wastes
Family planning	Seat belt use	Flouridation
Smoking cessation	Gay rights	Suicide prevention
Immunization		

Some concepts are easier to market than others.

Marketing the Concept of Going For STD Care

1. Create and maintain awareness
2. Increase knowledge about STD
3. Motivate at risk segment toward going for STD care
4. Demonstrate and teach specific skills needed to modify behavior
5. Promote social support and positive reinforcement to maintain participation in STD care
6. Coordinate efforts to leverage scarce resources

Difficulties in Marketing STD Prevention

The emphasis of true primary prevention is on actions to be taken by consumers and these actions have certain striking characteristics in common**:

1. They necessitate giving up things that many or most people like.
2. They are often unpleasant in themselves (at least for many people).
3. They must last, not for a few days or even years - but a lifetime.

GOLDMAN PROGRAM/SERVICES PLANNING MODEL

NEEDS ASSESSMENT

Environment

1. Internal
2. External

Market

1. Attitudes and values toward information
2. Attitudes and values toward health services
3. Attitudes and values toward health behavior
4. Demographics and lifestyles and media habits
5. Benefits sought by potential clients

GOAL SETTING

MARKET SEGMENTATION

<u>Segment #1</u>	<u>Segment #2</u>	<u>Segment #3</u>
MEASURABLE	MEASURABLE	MEASURABLE
OBJECTIVES SETTING	OBJECTIVES SETTING	OBJECTIVES SETTING
POSITIONING	POSITIONING	POSITIONING
MARKETING MIX DEVELOPMENT	MARKETING MIX DEVELOPMENT	MARKETING MIX DEVELOPMENT

PROGRAM IMPLEMENTATION

Program 1	Program 2	Program 3
Process, Impact, Outcomes Evaluation:	Process, Impact, Outcomes Evaluation:	Process, Impact, Outcomes Evaluation:
Changes in program; client knowledge, attitudes, or behavior (product use); or STD morbidity/mortality	Changes in program; client knowledge, attitudes, or behavior (product use); or STD morbidity/mortality	Changes in program; client knowledge, attitudes, or behavior (product use); or STD morbidity/mortality

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