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Guest-Editors: Dora Agapito and Helena Alves

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Marketing and Society: Beyond Profit

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Placing Social Marketing in the Practice of Corporate Social Responsibility: Focusing on Environmental Issues
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USING CORPORATE SOCIAL MARKETING IN THE POWER SECTOR: A CASE STUDY ON ENERGY EFFICIENCY

*Andrea Saraiva
Patrícia Pinto
Dora Agapito*

ABSTRACT

This research was conducted both in Portugal and Brazil and explores energy efficiency (EE) behavioral change programs implemented by a non-state-owned company selling electricity to residential consumers in both markets. In order to understand to what extent the corporate social marketing (CSM) framework is being used in these programs, the motivations of non-state-owned companies to implement EE programs and the approach underpinning these projects are analyzed. Furthermore, this study compares the approaches used by the multinational company in its EE programs implemented in the Portuguese and the Brazilian markets. Data collected from interviews are submitted to comparisons, using the grounded theory. The perspectives of competing companies with similar programs, and other stakeholders are included in the analysis. The research seeks for a substantive theory emerged from the data suitable for the analyzed context. The findings of this predominantly qualitative study suggest that the corporate social marketing approach contributes to achieving the goals of energy efficiency programs, while adding corporate gains to the companies, such as positive corporate image, business strategy improvement and stakeholders' engagement. Links between international climate public policy goals, specific governmental EE programs goals, and companies' behavioral change programs are presented.

Keywords: Corporate Social Marketing, Behavioral Change, Energy Efficiency, Non-state-owned Companies

JEL Classification: M39, M31

1. INTRODUCTION

Behavioral change programs that aim to benefit society and the environment have been a practice, in the recent past, attributed to nonprofit organizations for which social marketing is an already recognized discipline (Bloom, Hussein and Szykman 1995). Non-government organizations (NGOs) and governments carry on supporting behavioral change programs, such as energy saving programs, aligning these programs with the country's public policies, such as energy efficiency and climate policy goals (Cismaru, Ono and Nelson., 2011; Gynther, Mikkonen and Smits, 2012). Nevertheless, non-state-owned companies trading electricity to the residential consumer have also been contributing to meeting energy efficiency (EE) policies' objectives by performing EE behavioral change programs, even if these programs aimed to accomplish less consumption of their main selling product – electricity. This is the case of EDP (Energias de Portugal, S.A), a company established in Portugal which is the largest generator, distributor and supplier of electricity in this country, and operating

worldwide in countries such as Brazil, where it has electricity distribution, generation and supply activities. The EDP group follows specific EE policies, since government's regulations differ according to each country's greenhouse gases (GHG) reduction responsibilities (specifically the GHG emissions from the electricity sector) in agreement with the Kyoto Protocol.

Electricity consumption per capita in Portugal is about two times higher than in Brazil (IEA- International Energy Agency, 2009a, 2009b; World Bank, 2015), as is the domestic electricity consumption per capita (World Energy Council, 2015). According to the Portuguese Environment Agency (APA-Portuguese acronym) (2014), most emissions come from the energy and transport sectors. The Portuguese Regulator of Energy Services (ERSE-Portuguese acronym) (2011) stated that the electricity sector contributed approximately 28% of CO₂ to the total Portuguese emissions in 2007. Conversely, the electricity generation sector in Brazil contributes little to the total GHG Brazilian emissions, since the country's energy matrix contains mostly clean sources (EPE – Empresa de Pesquisa Energética, 2012). The electricity sector contributes about 1.2% to Brazil's total emissions (Instituto Acende Brasil, 2012), while 75% of Brazilian emissions come from deforestation and land use (GreenPeace, 2015).

The Kyoto Protocol is an international document associated to the United Nations Framework Convention on Climate Change (UNFCCC) that aims to reduce GHG emissions. In fact, researchers link the increase of GHG to global warming, the developed countries being identified as those mainly responsible for high levels of GHG. Thus, developed and developing countries are bidding to reduce their emissions at different levels. After a first commitment period ended in 2012, the Conference of the Parties (COP) are now calling nations around the world to negotiations for the 2015 agreement, to enter into force in 2020 (UNFCCC, 2014d; UNFCCC, 2015). According to the Intergovernmental Panel on Climate Change (IPCC, 2014), global warming should be limited to 2° C above pre-industrial levels. Observed impacts of climate change have been suggested as already affecting agriculture, human health, ecosystems, water supplies and some people's livelihoods. Hence, as a complex problem that affects various domains, answers are being sought by coming from all disciplines and fields of research and development (UNFCCC, 2014a).

Against this background, this research aims to analyze how the corporate social marketing (CSM) framework is being used in EE behavioral change programs in Portugal and Brazil, which are classed by the Kyoto Protocol as developed and developing countries, respectively. In order to understand the motivations of non-state-owned groups that trade electricity to the residential consumer in implementing EE programs, and to compare the approaches used in Portugal and Brazil, the following research questions are addressed: i) Why are non-state-owned groups (that sell electricity to residential consumers) interested in performing EE programs focused on behavioral change, even when these programs encourage reducing consumption of the companies' principal product?; and ii) Are EE programs focusing on behavioral change promoted by non-state-owned groups designed and implemented by following a CSM approach?

In order to achieve the proposed research goals, this study explores the EE programs conducted by the multinational company EDP in Portugal and Brazil. The project "A Tua Energia" (*Your energy*), targeted at schoolchildren, was developed in Portugal, while the Brazilian's analogous EE program named "Boa Energia nas Escolas" (*Good energy in schools*) is targeted at schoolchildren and youth. The EDP's approach to both EE programs will be submitted to comparisons, since these programs are developed and implemented by the EDP as a group following a process of adaption to the legislation of each country, considering that these countries have "common but differentiated responsibilities" regarding climate change (UNFCCC, 2014d). Similarly, EE programs implemented by competing companies, under

the same energy efficiency policies, will also be addressed considering data from 2012. Thus, this research considers the perspectives of participants from EDP, in Portugal and in Brazil, EDP's competitors that have implemented similar EE programs, and other stakeholders. The grounded theory will be used, seeking a substantive theory grounded on the data, suitable for the analyzed context. The originality of the research is based on the analysis of the motivations underpinning the EE programs implemented by non-state-owned companies and the contribution it makes towards understanding to what extent social marketing instruments are being used to achieve behavioral change by these programs, which aim at benefiting both society and the company. Additionally, by addressing two programs with similar aims in both a developed and developing country it is possible to explore how public policies are influencing their development.

2. THEORETICAL FRAMEWORK

2.1 Corporate social marketing and the environment

The classic article 'Social Marketing: An Approach to Planned Social Change' by Kotler and Zaltman (1971) defines social marketing as a discipline and since that time its approach and definition have been discussed (Andreasen, 1994; Dann, 2010). A common line of thought is that the social marketing framework aims to achieve behavior change and that it should go beyond providing information by using all marketing instruments. Kotler (1975) grouped social changes according to their extent and stated that a social marketing program can reach different hierarchical levels: 1) cognitive change; 2) action change; 3) behavior change; and 4) value change. In addition to the social marketing approach, Kotler and Roberto (1989) report different strategies to implement social changes that ideally should work together in optimizing results, namely: technological strategy, which consists of modification, replacement or product innovation; legal-political strategy, which derives from laws; and educational strategy, which is achieved through education. Nevertheless, Andreasen (1994) affirms that the volunteer aspect of accepting behavior change should be the central goal in the social marketing approach, by meeting the needs and the profile of the target audience (Takahashi, 2009), and following all the stages of the mainstream marketing plan, including the monitoring and evaluation phase (Kotler *et al.*, 2012).

Despite there being less social marketing research on the environment than on the health sector, an increase in the use of social marketing in this area can be expected since environmental awareness is growing (Bowerman and Delorme, 2015; Takahashi, 2009). Furthermore, society is pressuring organizations to implement more sustainable behaviors, particularly with respect to the use of natural resources and energy (Lowe, Lynch and Lowe, 2015; Schultz *et al.*, 2015). Takahashi (2009) identifies various articles of social marketing applied to environmental interventions and claims that literature is dispersed and scarce. The researcher also identifies that of a total of 62 scientific articles, recycling is the most studied issue (18%) followed by energy conservation (8%). In this context, Kotler (2011) points out that "companies will need to add an environmental dimension to their profile" (p.133). In order to make consumers and stakeholders aware of the companies' environmental actions it is not only necessary to disseminate them, but also to involve stakeholders in a common goal: the quality of life for the present and future generations, provided by a clean environment. The company is now expected to take on an added responsibility, i.e. to be not only societal but also social (Kotler, 2011).

Studies have suggested that behavior change can lead to energy savings of about 20%. In particular, the BEHAVE Project, supported by the European Commission, evaluated 41 programs from a prestructured template of 100 energy behavioral change programs

and concluded that the social marketing framework, including synergies with the private sector, can contribute to programs' effectiveness (Gynther *et al.*, 2012). For that reason it is recommended that social marketing programs must be long running in order to accomplish the desired social change (Andreasen, 1994; Bloom *et al.*, 1995).

Amongst other social responsibility practices – including community volunteering, philanthropy and cause-related marketing – social marketing is distinguished by its ability to comprehensively benefit society by making a measurable impact on a social issue, through behavioral change (Kotler and Lee, 2005). Considering that behavioral changes are needed in order to benefit society, apart from public and nonprofit organizations, consumers are also pressuring for-profit business to behave as citizens, which results in them carrying out social marketing activities. In this sense, corporate social marketing can be approached as the activity that “uses business resources to develop and/or implement a behavior change campaign intended to improve public health, safety, the environment, or community well-being” (Kotler, Hessekiel and Lee, 2012: 111).

While social marketing programs are implemented mainly by nonprofit organizations, focusing on voluntary behavioral change that benefits society rather than the marketer (Andreasen, 1994), CSM has the additional purpose of facilitating market development, increasing sales or improving corporate image (Bhattacharya *et al.*, 2005; Bloom, *et al.* 1995; Kotler and Lee, 2005). In order to optimize benefits, CSM behavior change programs should be connected with what the company stands for, to their products or services (Bloom *et al.*, 1995; Inoue and Kent, 2014; Kotler and Lee, 2005). Partnerships between corporations and nonprofit organizations can be favorable for both parties, and society can also benefit from them, since nonprofits have experience on social issues and companies have marketing know-how, which, together, can improve CSM programs. Nevertheless, it is crucial to guarantee certain aspects, such as a long-term commitment from the corporation, since changing behaviors is a long-time process (Bloom *et al.*, 1995). Kotler and Lee (2005) point out that some companies do not understand the aims of CSM, which impedes the correct implementation of programs designed to accomplish behavior change or sometimes companies are implementing CSM programs and calling it something else.

2.2 Energy efficiency programs in Portugal and Brazil

“The Kyoto Protocol legally binds developed countries to emission reduction targets” (UNFCCC, 2014a., para.2), and Europe recognizes energy efficiency as a method of competitiveness and energy independency by which Europeans can lower their energy bills while protecting the environment, thus undertaking to save 20% of annual primary energy consumption until 2020 (European Commission, 2015). To meet European Union EE policies, Portugal developed the EE governmental program “Efficiency Portugal 2015”, the Portuguese Regulator of Energy Services (ERSE) being responsible for encouraging the implementation of EE programs on the electricity demand side. Through the Program to Promote Efficiency in Consumption (PPEC – Portuguese acronym), ERSE accepts applications of tangible and intangible efficiency measures in electricity consumption and supports those selected through a competitive contest (Diário da República, 2^a série – N^o107, de Junho de 2008; ERSE, 2010). Tangible measures refer to technology such as efficient lighting measures, including, for example, public street lighting and consumption management systems, while intangible measure comprise information and behavioral change projects. Energy companies can apply with EE programs designed by themselves, which means that they have no obligation to adhere to PPEC, as long as PPEC is a voluntary instrument of funding with approximately 23 million euros available (ERSE, 2010).

The ERSE (through PPEC) funds selected intangible EE programs by up to 100%, which is the case in the initiative designed by the EDP company “*A Tua Energia*,” whose aim is

for the “... child population to acquire energy-efficient habits, this measure also intended for these habits to be transmitted to their peer groups, age peers and family” (ERSE, 2010: 49). In 2012, the truck used in “*A Tua Energia*” performed 26 action days in 15 districts and 128 classes to students of 151 schools, totaling 4904 students (EDP, 2012c). The program has two more platforms beyond the itinerant one (the truck “*A Tua Energia*”): a *microsite* where contents such as news and interactive games are placed (EDP, 2011b) and the EDP Sustainability Area in Lisbon. The latter is related to renewable and non-renewable energies issues and is not financed by ERSE (Saraiva, 2012).

As a developing country, Brazil is listed on the Kyoto Protocol Non-Annex I and according to this is not bound to reduce GHG emissions (UNFCCC, 2014b; UNFCCC, 2014c). Although these countries do not have mandatory targets, they need to help in achieving the international objectives (United Nations, 1998). Brazil is committed to reducing GHG through their Nacional Energy Efficiency Program, from which originates the Energy Efficiency Program to Electricity (PEE – Brazilian acronym). The National Electric Energy Agency (ANEEL – Brazilian acronym) manages the PEE, which mandatorily requires that electric companies apply a minimum percentage of their operating revenue to EE programs in order to fulfil the PEE’s guidelines. Firstly, the PEE defines the types of EE programs to implement and then each company designs and manages their own program. Amongst the varieties of EE programs that the energy companies can choose to implement – such as the ones that aim for the replacement of inefficient equipment or the energy efficiency projects in industrial or commercial places – the educational behavioral change projects are preferably to be implemented using the PROCEL methodology (ANEEL, 2008). The PROCEL (Brazilian acronym – National Program of Energy Conservation) is another EE governmental program under the responsibility of Eletrobras (a power company controlled by the government), which in turn includes PROCEL in schools, and which aims to apply the same methodology to all the companies’ EE educational behavioral change programs. This process allows to monitor the results, which emphasizes the role of PROCEL through the years (Eletrobras, 2005):

“When you use electricity efficiently, there are more savings and less waste. Saved energy can be used by another consumer, reducing or eliminating the need to build new power plants and system expansion. This procedure is called “building virtual power plants.” “Virtual power plants” postpone the construction of “real power plants,”; reduce costs and waste, eliminate environmental impacts, increase efficiency and, above all, the procedure reflects, for users of electricity, attitudes of responsibility and citizenship.” (Eletrobras, 2005, p.11)

Similarly to the Portuguese EDP program “*A Tua Energia*,” the EDP in Brazil also implements an EE program – Boa “*Energia nas Escolas*” – which is carried out in 277 public schools located in EDP’s Bandeirante and EDP Escelsa areas. The project reaches 140,000 students and aims to make changes or introduce the acquisition of positive habits related to electricity conservation (EDP, 2011a; EDP, 2012a).

3. METHOD

A mainly qualitative research with an interpretivist approach was followed, designed through a case study and using the grounded theory to analyze the data. Grounded theory sought to emerge a substantive theory from the data, suitable for the context analyzed (non-state-owned groups’ guidance on EE programs), providing generalization to similar cases (Glaser and Strauss, 1967; Martins, 2008; Tarozzi, 2011). In the present study, grounded theory was solely used at the analytical level, however, it was considered important to follow it with

a sampling method – theoretical sampling – in the sense that it is closely connected to the theory-building process (Tarozzi, 2011). Accordingly, research began with exploring Portugal's EDP EE program "*A Tua Energia*" and from this new participants were included. In the first phase of the research, four informal interviews were conducted where respondents could express themselves freely, as the objective was to explore their opinions. Through informal interviews conducted with EDP, indicators about guidance were obtained, which underpin the implementation of these programs. Interviewees referred to political-legal, economic, social and environmental factors connection with the EE programs. The field observation of the program *A Tua Energia* and the analysis of documentary sources complemented data obtained through informal interviews. Consequently, this initial data led the search to other relevant sources, considered essential to answering the research questions. Thus, as new concepts emerged, new participants and documental sources were included (Gil, 2009).

Since a representative of EDP (2012) stated in an exploratory interview that "energy efficiency projects are always defined and implemented by EDP as a group," this aspect led us to extend the research to EDP's EE analogous program, targeted at schoolchildren and youth in another EDP market. From all the EDP markets Brazil was chosen. On the one hand, this decision was based on its historical link to Portugal, and on the other hand, on the fact that Brazil is considered a developing country and Portugal a developed country; the latter being an important factor in understanding whether EDP's guidance toward the same socially desired behavior is maintained in different scenarios. Guidance is used in this research as being synonymous with companies' motivation to implement behavioral change programs and the approach followed. In Brazil "*Boa Energia nas Escolas*" was the EDP's program identified for analysis. Subsequently, EDP's non-state-owned competitor companies' guidance was also explored, considering comparable EE behavioral change programs, which were implemented both under the same conditions and in the same country. In Brazil, five companies with the mentioned features were available to participate in the research (AES Eletropaulo, CPFL, Iberdrola (through Elektro); RME (through Light) and Rede Energia). In Portugal, only the company GALP was selected, since it was the only holding implementing an EE behavioral change program that was comparable to that of the EDP. In-depth interviews were conducted with a representative department of each holding, during the year 2012.

In the second phase of the research, 14 in-depth interviews were conducted. Although the questions and their sequence were prearranged, respondents could answer without restrictions (Gil, 2009). These interviews were designed to establish a comparative basis for the time of data analysis. All participants were selected by theoretical sampling, through interviews. In Portugal, two open interviews were addressed to the EDP, three with teachers participating in the program, two with partners of EDP (ERSE, which is also the regulator of electricity in Portugal, and QUERCUS), and one with GALP, which was the identified competing company for the Portuguese program. In Brazil, one in-depth interview was performed with a representative of EDP and five in-depth interviews were administered to the identified competing companies in this country that had agreed to participate in the study. Documentary sources consultation (physical and online) and observation supported the construction of the interviews and complemented them in order to perform a triangulation of the information. These additional documents accessed during the research can be classified as following: business sustainability reports; studies on energy and energy efficiency; government plans for energy efficiency; business and state balance of energy efficiency programs; articles published in thematic magazines and newspapers; press releases; energy efficiency program Internet sites; institutional and corporate sites containing government documents and energy efficiency statistics.

The collection was finalized when more information from the data was no longer emerging, reaching theoretical saturation (Dey, 1999). Data from the 14 in-depth interviews were coded, categorized and compared as they were collected in order to extract regularities. This analysis was assisted by the scientific program Atlas Ti. Categories were created based on the data and not on pre-existing analysis criteria. The theory that emerged from the data was also analyzed looking at the conformity with CSM literature theory and documental sources. In the initial coding (first coding stage) data was encoded using participants' words, whenever possible, and following the "*in vivo* coding" (Tarozzi, 2011). As initial codes were created the data were grounded, which indicated that meaning was found in the data. The number of times that a code is grounded in the data is given by the left-hand digit within curly brackets (see table 1). With respect to the focalized coding (second coding stage), logical links between codes were identified, i.e. density (Strauss and Corbin, 1990), followed by the process of integration by similarity in broader categories (Tarozzi, 2011). Density, i.e. the number of logical connections, is represented by the right-hand digit within curly brackets. The final names attributed to the codes, initially labeled provisionally, were then ascribed. In the third coding stage (theoretical coding), the aim was to reach the core category that organized the set of smaller categories and contained the grounded theory.

4. FINDINGS

As observation and documental research revealed, "*A Tua Energia*" was a short program underpinned by a framework that did not incorporate an instrument to effectively measure behavioral change. "*A Tua Energia*" conveyed persuasive messages that encouraged the target to perform the action (save energy), through attractive materials, e.g. a jingle, brochures, interactive games. The program platforms (e.g. the truck, the site, area dedicated to sustainability) were part of the campaign *in loco*, however they were not designed to accompany the process of behavioral change after these initiatives had taken place, and additional data were not available to attest to behavior change. As a result, the entity that regulates the electricity sector in Portugal (ERSE), which attested to be an EDP's program partner not only in "*A Tua Energia*," stated in the interview (P5) that "...intangible measures are information and dissemination measures that, although they do not have measurable direct impacts are inducers of more rational behavior by enabling more informed decision-making regarding more efficient adoption of solutions in the consumption of energy ..."

Other EDP Portugal stakeholders, such as the teachers and the partners (QUERCUS, ERSE) considered that electricity companies should position themselves as behavior change agents. Teachers who accompanied children indicated that it was difficult to know whether children would acquire the right energy use habits, considering the short time period of the program. Nevertheless, the teachers reported that "[*A Tua Energia*]" brought an opportunity to reflect on some bad habits that we all have, adults and children, without being aware of how much they cost us at the end of each month" (P3).

With regard to the analyzed Brazil EE programs (from EDP and competing companies), they were designed to effectively achieve quantifiable energy saving results as was required by the National Electric Energy Agency (ANEEL). As recommended by ANEEL, both the EDP and competing companies followed the PROCEL methodology, which is aimed at calculating savings, through a mechanism powered by the companies and the government. During the project "*Boa Energia nas Escolas*" (EDP Brazil), students received training on EE at their schools and in the program platforms (e.g. truck), the students' homes being the places where the program effects were measured, through monitoring reports. This activity was guided by teachers and combined with other activities embraced by the school during the school year.

Apart from the itinerant platform for workshops and experiments, the creative strategy of the project incorporated brochures, games, and stickers as communication instruments (EDP, 2012a; 2012b). Books for teachers and students at different levels, teaching resources, an educational game, video films, and an evaluation and monitoring process were also contemplated in this methodology recommended by PROCEL. In the period 1990–2004, PROCEL achieved total savings of 1.166.862 MWh, for a total of 13,891,224 students. In this period, each student could save 84 kWh per year (Eletrobras, 2005). In the first 10 years, PROCEL reached 16,000 schools, 120,000 teachers, 13 million students and the annual electricity production of Itaipu was reduced by 4%, which is equivalent to 6% of the Tucuruí plant's annual production (the largest Brazilian power plant) (Eletrobras, 2011).

Table 1 presents examples of citations for the final codes resulting from the interviews' analysis. The initial codes passed through a final designation process and were synthesized. There were 96 initial codes that emerged from the 14 analyzed interviews, grounded in 167 citations, which resulted in 28 final codes.

Table 1. Final codes resulting from the global analysis

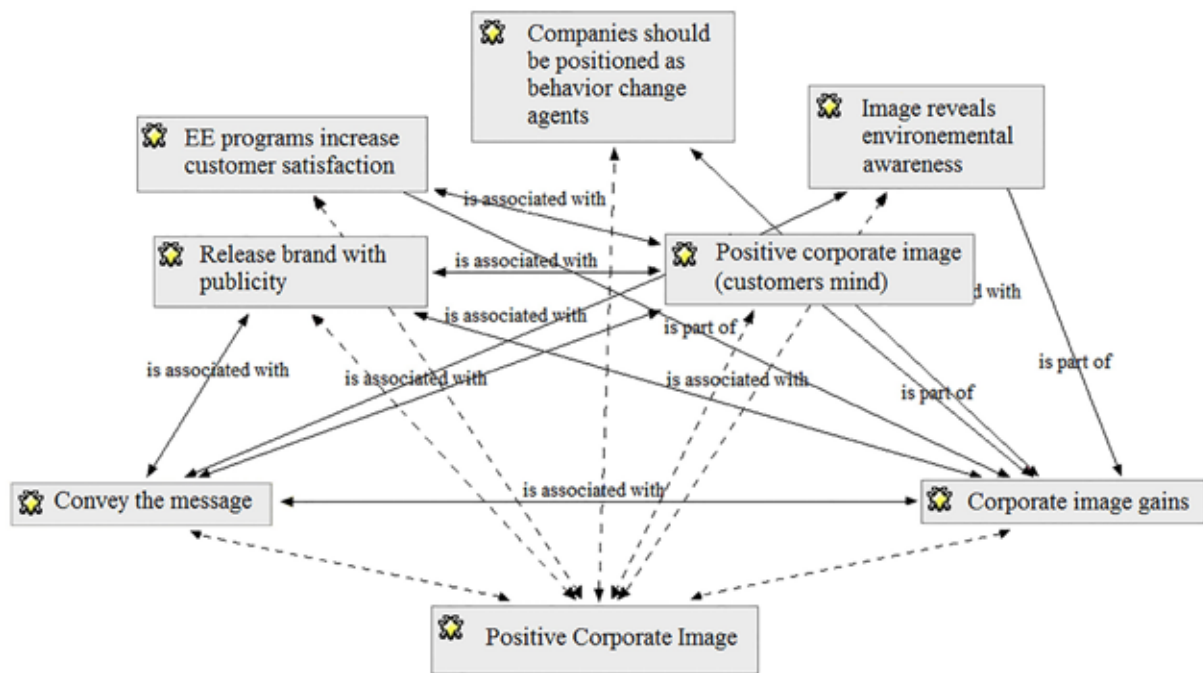
Final codes	Examples of citations
Code: Company intends to deal with EE as a social product {6-2}	"... like any other project, a mandatory phase is the measurement and results verification..." (P9) "Because we believe that this is the best way of working. More so when the project is coordinated by the Marketing Department." (P8)
Code: Postpone investment in the system {5-5}	"Contrary to what might be thought, electric companies do not generate necessarily more profits selling more electricity, but through a balanced demand management where regulation at national level is very relevant..." (P4)
Code: Children are the future {2-2}	"...they are the future." (P8)
Code: Children are the future customers {3-2}	"Of course, not forgetting that they are our future customers." (P7)
Code: Companies should be positioned as behavior change agents {11-6}	"Obviously, because being themselves generators of 'environmental conflicts,' they will be per se responsible and blamed for damage they did and will do, moreover, companies take benefits from their own [EE] measures." (P1)
Code: Partnerships are important {5-1}	"QUERCUS has had partnerships with electricity supply companies for this this type of project development. For us these partnerships are seen as an asset in changing behavior, non-governmental organizations promotion is fundamental because in general they have a lot more credibility to the population than companies themselves. Moreover, it appears that technical measures have less and less weight or at least can only be properly enhanced when associated with behavioral changes." (P4)
Code: Release brand with publicity {1-3}	"Brand awareness with spontaneous media." (P10)
Code: Financial resources savings {5-5}	"Environmental preservation and natural resource economics will result in a saving of financial resources." (P2)
Code: EE for better electrical system management and supply security {7-4}	"... the aim is to avoid waste along the production and distribution electricity chain, only consuming strictly necessary quantities of energy." (P7)
Code: Strengthen relationships with customers {2-3}	"Better relations with communities and customers." (P11)
Code: Connection facilities with stakeholders {2-6}	"Connection facilities with stakeholders." (P10)
Code: Image gains {3-14}	"Joining the PPEC program allows reducing consumption by increasing energy efficiency but also allows suppliers to obtain image benefits, either by transmitting an environmental awareness image or concerning potential consumer clients welfare, to the market trying to capture" (P5)
Code: Generate value to shareholders {1-3}	"Generate value for shareholders." (P10)

Code: Positive corporate image (customers' minds) {1-4}	"The release of these actions has a positive role on company image perceived by their customers." (P12)
Code: Image reveals environmental awareness {3-2}	"...either by transmitting an environmental awareness image." (P5)
Code: Improving the load factor of the utilities {1-3}	"...improving the load factor of the utilities." (P9)
Code: Behavioral change is possible through these programs {2-1}	"Encourages changes in habits and in consumption to rational use of energy." (P11)
Code: Marketing in the company is applied to actions designed to acquire efficient habits {3-1}	"Marketing inside the company aims to insert energy efficiency in the design of educational activities for teachers and students, so that they think and act in a coherent and unique way to promote energy conservation and environmental preservation. The goal is to apply the knowledge so that action can be taken aimed at acquiring new efficient habits for a better quality of life." (P14)
Code: EE programs increase customer satisfaction {1-3}	"increase customer satisfaction." (P9)
Code: EE programs need time to bring results {4-1}	"Energy efficiency programs will surely bring results in the medium to long term." (P4)
Code: EE programs transform energy market and develop technology {5-2}	"It is expected that these companies, traditionally sellers of 'kWh' will start to sell energy services in the future." (P5) "The energy efficiency program developed by Light aims to contribute to the electricity market transformation, encouraging the development of new technologies." (P11)
Code: Convey the message {6-4}	"Intangible measures are information and dissemination measures that, although they do not have measurable direct impacts, are inducers of more rational behavior by enabling more informed decision-making regarding a more efficient adoption of solutions in the consumption of energy ..." (P5)
Code: Concern about resources sustainability {8-4}	"We believe that this is the best opportunity that the power sector has to practice sustainable development practically, in the search of the balance of social, environmental and economic aspects and impacts." (P13)
Code: Recognition amongst stakeholders {1-7}	"Acknowledgment by communities and customers." (P10)
Code: Reduction of customers' bills {1-3}	"Provide electricity cost reductions to the customer." (P12)
Code: Environmental responsibility {3-4}	"When talking about companies that cause any environmental / social impact, in poor communities, for example, this concern needs to be further focused ..." (P9)
Code: Responsibility towards stakeholders {7-4}	"...over the years EDP has developed a number of initiatives that are a clear demonstration of the company's commitment and ability to offer products and services that meet their customers and the community's wishes, as a very precise focus on behavior change." (P7)
Code: CSR {3-5}	"On the other hand, a bet on a rational consumption is part of the production and distribution power companies' environmental and corporate social responsibility, where through the population's behavior waste can be reduced, ensuring they have income for a sustainable consumption and so also ensuring a better electrical system management and greater security of supply." (P4)

Source: Interviews – teachers: P1–P3; QUERCUS: P4; ERSE: P5; EDP Portugal: P6–P7; GALP: P8; EDP Brazil: P9; competitors CPFL, LIGHT, REDE ENERGIA, AES and ELEKTRO (IBERDROLA): P10– P14.

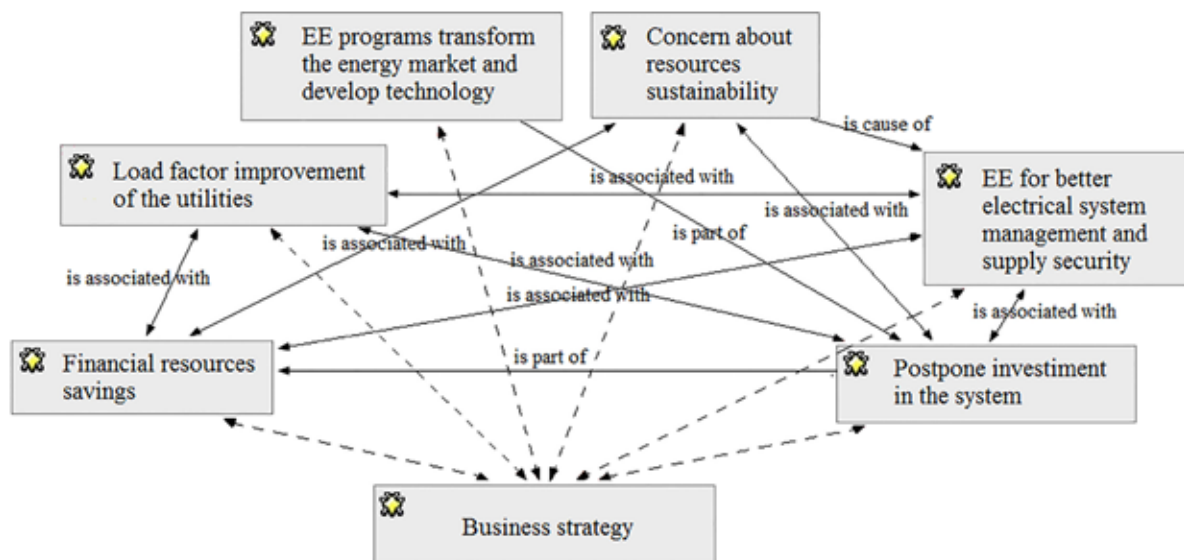
With regard to the first research question “Why are non-state-owned groups (that sell electricity to residential consumers) interested in performing EE programs focused on behavioral change, even when these programs emphasize its principal product consumption reducing?,” three main categories emerged from the analysis: “positive corporate image” (Figure 1); “business strategy” (Figure 2); and “stakeholder engagement” (Figure 3), which are the main companies’ motivations for implementing EE programs.

Figure 1. Positive Corporate Image



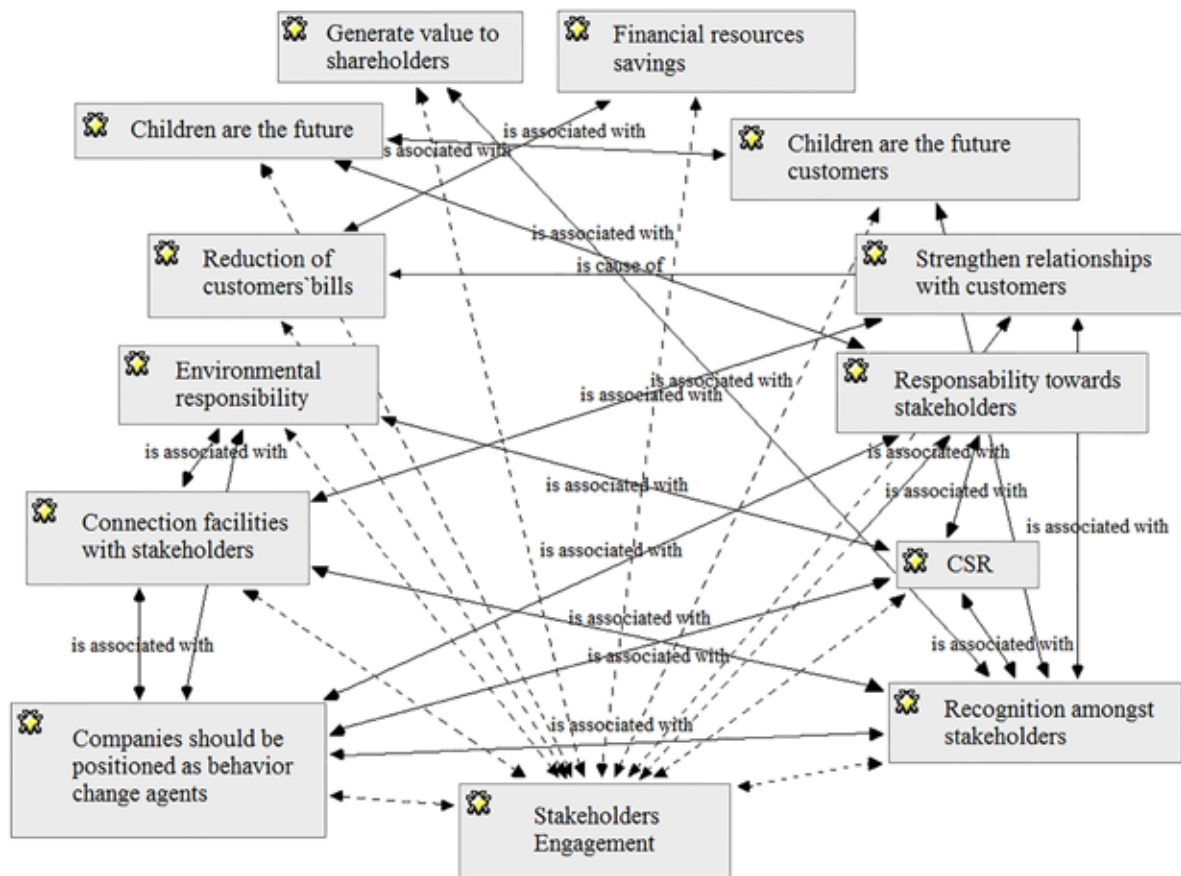
Source: Author/Adapted from Atlas ti output

Figure 2. Business Strategy



Source: Author/Adapted from Atlas ti output

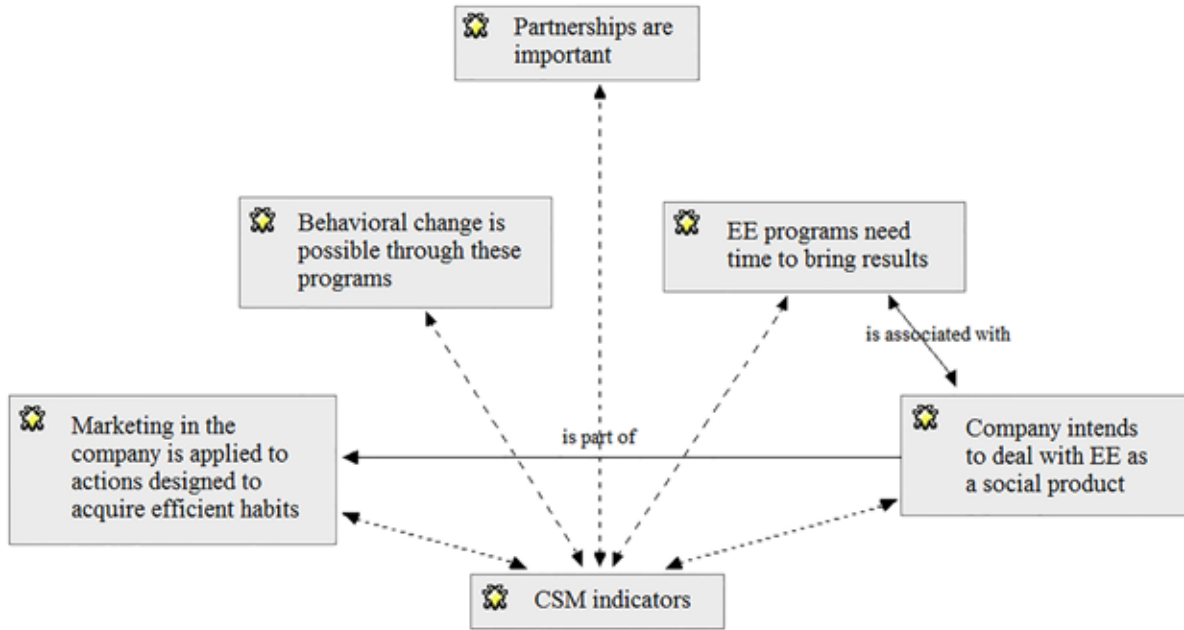
Figure 3. Stakeholder Engagement



Source: Author/Adapted from Atlas ti output

In order to answer the second research question “Are EE programs focusing on behavioral change promoted by non-state-owned groups designed and implemented following a CSM approach?,” explanatory categories are depicted in figure 4. Category ‘CSM indicators’ include codes resulting from the global analysis that point out the features of the CSM approach underlying the design and implementation of these programs.

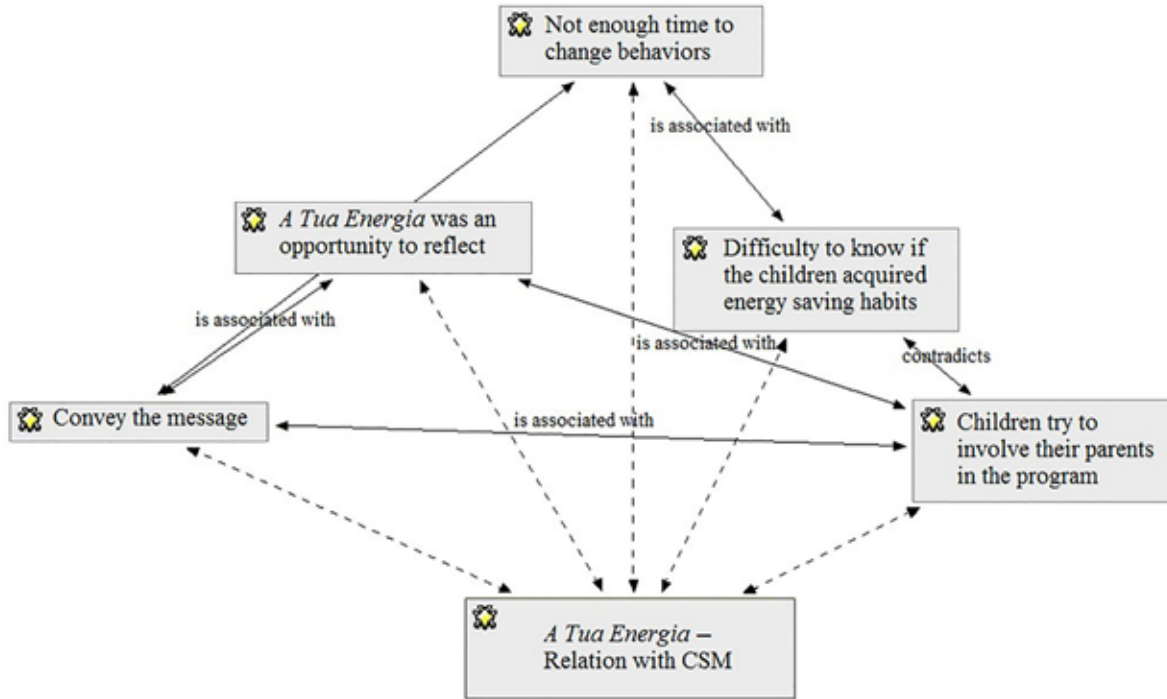
Figure 4. Category 'CSM indicators'



Source: Author/Adapted from Atlas ti output

Although corporate motivations to implement these programs are common, as represented above in the figures 1, 2 and 3, the disciplinary approach followed in conducting their EE programs differ fundamentally when comparing the Portuguese and the Brazilian markets. The CSM instrument was identified in the analyzed programs from the two different markets. However, the EDP Portugal's program "*A Tua Energia*" was the one revealing fewer CSM indicators (Figure 5). Although the program "*A Tua Energia*" aimed at behavioral change, the company approach is more focused on a communication campaign, not including a phase of evaluation that effectively measures behavior change. Additionally, data from the interviews, documental research and observation also confirmed that the "*A Tua Energia*" framework did not allow the effective quantifying of electricity savings.

Figure 5. “A Tua Energia” – Relation with CSM



Source: Author/Adapted from Atlas ti output

5. DISCUSSION AND CONCLUSION

This research aimed to understand how the CSM framework is being used in EE behavioral change programs in Portugal and Brazil, which are considered by the Kyoto Protocol as developed and developing countries, respectively. In order to understand the motivations of non-state-owned groups that trade electricity to the residential consumer in developing EE programs, and to compare the approaches used in these different countries, this study explores the EE programs implemented by the multinational company EDP in the Portuguese and the Brazilian markets. The perspectives of competing companies with similar programs and of other stakeholders were included in the analysis.

Data collected from in-depth interviews were submitted to comparisons, using the grounded theory. According to the more representative emerged data, i.e. the codes with more grounding and density, the companies' motivational phenomenon to implement EE programs focusing on behavioral change were depicted. “Positive corporate image,” “business strategy,” and “stakeholder engagement” are suggested as strategic corporate aspects, which are the basis of the non-state-owned groups' motivation to implement behavioral change programs. Thus, the interconnection of these three categories allowed the identification of a core category named “corporate gains” – a key concept from which the substantive theory emerged. By defragmenting the core category corporate gains it is worth noting that, hierarchically, electric companies primarily develop their business strategy and then plan their corporate image management in order to achieve the images that the company desires to produce in the stakeholders' mind. Consequently, the category “positive corporate image” has a dynamic connection with the category “stakeholder engagement.”

In Portugal, EDP did not apply entirely the CSM framework to its program, since it was conducted as a short campaign, mostly focused on communication aspects. Conversely, in Brazil, EDP applied all the CSM tools and the entire program was based on the approach of the discipline. The Brazilian EE program used the techniques and knowledge of marketing

to focus on the social product – EE – and effectively measured behavior change. Two reasons to explain this finding are as follows: the PEE (Energy Efficiency Brazilian Plan) has specific policies that meet the CSM approach that companies should follow, and it is mandatorily required that electric companies assign a minimum percentage of their operating revenue to EE programs in order to fulfil the PEE's goals. This requisite is not verified in the Portuguese regulator entity's EE policies, in which EE programs are not mandatory and can be funded at 100%, and therefore the level of participation is less strongly demanded by the regulatory entities than in Brazil.

With regard to the apparent contradiction related to the idea of for-profit companies encouraging the reduction of consumption of their main selling product, the environmentalist non-government organization and partner of the EDP in EE programs, QUERCUS (P4), emphasized that:

“contrary to what might be thought, electric companies do not generate necessarily more profits at the expense of selling more electricity, but through a balanced demand management where national scale regulation is very relevant. If at peak times there is a greater efficiency in consumption, the electric system load factor is improved and this avoids system expansion only to meet demand generated by waste,” and that could be attested through the category labeled as “business strategy.” (Figure 2)

Additionally, in the same category the market transformation concept emerged, namely electricity market transformation, which means that the market is more open to more efficient electronics equipment production, new EE services through audits made by electric utilities, etc.

As represented in the “stakeholders engagement” category, the most visible benefit that behavioral change brought to consumers was the reduction in electricity bills. Programs covered in this study focused on children and youth, considering also peer educators, which encourage changes in energy saving with respect to companies' future customers. From the society and environmental perspective there were also benefits from these programs' implementation, which are particularly clear in Brazil where energy savings were quantified and for this reason corporate image was positively affected.

With respect to external factors linked to these programs, apart from the economic, social aspects, environmental and political-legal issues are highlighted. Climate change and energy shortages are international issues for which desired social changes are requested. Companies that implement these projects meet their social responsibility (responsibility for the environment) working their image and communicating with stakeholders (stakeholders engagement), such as environmentalists non-government organizations (e.g. QUERCUS), communities, and customers. For each country, these projects are adapted, meeting specific political and legal guidelines.

While these findings are in line with the CSM literature, they should only be generalized to assimilated contexts. However, these finding contribute to the CSM literature on environment issues by depicting the motivations of for-profit companies selling electricity to residential consumers in implementing EE programs. The identified corporate gains are related to the stakeholders' engagement focused on social responsible management leading to a positive corporate image. The construction of brand goodwill through associations conveying environmental responsibility is therefore consolidated in stakeholders' minds. Regarding financial aspects, research has revealed that CSM is applied as a business strategy. While contributing to transforming markets, it enables the postponement of investments in the electrical distribution system since the electricity stock can be better managed through this strategy.

With regard to the disciplinary approach applied to design the analyzed programs, it can be concluded that the program “*A Tua Energia*” does not follow entirely the CSM instrument,

being a short-lifespan campaign encouraging behavior change regarding EE. Indeed, the literature addresses these efforts in clarifying that social marketing goes beyond marketing communication campaigns (Andreasen, 1994; Kotler and Lee, 2012; Kotler and Roberto, 1989), whether considering nonprofit or for-profit organizations (Kotler *et al.* 2012). Although the Portuguese program focuses on a campaign that seems to achieve cognitive change (Saraiva, 2012), a behavioral change marketing communication campaign per se does not classify as a CSM project. In fact, this program lacks other CSM components such as behavioral change monitoring and evaluation. Although promotion can both enable more informed decision-making with regard to more efficient solutions in energy consumption and bring some corporate gains to companies, it seems that it does not accomplish the same benefits when compared with a full CSM framework integration in an EE program.

Conversely, in Brazil the EDP and their competitors seem to implement EE programs in accordance with the CSM framework, in synergy with the educational strategy, throughout the school year, to increase the potential of the programs. In this regard, the government in Brazil is seen as a key partner of non-state-owned companies in the development of EE behavioral change programs. In fact, regulatory entities contribute to an integrated methodology, which encourages companies to analyze data throughout the program and quantify energy savings. The partnership between government, companies and schools, is thus consolidating the use of CSM in Brazil. The importance of such partnerships in CSM programs has been recognized by authors like Bloom *et al.* (1995), Kotler *et al.* (2012) and Kotler and Lee (2005). Brazilian programs focus on effective behavioral change, providing enabling tangible and intangible benefits for companies' businesses, while reducing consumers' electricity bills, protecting the environment and contributing to global warming mitigation goals. These findings support the idea that business can invest in positive behavior change and approach CSM not as a contradiction but as a win-win strategy.

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UBICOOOL - FROM THEORY TO PRACTICE

Helena Alves

ABSTRACT

Recruitment and management of volunteers in non-profit organizations is a fundamental activity in increasing these organizations' capacity and one that can benefit considerably from applying marketing principles. However, these organizations are found to have difficulty in applying marketing principles due to the lack of capacity in this professional area. This article aims to draw a parallel between theory and practice based on the literature in this field and the case study of CooLabora in its activity of university volunteerism - UBICool. The case study shows that many of the principles suggested by theory are applied in this specific case, although often informally and unplanned, and so recognizing the positive and less positive factors can contribute to future improvement with benefits for the organization, volunteers and society.

Keywords: Volunteers, Non-profit Organizations, Case Study, Marketing

JEL Classification: M31

1. INTRODUCTION

The non-profit sector is increasingly important in the economy. In a study of the Portuguese non-profit sector compared to that of other countries, Franco et al, (2005) showed that in 2002 the sector had expenditure representing 4.2% of Gross National Product and involved the efforts of a quarter of a million workers.

The non-profit sector is taken to mean non-State organizations whose primary aim is not commerce or profit creation. They are self-governed and people can freely join or support them through volunteerism (González et al, 2002; Andreasen and Kotler, 2008).

Although the importance of strategic marketing thinking for non-profit organizations is recognized academically (Bruce, 1995; Gonzalez, Vijande and Casielles, 2002; Sargeant, Foreman and Liao, 2002; Macedo and Pinho, 2006), there is little consensus as to how to carry it out, since these organizations have the task made more difficult by being directed to various targets (Rothschild, 1979; Pope et al., 2009). On one hand, the actions of non-profit organizations are directed to target publics from whom a change in behaviour is wanted, but simultaneously these organizations need to attract volunteers and funding, and so they have to draw up different marketing strategies according to their target public.

Therefore, one of the main marketing challenges these organizations face is recruiting and holding on to volunteers. This article will focus on that aspect, based on the case study of CooLabora_{CRL} – Consultancy and social intervention cooperative, and the volunteer group UBICool – University Volunteerism. Firstly, the concepts of marketing in the non-profit sector will be approached considering the specificities of this sector. Then the focus will be on the importance of volunteerism for these organizations and the marketing approach to acquiring and retaining volunteers. Next, the case study of CooLabora and the volunteer group of UBICool will be analyzed, attempting to find out how theory and practice come

together and also the possible improvements for a successful partnership for the actors involved and society as a whole.

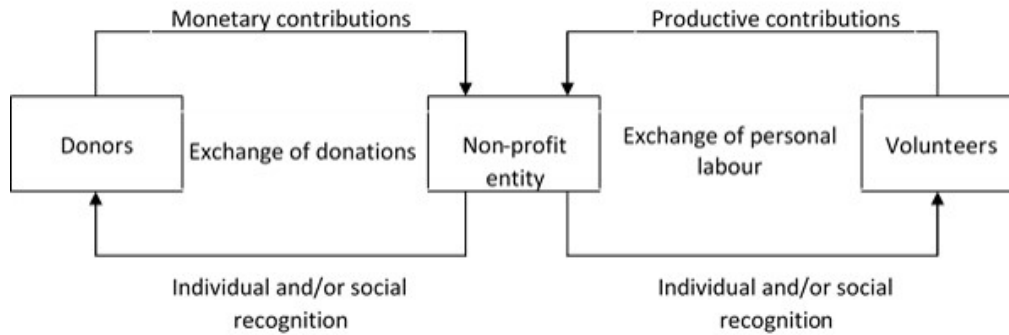
2. NON-PROFIT MARKETING

Various characteristics make marketing in the non-profit sector different from marketing in the for-profit sector. As stated by Rothschild (1979) and Andreasen and Kotler (2008), non-profit organizations “sell” a “product” that is very intangible and difficult to convey through communications, one which is often associated with collective benefits, with it being difficult for the individual to perceive any personal benefit. Another characteristic is the fact that the demand for that “product” is often non-existent. In addition, whereas in the for-profit sector, price is based on monetary cost, in the non-profit sector this does not happen as often this does not even exist. It is therefore non-monetary costs that are considered in the price, but these can be considered costs for some and be considered as benefits by others.

Difficulties in terms of segmentation and the very management of the marketing-mix can be mentioned (Rothschild, 1979; Andreasen and Kotler, 2008). While the segmentation process in the for-profit sector aims to select the most attractive markets, in the non-profit sector this usually has to be directed to the least attractive sectors of a society, for the latter to function correctly as a whole. Moreover, speaking of management of the marketing-mix, it is easily understood that in the non-profit sector these tools cannot easily be altered to accompany customers’ wishes, unlike what happens in the for-profit sector.

Another difference between these two types of organizations derives from the target publics they have to serve. According to Bruce (1995), non-profit institutions have several types of customers. Final customers and intermediate customers (all those who contribute to the institution’s operations, but cannot be seen as principle customers), with direct customers being further divided into beneficiaries, supporters, stakeholders and regulators. And according to Kara, Spillan and DeShields (2004), each of these customers needs a differentiated marketing strategy. For Chías (1995a), in non-profit institutions there are exchange processes parallel and complementary to those carried out with customers, donation exchanges (between the organization and its donors) and labour exchanges (between the organization and its volunteers), as can be observed in Figure 1. The first type of exchange is based on the fact these organizations have donations as their only or partial source of finance, whether they come from sympathizers, patrons, sponsors or others. In turn, the second type of exchange, that of personal labour, derives from the fact that these organizations are totally or partially managed by volunteers. So the marketing of these organizations not only needs to be directed to their beneficiaries, but also to their sources of both capital and labour (Padanyi and Gainer, 2004).

Figure 1– Capital and labour exchanges in the non-profit sector



Source: Adapted from Chías (1995a: 62-63)

Nevertheless, as yet there is little evidence of how marketing strategies are developed and how they should be developed according to these different target publics. If in the private sector, the first and priority target public is the organization's customers because the organization's financial survival depends on them, in the non-profit sector this is not so linear, as the direct beneficiaries of the organization's service are not always those who bring financial resources, and as such it is difficult to predict and prioritize marketing actions (Padanyi and Gainer, 2004).

One of the main problems faced by non-profit organizations is understanding what motivates people to work voluntarily for them, as this variable contributes critically to the creation of capacities in these organizations (Penner, 2002). While employee recruitment lies typically in the sphere of human resource management, the recruitment of volunteers can benefit considerably from marketing considerations (Andreasen and Kotler, 2008). Also in this field there has been considerable development with studies carried out since the 1970s, including those by Tapp and Spanier (1973) and Howarth (1976), but also in the 1980s (see for example, Henderson, 1981 and Philips, 1982), 1990s (see for example, Farrell, Johnsto and Twynam, 1998 and Anderson and Shaw, 1999) and 2000s (see for example, Raman and Pashupati, 2002, Stamer, Lerdall and Guo, 2008). Generally speaking, these studies conclude that the main motivations to work voluntarily are above all altruism, the feeling of belonging, social recognition and personal learning and development. Compiling the different empirical evidence found in the literature, Wymer and Starnes (2001) proposed an explanatory model of volunteers' behaviour based on personal influences such as self-esteem, values and beliefs, the stage in the life-cycle and personal experiences; on interpersonal influences such as having friends/acquaintances who are volunteers, social norms and the influence of parents who are volunteers; on attitudes towards the organization, its mission and its customers; and also on situational factors such as time, geographical distance and the feeling of security versus insecurity in voluntary service.

Andreasen and Kotler (2008) state that the main benefits perceived by volunteers are: gaining career-related experience, enhancing self-esteem, reducing negative feelings, strengthening social relationships, learning more about the world, and expressing important values such as humanitarianism. Then again, the main barriers to becoming a volunteer are a too full personal schedule, being too young, lack of transport, not knowing how to become involved and not having the necessary skills.

By understanding these factors, non-profit institutions could improve their process of recruiting and retaining volunteers, with it being important that marketing strategies tie in with their motivations and expected benefits. However, Chinman and Wandersman (1999) also warn about having to take into consideration volunteers' possible costs and barriers so that these can be tackled in marketing messages.

Wymer and Starnes (2001) claim that at the first stage it is very important to define the profile of volunteers to be recruited, as well as the duties they will perform, so that volunteers with the appropriate skills will be taken on. Furthermore, besides understanding volunteers' motivations, it is also important to have appropriate supervision, information, social support and rewards for voluntary work, to achieve success and keep volunteers motivated. At a later stage it is also important to assess the process.

3. CASE STUDY

3.1 Methodological aspects

To carry out this study, the case study technique was chosen. According to Yin (1989), the case study involves intensive analysis of a relatively small number of situations, and sometimes only one case is studied. Emphasis is given to complete description and understanding of the relationship of factors in each situation, whatever the numbers involved. According to Yin (1989), use of the case study method aims to explore, describe, illustrate and explain different phenomena. Although frequently used together with other research techniques, to complement and connect the subjects of study, it cannot be considered a sub-component of another method. It is therefore a method with its own merits and can be used on its own.

According to Stake (1995), case study strategies can be direct interpretation, whereby through observation the researcher draws some considerations and makes an analysis and direct synthesis of the phenomenon, without any data aggregation; or aggregation of circumstances, through which the researcher in certain cases can feel the need to aggregate the data collected for better understanding of the phenomenon under study. Here, the latter strategy was used, i.e., that of aggregation, considering various sources of secondary and primary information. Therefore, in secondary terms, information was gathered through brochures, web pages and official documents of *CooLabora*, highlighting among them “Coolkit – Games for Non-Violence and Gender Equality” and the questionnaire drawn up by *CooLabora* to understand the motivations of volunteers associated with university volunteerism. In terms of primary sources, a semi-structured interview was held with one of the persons in charge of the initiative. As Stake (1995) claims, the aim of interviews is not to obtain yes or no answers but rather the description of an episode, a link between facts and an explanation. Therefore, one of the main advantages of using interviews is the fact that the questions are open, with no restrictions on the answers, i.e., the study can be of a more exploratory nature. Indeed, one advantage of using the interview is that the interviewee can more easily relate unique experiences and situations gone through, something which is only possible through oral presentation.

Since this is a case study, the aim is not to arrive at any kind of generalization, but rather explore the phenomenon and show how it can be explored in the light of theory.

3.2 CooLabora

According to the information contained on the website of *CooLabora* (*CooLabora*, 2015a) and in its statutes “*CooLabora* is a cooperative of consultancy and social intervention created in 2008 whose mission is to contribute to the development of people, organizations and the territory, through innovative strategies to promote equal opportunities, civic participation, education, training and social inclusion”.

According to its action plan for 2010 (*CooLabora*, 2010), its spheres of intervention are centred on consultancy for public and private entities “aiming to support their organizational development through providing technical support, project conception, strategic development plans and assessment plans” and Social Intervention “so as to contribute to a more united

and cohesive society through implementation of actions to include the most disadvantaged groups”.

Its financial sustainability is ensured by public and private funding and also capital resulting from consultancy services, and part of its services is to provide innovative methodology to elaborate social intervention studies and projects, the preparation of applications to financing programmes, management support, and accompanying and evaluating projects. Its service provision regarding consultancy also extends to organizational development in terms of assembling and developing networks and partnerships, production of reception and procedure manuals, consultancy in quality certification processes and development of organizations’ social responsibility. In the field of training, CooLabora is a training entity accredited by DGERT – Department of Employment and Labour Relations, providing services related to the elaboration of training plans in various fields, such as inter-personal relations, motivation and leadership, group dynamics and teamwork, but also training plans for IPSSs (Social Solidarity Institutions) and social intervention professionals in areas such as strategic planning, and preparing applications, inter-personal relations and conflict management, activities in old people’s homes and day centres, among others. CooLabora also provides services in organizing events and activities, namely seminars, congresses, workshops and entertainment activities in institutions supporting senior citizens.

Its partnerships are very diversified, including both public and private agents, highlighting schools of various levels of education from nursery to university, community councils, local authorities and public services, private companies, local development networks and also several international partnerships.

Its intervention is above all in the following areas:

- Social entrepreneurship, in which initiatives are developed to promote entrepreneurship, such as training for the creation of micro-firms, stimulating entrepreneur networks, projects to promote young entrepreneurship and encouraging Job-Seekers’ Mutual Help Groups (GEPE). Within this area of intervention, responsible, humanitarian consumption is also promoted, through collaborative consumption platforms and exchange fairs using social currency.
- Domestic Violence and Gender Equality, carrying out actions aiming to alert to and prevent domestic violence, with a support office for victims of domestic violence providing psychological support, referral to the appropriate bodies and legal information; promotion of mutual help groups; accompaniment of aggressors; holding pedagogical activities on the subject in schools; and organizing awareness initiatives. In this line of intervention, gender equality is also promoted through training actions, awareness sessions, debates and campaigns, drawing up and developing plans for equality and production of pedagogical material.
- Social inclusion of socially and economically vulnerable children and young people. Here, the organization promotes young entrepreneurship, non-formal education, runs a Digital Inclusion Centre, organizes parental training workshops, stimulates local partnerships and provides vocational guidance for young people.
- Volunteerism, developed through drawing up volunteer programmes, running volunteer groups, promoting training, volunteer participation in seminars, workshops and other events on gender equality and non-violence.

The case study focuses on the last sphere of intervention, promoting volunteerism through the UBICool initiative.

3.3 UBICool – University Volunteers

The UBICool initiative was born in 2011 (Figure 2) in the scope of the European Year of Volunteering and Active Citizenship aiming to challenge students at the University of Beira

Interior (UBI) to hold activities promoting a culture of peace and non-violence in schools in collaboration with CooLabora. The voluntary action “centres on encouraging pedagogical games in school playgrounds, with a view to preventing problems such as bullying or violence between boyfriends and girlfriends, and strengthening pupils’ capacity to solve conflicts without resorting to violence” (CooLabora, 2015c).

Figure 2 – UBICool Logo



Source: CooLabora (2015b)

To analyze this initiative, it will be set in the circumstances that led to its emergence, its orientation towards the target public, its operation, the underlying processes and the communication channels and strategies used to publicize the voluntary action.

So beginning with the circumstances motivating the initiative, two types can be pointed out. Firstly, commemorating the European Year of Volunteering and Active Citizenship, in the scope of which various national and international initiatives were carried out, and secondly, the need or problem associated with this initiative – violence at school. According to the national study by Caridade (2009) about the prevalence of violence in romantic relationships, which involved 4.667 young people aged 13 to 29, 25.4% of young people said they had been a victim of at least one abusive action in the last year and 30.6% admitted being the aggressor, with emotionally abusive behaviour being most frequently reported (19.5%), followed by physical abuse (13.4%) and serious physical violence (7.6%). Similarly, the UNICEF (2014) report on violence perpetrated on children reveals that the percentage of adolescents victims of bullying in Portugal, between 2003 and 2013 was 37%, showing the relevance of this type of intervention.

Concerning orientation to the target public, this type of initiative can be said to be directed towards its target public at two levels. Firstly, this is a volunteer action directed to adolescents carried out by young people at the start of adulthood, and therefore it can be noted there was great concern that the initiative should use a type of language that came close to the target public – adolescents, but that it should also have a motivational interest for the volunteers, as the situation is also close to them, and many of them may become involved, especially in violence between boyfriends and girlfriends.

Organization of the initiative was as follows. Initially a collaboration protocol was signed between the University of Beira Interior and CooLabora, as partners in this initiative. Volunteers are recruited directly in UBI by the members of CooLabora, this being done in the first year of the initiative through organizing a seminar in the scope of the European Year of Volunteering and Active Citizenship held on UBI premises with the participation of Elza Chambel, president of the National Council for the Promotion of Volunteerism. In subsequent years recruitment has been carried out with the presence of CooLabora members in classes where students participate, leading to a very positive take-up. To spread the word, initially contact is made with some university lecturers who agree to receive CooLabora members at previously agreed times in certain classes. To carry out voluntary action, the process is quite similar, i.e., after establishing partnerships with the schools where intervention is to

be carried out, teachers responsible for the 5th to the 12th years are contacted in order to organize places and times to perform the initiative.

At the agreed times, members of Coolabora together with the UBI volunteers, who previously received training about the action to be carried out, on the subject of gender equality, as well as in a dramatization, set the action in motion. This consists of addressing the topics analyzed and organizing pedagogical games previously tested by the volunteers. These deal with subjects such as gender stereotypes, violence in romantic relationships, bullying, conflict management and others.

Those games are part of a Coolkit, which is “an educational resource containing a set of entertaining-pedagogical activities (group dynamics, cooperative games, role-playing activities and other techniques) directed towards dealing with gender issues and work on competences for conflict management in adolescents and other young people” (Rojão et al., 2011:11).

Concerning processes, elaboration of the Coolkit involved the collaboration of pupils and teachers at Quinta das Palmeiras Secondary School in Covilhã and Coolabora members. Its conception allowed organization of the results of the experience in this school and creation of an instrument to be shared which can be used by other teachers. Also regarding processes, it is of note that the actions are thought out together with the volunteers, who can suggest new approaches or games to implement.

As for the communication strategies used to publicize the initiative, various actions were developed through several channels. One of the strategies involved producing the initial campaign, carried out by UBI students in the scope of a communication discipline. This strategy allowed an orientation to the target public, as it was carried out from students to students and therefore using a language and appeals that were certainly known and recognized by the students targeted, also allowing the word to be spread by the students involved in its creation. Also used as a strategy were dramatization actions held in the university bars. Regarding communication channels, these were varied, including leaflets about the initiative, the Coolkit, the Coolabora website, posters and email messages to all students from the university itself.

It is also of note that in terms of motivating volunteers, they signed a volunteer contract, officially recognizing the importance of their functions. Whenever possible they attend seminars about violence, together with Coolabora, to present their experience and also help in other events related to violence.

For assessment of the action, this is done informally, but also formally through a questionnaire for volunteers. In that questionnaire, Coolabora evaluates what volunteers enjoyed doing most and the actions in which they most enjoyed participation, as well as the skills the volunteers considered they had developed. As the main competences acquired, the results of the study made by Coolabora point to the development of communication skills, especially with young people, interaction and socializing with others, cooperation, not giving up, self-esteem, appropriate behaviour, openness to others, overcoming obstacles, mutual help, trust, the ability to speak in public and personal development in general.

4. REFLECTIONS ON THEORY AND PRACTICE

In the first part of this article, reference was made to the importance of marketing for non-profit institutions and the difficulty these often have in putting into practice marketing principles that can make their strategies more effective, and more specifically their strategies to recruit and hold on to volunteers.

The case study presented here deals with a university volunteer action born from a partnership between CooLabora and UBI, aiming to recruit volunteers for action in the field of promoting non-violence and gender equality in schools.

The importance of volunteerism for developing non-profit organizations' capacity is widely recognized in various studies (e.g., Brown and Moore, 2001; Eisinger, 2002; Lough et al., 2009), and also by the United Nations (UN Volunteers, 2002). Data from the study characterizing volunteerism in Portugal indicate a rate close to 20% in 2011 (PROACT, 2012), a much lower rate than in other European countries (EVMP, 2011), and so analysis of the strategies used by non-profit organizations related to this subject becomes relevant.

Underlying analysis of the case study was the literature review carried out, above all the studies by Andreasen and Kotler (2008) who mention the motivations and barriers usually found for participating or not in volunteerism, and the study by Wymer and Starnes (2001), who point out various factors to take into consideration in forming these strategies, namely identification of the motivations and barriers to volunteering, definition of the functions and the necessary capacities for successful volunteering; the development of reward and motivation strategies, and the communication channels to use, among other factors; and final assessment of the process.

The analysis showed that in this specific case of the UBICool volunteering action, various factors are taken into consideration, despite some still lacking a degree of formalization. There was concern about identifying the type of volunteer to recruit, in this case young university students, as from their profile they will be more able to communicate with school pupils who look up to them due to being at a more advanced stage of study. According to the elements of the interview with the person in charge of the initiative, the volunteers are above all female. Furthermore, there was also concern about defining the functions to perform, as these are communicated to the volunteers, to the extent of having practice and preparatory sessions before going into the schools.

As for identification of the underlying motivations and barriers, CooLabora is concerned with identifying formally, a posteriori, volunteers' preferences in terms of the activities they most enjoyed and what they liked doing most, and there is an identification of what motivated them to volunteer for the initiative in the first session. Although, no barriers identification is carried on what might have prevented other students from doing so, and so this a factor that should be improved. Nevertheless, CooLabora gathers important information about volunteers' perceptions of the skills they acquired and that can be fundamental information for future campaigns and for motivating volunteers in subsequent efforts. According to the data from the surveys collected by CooLabora, volunteers say they have developed skills of communication, interaction and socializing with others, cooperation, not giving up, self-esteem, appropriate behaviour, openness to others, overcoming obstacles, mutual help, trust, the ability to speak in public and personal development in general. So in future efforts, CooLabora will be able to use this information to attract more volunteers, as these competences are transversal to all areas of study and fundamental for any student's future career. In addition, as a way of extending this effect, CooLabora could also articulate with UBI a form of accrediting these competences, based on a co-curricular programme, similarly to what is done in many other universities worldwide or even integration in a curricular programme based on service learning, as in both aspects empirical evidence of very satisfactory results has been found (Keen and Hall, 2009; Lizzul et al, 2015).

Analysis of the case study also showed there was concern about how the message was conveyed to potential volunteers, namely through creation of the campaign by university students and also the channels used to publicize it, i.e., classes, the internet, leaflets and also dramatization in university bars.

Concerning motivation, there is found to be strong support for volunteers, in terms of both information and training, and support during voluntary actions, as they are always accompanied by members of CooLabora. In addition, recognition of the work done by issuing a volunteer contract is also very positive, as suggested by Wymer and Starnes (2001).

In post-recruitment, it stands out that although CooLabora shows concern about understanding what went well and badly, this procedure should become more formal and be linked to a previous study about volunteers' expectations before recruitment.

5. CONCLUSION

Based on a case study, this article intended to build a bridge between the theory and practice of recruiting volunteers by non-profit organizations, specifically by CooLabora in the UBICool volunteer initiative. That action benefits both CooLabora and UBI. Through it, CooLabora can increase its capacity for intervention and its effectiveness with a very specific target public, pupils in pre-university education, and UBI can provide its students with complementary ways of developing transversal capacities and also strengthen the community and social aspect of its mission.

The case studied shows, without attempting to make any kind of generalization, that non-profit organizations can indeed gain efficiency and effectiveness in their operations by applying theoretical principles of marketing to their actions, and so when those capacities are absent from their institutions they can also be acquired through volunteerism, once again in Win-Win-Win partnerships, with gains for the institution, the volunteer and society.

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A SOCIAL MARKETING APPROACH FOR DEVELOPING A NEIGHBORHOOD NETWORK

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ABSTRACT

This paper focuses on a social marketing project proposal for a community in a social housing neighborhood in Faro, in southern Portugal. The aim of the research is to discuss the possibility of the implementation of a neighborhood network, using a social marketing approach with the goal of strengthening the ties of cooperation, solidarity and friendship between the inhabitants of the neighborhood with a view to fostering social cohesion in the city. The paper offers a theoretical and empirical discussion about the characteristics of particular areas designated as social housing neighborhoods. Data collection was performed *in loco* by giving a questionnaire to the inhabitants of the neighborhood and by direct observation. The results facilitated a balance between the needs of the residents and their ability to help their neighbors. The results are followed by a discussion and a proposal for a social marketing project targeted to the neighborhood under study.

Keywords: Social Marketing, Neighborhood Network

JEL Classification: M310, I310

1. INTRODUCTION

Studies on social ties in urban areas have evolved from different perspectives. Since the beginning of sociological studies, this theme has been a subject for discussion. Durkheim (1977) argues that a specific kind of solidarity is developed in modern society – organic solidarity – that appeals to the specific contribution that each individual makes to the harmony of the whole. In this kind of society, there is more individual freedom although collective action is more fragile. Wirth (1938) stresses that urban planning is a form of social existence and claims that with urbanization individuals live very close to one another. However, people do not know each other personally and the interactions between them are only temporary and partial and only constitute the means of achieving specific goals. Thus, social relations and bonds become increasingly weaker; the pace of life of individuals is faster than in rural areas and “competition prevails over cooperation” (Giddens 2010: 577). Currently, several projects on social neighborhood networks are being developed in order to revive these ties of sociability and community, aiming to strengthen community relations and social cohesion. These projects aim to benefit the communities and to meet the needs of the residents.

Social marketing, as a discipline, has evolved since the 1970s (Kotler and Zaltman, 1971) and has contributed to the mitigation of several social issues. These issues are not only related

to environment, health, safety, and to financial health but also to community involvement aspects. Social marketing uses the instruments of commercial marketing to encourage individuals' behavioral change in relation to a specific social problem, on a voluntary basis, aiming to benefit specific groups of individuals while having a positive impact on society (Andreasen, 1994; Kotler & Lee, 2012). The social marketing projects should include all stages of the mainstream marketing plan, from strategic to operational aspects.

Nowadays, a large majority of people resides in large urban areas. The census data from the National Statistics Institute reveals that in 2011 about 72% of the population of Portugal lived in urban areas. The social housing neighborhood of Santo António do Alto was built in the late 1990s, in order to resettle the original inhabitants of the neighborhood of Atalaia. It is located in the city of Faro, on the outskirts of the city. The social housing is mixed with private housing and this allows for the presence of different social groups. There are some social institutions in the different action areas and also some local shops that tend to the needs of the inhabitants. Faro is a city of 61,334 inhabitants¹ and it is an area with a high concentration of regional public services. The social housing is on a small scale in the city but the social problems extend far beyond these specific areas of poverty and social exclusion.

In a context where social risks should be prevented, this paper aims to explore an analysis of the needs and the willingness of the community of Santo António do Alto in Faro to participate in a neighborhood network. Furthermore, this paper intends to use a social marketing approach to propose a pilot project for a social neighborhood network called "Rede de Vizinhança" in that specific context. With regard to the behavioral objective, the proposed project aims to strengthen the ties of cooperation, solidarity and friendship between the inhabitants of Santo António do Alto, leading to an improvement in the quality of life of the residents.

2. LITERATURE REVIEW

2.1 Social neighborhoods and network projects

A neighborhood is characterized as being a community or region aggregated to a town or city. Particularly, a social housing neighborhood is mostly understood to be problematic because it involves a high population density with people from various cultures and with different social problems. This generalized idea results in the process of negatively stereotyping these neighborhoods, which are built in order to re-house individuals and families who are in precarious situations (Caetano, 2009; Moura, 1988). Hence, social housing areas are seen as degraded and involved in local conflicts, which is translated into a no win-win situation for the inhabitants of those same neighborhoods (Fernandes, 1977). Accordingly, neighborhoods are perceived beyond their territorial aspects due to their multifaceted social interactions, which are framed by specific social identities. The concept of a neighborhood society refers to a specific type of social setting that is marked by a strong cultural identity. Specific factors of interaction coexist, which result from the link between the existing dynamics in the neighborhood (internal) and those that are external. This process results in multiple relationship dimensions, attitudes, behaviors and specific symbolic valuations that impact personal and group belonging (Costa, 1999).

In community psychology literature, the concept of a sense of community is broader than the idea of a sense of cohesion and it encompasses the interrelation between membership, influence, integration and fulfillment of needs and shared emotional behavioral (McMillan and Chavis, 1986). In this respect, Long and Perkins (2003) stress that the sense of

¹ Source: Portugal Statistics, data from the projections for 2013.

community is intimately related to social connections, mutual concerns and community values. Furthermore, the sense of community is linked to the concept of social cohesion, which is a sense of belonging to a group. The feeling of group morale makes cohesion, place attachment and residents' satisfaction related aspects (Boessen *et al.* 2014). In this domain, Boessen and colleagues (2014) conclude that "residents who report more spatially disperse networks for certain types of ties report lower levels of neighborhood and city cohesion. Residents with higher triangle degree within their neighborhood safety networks perceived more neighborhood cohesion" (2014: 447).

Considering that the processes of strengthening ties between neighbors and of meeting residents' needs are important for social cohesion and residents' quality of life, social neighborhood projects are being developed worldwide in order to benefit specific communities. For example, Nextdoor.com is a free social network for communities where only residents of specific neighborhoods can interact and exchange information and needs among themselves. According to this organization the main aim is to "build stronger and safer neighborhoods" and people are using Nextdoor.com, among other things, to: quickly get the word out about a break-in, organize a neighborhood watch group, track down a trustworthy babysitter, ask for help looking out for a lost dog, or find a new home for an outgrown bike. It also provides an opportunity to call the neighbors by their first names. Since its launch in 2012, over 79,000 neighborhoods are using Nextdoor.com in the U.S. (<https://nextdoor.com/>). Also, there is the concept of the "Social Street" originating from the experience of the Facebook (FB) group "Residents in Fondazza Street – Bologna", started in September, 2013. This initiative shows the strong desire to reinforce social ties in cities. The purpose of the Social Street is to promote socialization between neighbors resident in the same street in order to build relationships, to interchange needs, to share expertise and knowledge, and to implement common interest projects, with common benefits from a closer social interaction (<http://www.socialstreet.it/international/info-english/>). All over the world there are many urban experiences promoted by citizens to improve the quality of social relations in their neighborhoods. The "Transition Town" Movement is one which has spread to many countries especially in Europe and it appeals to a holistic way of life that comprehends not only social relations but also a consumption and a production lifestyle that is more sustainable and that addresses the challenges of the environmental problems that we are facing today (<https://www.transitionnetwork.org/>).

2.2 The social marketing approach

The classic article "Social Marketing: An Approach to Planned Social Change" from Kotler and Zaltman (1971) points out social marketing as a discipline focused on the acceptability of social ideas and since that time its approach and definition have been discussed (Andreasen, 1994; Dann, 2010). Andreasen (1994) stresses that the voluntary aspect of accepting behavioral change should be the central goal in the social marketing approach. Social marketing should meet the needs and profile of the target audience (Takahashi, 2009) and should follow all the stages of a mainstream marketing plan. In this light, social marketing can be defined as the "the adaptation of commercial marketing technologies to programs designed to influence the voluntary behavior of target audiences to improve their personal welfare and that of the society of which they are a part" (Andreasen, 1994:110).

The evolution of marketing as a discipline has allowed for the application of marketing techniques for goods and services, ideas, people and places (Kotler and Lee, 2012). Specifically, social marketing has extended the application of marketing to the areas of public health, safety, environment and community in order to influence behavior, while benefiting the individual and society (Kotler and Zaltman, 1971). The social marketing approach has been particularly useful in contributing to mitigating the social problems and the needs of

governments and decision-makers for coercive mechanisms aimed at changing the behavior of individuals and groups to achieve policy goals (Hall, 2014).

It is worthy of note that social marketing is not synonymous with a communication campaign. The latter has a limited time of implementation, is focused solely on information and thus is insufficient for assessing behavioral changes. Typically, a social marketing project integrates different communication campaigns in several stages over time and with specific objectives, in addition to all the variables of strategic and operational marketing. Hence, social marketing programs should include all the stages of a mainstream marketing plan: situational analysis, segmentation, positioning (identification of behavioral barriers, benefits and competition), objectives, marketing mix (product, price, promotion and place) and monitoring and evaluation the project (Kotler and Lee, 2012).

3. METHODOLOGY

The target population of “Rede de Vizinhança” lives in the social housing neighborhood of Santo António do Alto, located in Faro. The aim is to promote a mutual aid network among people who voluntarily support their neighbors and, in turn, are supported in their difficulties and daily needs. According to existing data, this neighborhood has 149 apartments, 146 of which are leased. It consists of a set of buildings built for the purpose of social housing and it has an estimated population of around four hundred people. The socially homogenous profile in the area of social housing can be conducive to the development of neighborhood networks and can also manifest itself as an obstacle to the establishment of exchanging and sharing, because social needs tend to be common and existing resources tend to be limited among residents of the locality. However, the fact that it is a mixed residential neighborhood – social and private housing – means that it can provide a context for maximizing resources.

The process of understanding how a social marketing project could be developed required an analysis of the dynamics of the locality, during three months (March to May) in 2014. The study uses a methodological triangulation approach, combining an extensive with a comprehensive perspective to reinforce the confidence on the data collected (Giddens, 2010; Pérez Serrano, 1994a; 1994b). An extensive collection of data applied directly to the present population. The work resulted in the monitoring of ongoing activities within a local intervention project - Local Contract for Social Development “Faro Adentro”. This project centered on the promotion of territorial cohesion and the reduction of social inequalities in higher economic vulnerability areas and had a set of ongoing activities financed directly by the Portuguese State (Social Security Institute). This project included informal educational activities and community revitalization, based on the promotion of individual and social skills. The aim was to improve the quality of time for leisure and to provide people with the basic knowledge to enable them to decrease the exclusion criteria to which they are subject. In addition to the analysis of secondary data (e.g. local organizations reports), direct observation was conducted which allowed the systematization of information on the dynamics of the territory under analysis. This enabled an evaluation of the availability of the population to participate in the project that the present research is focused. Notes were taken of informal conversations made with this specific purpose.

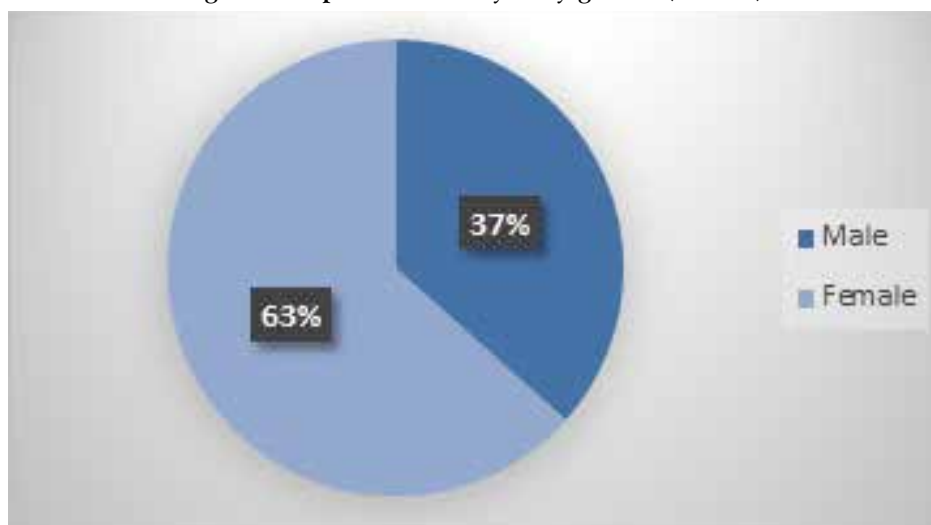
To assess the overall needs of the people and their willingness to work with resources capable of mobilizing a neighborhood network, a questionnaire survey was used. This was given to the population over 17 years, which is estimated to represent $\frac{3}{4}$ of the total population living in the social housing area. It was possible to obtain a convenience sample of 41 people (which corresponds to more than 10% of the total population and about 30% of the population over 17 years old). The questionnaire was intended to collect primary data

on the residents, such as sociographic features, and information about perceived specific needs and the voluntary support that the residents of Santo Antônio do Alto neighborhood could offer to their neighbors. The data was analyzed using the SPSS (Statistical Package for the Social Sciences) software.

4. QUESTIONNAIRE RESULTS

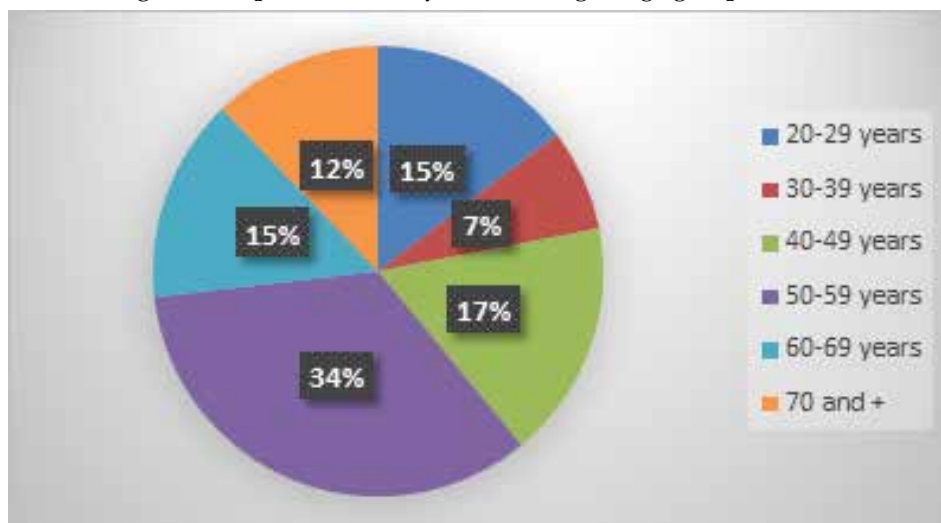
Of the total respondents, fifteen were male and twenty-six were female, aged between 20 and 84 years. As regards the representation by age group, those individuals aged between 50 and 59 years occupied a modal position (representing 34.1% of the sample), the age group from 30 to 39 years had fewer individuals included in the sample (7.3% of respondents) (Figures 1 and 2).

Figure 1. Population surveyed by gender (n = 41)



Source: Questionnaire applied to the population of the Neighborhood of Santo Antônio do Alto, 2014.

Figure 2. Population surveyed according to age group (n = 41)



Source: Questionnaire applied to the population of the Neighborhood of Santo Antônio do Alto, 2014.

4.1 Needs and resources to promote the “Rede de Vizinhança”

One of the dimensions considered in the questionnaire given to the population refers to their previous involvement in voluntary initiatives. It appears that the vast majority had never been involved in voluntary activities (85.4%), although among those who never participated 60.5% expressed a willingness to do so. Of those who have participated in these activities, women were more likely to do voluntary work (19.2% of the women surveyed reported having participated in such activities), as well as the population aged between 20 and 29 and 50 and 59 years (33.3% and 21.4% of the population at these ages, respectively, had already performed volunteer work). When analyzing the willingness to participate in voluntary activities there are no relevant differences due to gender and age.

Efforts were also made to verify the availability of the reporting population to help neighbors in their daily difficulties. It appears that most are available to do so (61%) but women are the ones who most demonstrate this desire (65.4% of all surveyed). It is only in the population over 70 years that we observe no availability. This is noticeable because it is a population that shows more vulnerabilities and fewer resources that could be harnessed to support neighbors.

For needs assessment it was intended to understand the set of daily activities in which individuals could benefit from support from neighbors. It was concluded that of the 21 participants who have mentioned these needs, 17 (81%) are women. It is also observed that the number of people that have some kind of need for support increases with age. This is perceived because of the limitations that increase with age (from 21 respondents with support needs in their daily lives, 16 (76%) were over 50 years).

The identified needs list is very extensive but those stated by more than 30% of those people who reported feeling support needs relate to: bureaucratic issues; outings; grocery/store shopping and entertainment activities. The first type of needs can be directly associated with lower levels of education, which are particularly felt among the older population. Also, older residents had mobility issues and a need for help with grocery shopping. It is, however, interesting to note that there are needs indicated by a greater number of people in areas that relate to the creation of social networks (including outings and social activities). This is particularly relevant for the project presented in this paper (Table 1).

The other question relates to the availability of the population surveyed to give voluntary support to neighbors for specific tasks and this response was provided by 25 of the 41 respondents. The list of tasks is the one used to identify the needs. There are no marked differences according to age groups but there was a greater availability of women for this initiative (17 said they were available for some of the tasks stated).

The availability to perform multiple tasks is stated by a significant number of respondents who answered this question. However, there are differences between the practice and demonstrated availability, which incidentally was confirmed by the small number of residents who had previously participated in voluntary activities. The most marked answers refer to visits to the pharmacy, grocery shopping, walks, home repairs and sporting activities (referenced by 14 or more respondents). There is (in general) a greater number of people available to help those who claim the need support in various tasks indicated. Such a tendency would facilitate the introduction of the project proposed here.

Table 1. Population surveyed by type of felt needs and the kind of voluntary support they would be willing to develop

	Type of felt needs	Type of voluntary support available
	Percent of Cases (n=21)	Percent of Cases (n=25)
Shopping at the supermarket / shop	33.3%	68.0%
Buying gas	14.3%	40.0%
Going to the pharmacy	14.3%	76.0%
Going to the hospital	28.6%	52.0%
Going to the health center	23.8%	52.0%
Going to the post office	19.0%	44.0%
Meal preparation	19.0%	36.0%
Caring for pets	4.8%	36.0%
Household cleaning	23.8%	28.0%
Putting out the trash	4.8%	44.0%
Home repairs	28.6%	56.0%
Taking care of kids	4.8%	36.0%
Caring for elderly	4.8%	36.0%
Mechanical aids	14.3%	28.0%
Tours	38.1%	60.0%
Sports activities	23.8%	56.0%
School support for children	9.5%	24.0%
Educational support for younger people	9.5%	20.0%
Support with bureaucratic issues	42.9%	32.0%
Aesthetic issues	9.5%	28.0%
Sewing	19.0%	28.0%
Taking / children to school / day care	9.5%	36.0%
Helping with mobility and transportation	4.8%	44.0%
Gardening	4.8%	32.0%
Social activities	33.3%	40.0%
Total	442.9%	442.9%

Source: Questionnaire applied to the population of the Neighborhood of Santo Antônio do Alto, 2014.

5. “REDE DE VIZINHANÇA”: A SOCIAL MARKETING APPROACH

The analysis of the collected data, followed by a PESTE (political, economic, sociocultural, technological and ecological issues) and a SWOT analysis (strengths, weaknesses, opportunities and threats to the project) showed that although there are some barriers to the desired behaviors, the residents of Santo Antônio do Alto are receptive to participate in a neighborhood network. The main objective of this project proposal is to change in a voluntary way the behaviors of the neighborhood residents. The goal is to strengthen ties

and promote cooperation and friendship between neighbors as a means of contributing to the improvement of the living conditions of those individuals and to mitigate isolation.

In addition to the main targets, the social marketer should take into account the possibility of identifying secondary segments, groups of people or organizations that are directly or indirectly, connected to the main segments that may prove to be an asset to the program, simplifying behavior changes (Santos, 2012). This project proposal “Rede de Vizinhança” is directed to individuals older than 17 years living in the neighborhood of Santo António do Alto in Faro, Portugal. The secondary targets are local organizations that can be social partners in the project and also the academic community that can be motivated to study the progress of the project in several academic perspectives. In the neighborhood, there is a variety of social institutions that have different target groups and that are a fundamental resource in the dissemination of the intentions of the project, mobilizing more people to the network. At a university level, is important to evaluate the methodology developed and its impact so it can be improved in the future.

The main barriers identified to achieving the desired behavior are related to aspects of individualism. Most neighborhood residents showed an interest in the implementation of a social neighborhood network, concluding that mutual support can be a way to minimize their daily difficulties and develop new friendships. A few individuals revealed some apprehension regarding this potential project, stating that “the inhabitants of social housing do not help each other,” since there is a strong sense of individualism on the part of these people and, on the other hand, there is a lack of time availability. One inhabitant stated: “I have no time for myself, let alone others.” On the other hand, combating isolation, extending the circle of friends, acquiring new knowledge through contact with each other and creating a more harmonious environment in the neighborhood are some of the main benefits associated with the adoption of the desired behaviors. The fear of being exposed to someone unknown and the need to provide time that could be used, for example, to rest and engage in leisure activities, ultimately prove to be the barriers and competing behaviors that challenge the goals of the proposed project. It is worth noting that although the barriers can be internal or external, real or perceived, they are always from the target audience’s perspective and often something that the promoters can address (Kotler & Lee, 2012).

With respect to the social product, the process of strengthening mutual ties of neighbors is the focus of the project “Rede de Vizinhança”. In order to promote and differentiate this project from other projects, some brand identity elements were developed (Figure 3). The “Neighborhood Office” could be the main physical support for this work, because the residents can go there to get information about the project and how they can be part of the network. This office is supported by the Municipality of Faro and is a community resource that has different rooms where people and organizations can meet each other and develop specific activities (it has a Book Bank, a room for development of arts, another room for photography and meeting and training rooms). At the Social Action Department of the Municipality there is also a Volunteer Bank, which is the organizational context where this project could be held. The residents could also have a website where they can be aware of the activities of the social network. Additionally, we propose the “Neighborhood Corner”, a list of contacts, needs and availabilities that can be presented both in the office and on the website. To access this information, one has to provide identification as a resident in the neighborhood.

Figure 3 - Project logo



The findings of the empirical research reveal that the neighborhood residents under analysis showed an interest in participating in several activities with neighbors in order to create new bonds of friendship and cooperation and to strengthen existing ties. The organization of a diversity of activities in the neighborhood is crucial because without them residents won't feel encouraged to engage with their neighbors and engage instead in individual activities (e.g. watching TV, cleaning the house).

The "Hiking Friend" is a proposed activity that intends to unite neighbors. It was observed that some of the inhabitants considered important to perform sport activities with other residents in order to promote their physical well-being and create new ties of friendship. This activity consists in organizing weekly walks, on a day and time to be agreed with the community.

The project also encourages the development of a dynamic and informative newsletter where the residents are the content providers. This newsletter could be organized in sections such as: general information about the region; monthly activities plan in updates regarding the "Neighborhood Corner"; and a space dedicated to the participation of residents where they could contribute with poems, recipes, and tutorials (crafts, decor, hairstyles), and share other knowledge with their neighbors. This publication could also have a playful-educational part with games and curiosities. The magazine could be distributed monthly to homes in the neighborhood and on the website, so that the inhabitants could have easy access to them.

Another initiative for the neighborhood network of Santo Antônio do Alto is the creation of a community garden, where residents can cultivate some staple foods. Because some people are unemployed and have economic difficulties, creating a garden would aim to keep people busy and channel their free time. This would also strengthen the mutual ties with its neighbors and satisfy some of their nutritional needs. The experience with this kind of intervention reveals that it is one of the more successful in improving generation ties and combating stress factors in the population (Cabo *et al.*, 2014).

An action for volunteering is also included in the project proposal, following the responses of residents to the questionnaire. The volunteering action has three main objectives: to inform the population about what is volunteering; to encourage individuals to volunteer; and to further develop and promote volunteer work in the neighborhood. This action provides an opportunity to allow discussions on values, such as ethics and citizenship, in addition to encouraging solidarity between neighbors.

In the social marketing approach, the concept of price is based on the costs associated with the adoption of the desired behavior by the target group. These costs can be monetary and non-monetary, such as the time, effort and energy. Costs related to the adoption of new behaviors are called input costs. Costs associated with the abandonment of previous behavior are called exit costs (Andreasen, 1995). In the case of "Rede de Vizinhança", non-

monetary costs relate to existing barriers for the adoption of new behaviors, such as limited time availability and perceived monetary costs associated with new efforts to integrate this type of self-help network. The improvement in living conditions, strengthening and creation of friendly relations, cooperation and also a more harmonious atmosphere among the residents in the neighborhood are some of the incentives for the target group to adopt the desired behavior.

Distribution is how the product reaches the target. The aim of an intangible product, such as this project is to reach out to people in a place where they take decisions related to behavior or think of behavioral change (Kotler & Roberto, 1989). Hence, in the case of the “Rede de Vizinhança” distribution is physically focused on Santo António do Alto in Faro, because it is the place of residence of the target group. As previously stated, the neighborhood has an office with opening hours where people can go and ask for information about the project and join the network. In addition to the physical space there is also an online service (website) where individuals are able to learn about the project (mission, goals and vision), to access news and activities associated with it and also to interact in real time with other neighbors, after an online registration with strict privacy policy.

Regarding communication, the newsletter, the website and the office are the main media for the main target. In addition, it is intended to prepare leaflets on the project that will be available at the office and distributed in the mailboxes of the residents. Also, a promotional video including the testimonials of some residents could be available in social networks with the objective of raising awareness of the project and increasing people’s interest in joining the network.

The promotion and dissemination of the activities carried out under the project could also be broadcast on the university radio, Rádio RUA. This is considered to be important because although this is a radio intended for students and not intended for the project’s main target audience it is a means for the project to increase awareness within the academic community. This would allow for fostering interest for this project to be studied at an academic level and finding more volunteers to expand the project.

Following this, comes the idea of conducting a flash mob, an occasion in a public place to perform a certain prearranged unusual action. It is a means of communication in a physical location in order to promote and make known a certain project or activity. This action could be organized by local organizations and volunteers in the project. Residents could be invited to be present at a strategic spot in the neighborhood at a specific hour where the performance would take place. Later, information about the project would be available.

An instrument to monitor and evaluate the project should be developed by an academic team in partnership with local organizations aiming at local development.

6. CONCLUSION

The purpose of this paper was to explore and analyze the needs and the willingness of the community of Santo António do Alto in Faro, South Portugal, to participate in a neighborhood network. Based on the collected data, a project for a neighborhood network named “Rede de Vizinhança” using a social marketing approach was proposed. This project proposal using the social marketing approach focused on Santo António do Alto neighborhood as a protective place for its residents and encouraged neighbors to strengthen their ties for the benefit of all residents as individuals and as a community.

The previous social intervention developed in the area under study was based on direct financial support from the State for the vulnerable communities of the municipality. After that intervention, the activities that were previously developed had come to an end. Although

there is a rich organizational context, regarding the targeted population of the different social institutions that are placed in the neighborhood, the end of that financial support left a void in the cultural and social activities that were developed over two years. It is important to look at the present proposal as an instrument that can contribute for the creation of local dynamics to ensure social cohesion among the inhabitants. In fact, in the municipality of Faro there is specific context and resources that can help to put this proposal in practice, specifically the already existing Volunteer Bank and the Neighborhood Office.

Given that most of urban neighborhoods, and specifically social housing areas, have needs for socialization and strengthening of social ties to prevent social risks (such as isolation, lack of social support, among others), this proposal could be extended to other localities. The activities proposed are sufficiently general to be applied to neighborhoods with different characteristics. Because there is the need to localize any kind of intervention, it is only necessary to clarify the specific needs for volunteer support as the willingness of neighbors to give that support and to identify the organizational context that can help the improvement of the project. “Rede de Vizinhaça” is, in this perspective, considered a global proposal to give support to social cohesion in cities.

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Sites:

<https://nextdoor.com/>
<http://www.socialstreet.it/international/info-english/>
<https://www.transitionnetwork.org/>

THE REVISITIALIZATION OF THE QUERENÇA MARKET: EXPLORING THE VISITOR EXPERIENCE

Sara Fernandes
Dora Agapito
Júlio Mendes

ABSTRACT

Within the paradigm of the experience economy, the literature has recently focused on the importance of creating the conditions to provide individuals with positive, meaningful and memorable consumption experiences. The consumption experience model proposed by Pine and Gilmore, which is based on four dimensions – entertainment, aesthetics, education and escapism – has been operationalized and adapted in several settings. This study presents the results obtained from the analysis of participants' experiences at the Querença Market, from the perspective of visitors. This initiative is part of a pilot project for territorial intervention – the *Querença Project* - which was implemented by nine young graduates in the region of Algarve, Portugal. Through a diversified offering of products and cultural and nature-related activities, based on the co-creation process with the local community, it was possible to revitalize the traditional village market, which became extinct 70 years ago. The results of the questionnaires presented to visitors of the market highlighted the multi-sensory nature of the event, which is related to the wide diversity of sensory stimuli associated with food, agricultural products and human interaction. Visitors described an overall positive and memorable experience, emphasizing the dimensions related to “aesthetics” and “entertainment.”

Keywords: Consumption Experience, Experience Economy, Rural Areas, Querença Market

JEL Classification: M39

1. INTRODUCTION

The consumption experience has been a theme addressed in many studies and in several academic fields, suggesting that there is great potential for the application of the concept (Carù and Cova, 2003; Walls *et al.*, 2011). Many authors agree that consumer experiences are inherently personal, influenced by individual and situational factors, and thus, composed by different, but interrelated dimensions, such as the following: sensory, intellectual, emotional, physical/behavioral and social (Bitner, 1992; Holbrook and Hirschman, 1982; Schmitt, 1999; Schmitt and Simonson, 1997).

From the view that environmental conditions can be created in order for individuals to have unique, positive and memorable experiences, the beginning of the 21st century has witnessed a scenario in which management and marketing managers, whether in the convenience and shopping goods market, the leisure and tourism areas, or the non-profit sector are focused on enhancing experiences for individuals (Walls *et al.*, 2011). This idea is based on the experience economy paradigm, which was disseminated by the work of

Pine and Gilmore (1998). Accordingly, the resulting theoretical framework proposed by these authors for the management and marketing of consumption experiences is composed of four dimensions that are considered to be crucial to a rich and meaningful experience – entertainment, aesthetics, education and escapism –, and it has been operationalized by other researchers over time (e.g., Oh *et al.*, 2007; Kastenholz, Loureiro, Marques and Carneiro, 2012).

Particularly, the experiential marketing approach to areas that are dealing with social problems, related to desertification and to the progressive exodus of younger people to urban areas, should center on carefully facilitating rich, positive, and diversified experiences by achieving balance in preserving endogenous resources, residents' quality of life, visitors' quality of visit, local providers' benefits and, consequently, aiming at local sustainable development (Kastenholz, Carneiro, Marques and Lima, 2012; Lane, 1994; Manente and Minghetti, 2006).

This is the case of the rural village of Querença (Loulé), situated in southern Portugal. Between 2001 and 2011, the village reduced its total resident population in 3.68% and it had a decrease of 50% in the group of young people, between 15 and 24 years old (INE, 2012). The region is experiencing a generational crisis, with one of the highest levels of aging in the Loulé council, compounded by a dispersed population, including individuals who live in complete isolation. The majority of its active population works either in the city of Loulé or on the coast. In Querença itself, in addition to craftsmanship, traditional agriculture is prevalent, even though it is perceived as a complementary activity that generates only small surpluses for sale (Alves and Fernandes, 2011; Vicente, 2006).

In 2011, the revitalization of the local market, which had ceased operating 70 years ago, was developed as part of a pilot project of social intervention named *Querença Project*, which engaged young graduates in the process of enhancing the natural, cultural and social resources of the region. This traditional market uses the experiential marketing approach and is co-created in a setting that offers local products, and cultural and nature-based activities, through a process involving the local community and visitors. Hence, the Querença Market is a local event of a social and economic nature that seeks to satisfy the domestic needs of the population and strengthen social cohesion, and to articulate the local products and traditions with the needs of consumers by providing the conditions for positive consumption experiences to emerge (Fernandes, 2013).

Against this background, this study aims to analyze the consumption experiences of visitors to the Querença Market (Loulé, Portugal) using the proposed framework of Pine and Gilmore (1998). Accordingly, the specific research objectives are to characterize the consumption experience of visitors to the Querença Market and to understand the elements or features that contribute to creating the conditions that enhance their consumption experiences.

2. LITERATURE REVIEW

Consumption experiences have been recognized as a particular economic offering, occupying a central role in society and holding a *premium* position on the four-stage-continuum of the progression of economic value, after commodities, goods and services (Pine and Gilmore, 1998). Indeed, current research shows consumers' preferences for experiences and stories, and hence, being engaged, when interacting with products and services (Holbrook and Hirschman, 1982). Therefore, the consumption experience generates more value for consumers when it encourages individuals' engagement and co-creation between the provider and the consumers (Poulsson and Kale, 2004; Prahalad and Ramaswamy, 2004).

Although experiences are personal, existing in the mind of an “individual who has been engaged on an emotional, physical, intellectual, or even spiritual level” (Pine and Gilmore, 1998:99), they can be partially managed in order to engage individuals. Managerial implications result from the fact that engaging consumers in positive physical and social aspects facilitates positive emotional states, satisfaction and loyalty to environments (Bitner, 1992), in which consumers are more likely to spend time and have more responsible consumption interactions (Kastenholz, Carneiro and Marques, 2012; Walls *et al.*, 2011).

According to Pine and Gilmore (1998), consumption experiences are differentiated on two levels: a) the extent of the consumers’ participation – passive participation *versus* active participation, and b) the degree of the consumers’ connection to the event – absorption *versus* immersion. Accordingly, these elements are combined in a framework based on four components: entertainment, aesthetics, escape and education. The “entertainment” dimension is considered to be the more passive domain, because the consumer mainly observes the activities and/or the performances of other individuals (e.g., attending a concert). The “aesthetic” realm requires an immersion experience resulting in the contemplation of the environment, and for that reason, the individuals’ participation is somewhat minimized (e.g., viewing the landscape). The “aesthetics” dimension is hence couched in the environment, i.e., it relates to the consumers’ interpretation of the physical environment around them. In the “education” dimension, the experience is active and absorptive, and the consumers play a leading role in the co-determination of their experience (e.g., a gastronomic class). Finally, the “escape” component entails high individual engagement, which may lead to meaningful and memorable experiences that contribute to the consumers’ personal development (e.g., a gastronomic workshop with locals).

Taking into account that the boundaries between the proposed dimensions are not inflexible, ideally, a consumption experience should be managed from the perspective of a “sweet pot”, i.e., an amalgam of all of the strong features of the consumption experience that are related to the different experience domains. Nevertheless, specific realms tend to be dominant at specific events, a characteristic that can be analyzed with managerial purposes (Oh *et al.*, 2007).

The absence of an appropriate scale for measuring the four realms proposed by Pine and Gilmore (1998) has faced some criticism. To address this limitation, Oh *et al.* (2007) developed a scale that is considered to be reliable and stable to analyze the proposed theoretical framework by Pine and Gilmore (1998) in the bed-and-breakfast sector. Afterwards, this scale has been adapted and tested by several researchers in other sectors, such as the following: cruises (Hosany and Witham, 2009), events (Park *et al.*, 2010), wine-based tourism (Quadri-Felitti and Fiore, 2012) and rural tourism (Kastenholz, Loureiro, Marques and Carneiro, 2012).

In addition, because experiential approaches outline the importance of hedonic consumption for individuals, the idea of devising the right multi-sensory environment is seen as contributing to value creation for both customers and organizations, which leads to more positive individual outcomes (e.g., positive affective associations, satisfaction, long-term memories, loyalty, and behavior) (Brakus *et al.*, 2009; Gentile *et al.*, 2007). As a result, sensory stimuli (visual, aural, olfactory, gustatory and tactile) have been highlighted as a crucial tool for marketing and managing unique and appealing holistic consumption experiences (Krishna, 2012; Schmitt, 1999). Furthermore, empirical studies stress the importance of the sensory dimension of consumer experiences when compared with other components (e.g., physical, intellectual, emotional, and social), highlighting sensory stimuli as key in engaging and co-creating value with consumers, as well in clarifying brand identity and brand image (Gentile *et al.*, 2007; Krishna, 2012; Schmitt and Simonson, 1997).

3. METHODOLOGY

3.1. Setting

The village of Querença is part of the Loulé municipality, which is located in the region of the Algarve, Portugal. The territory is rich in cultural, social and nature-based resources, as it is part of the Natura 2000 network. Since this village has experienced a progressive decline in its population, resulting in some social problems, the *Querença Project* was founded in 2011, the objective being to revive the village of Querença. A partnership between the Manuel Viegas Guerreiro foundation (non-profit organization), public and private local organizations and businesses, the municipality, the University of Algarve and the local community aimed to enhancing the value of the region's natural, cultural and social resources, and attracting educated young persons to live and engage in sustainable initiatives in the community for nine-month periods (Alves & Fernandes, 2011; Fernandes, 2013).

One of the central initiatives of the project was the revitalization of the traditional Market of Querença, which had ceased operating 70 years ago. The event takes place on the last Sunday of each month, based on specific themes. In addition to the agricultural products and handicrafts, several activities, such as workshops, are organized as part of the market. From October 2011 to June 2012, nine iterations of the event took place, following the model implemented by the *Querença Project*. Currently, the event is organized by the parish of Querença, Tôr and Benafim, and it returns to a local institution of social solidarity (Fernandes, 2013).

3.2 Instruments and data

An online survey created in *google drive* was used to collect the data, and it was implemented during September and October of 2012. The selection criteria for the target population were: visitors aged 18 years or older who had participated in at least one of the nine iterations of the Querença Market that took place between October 2011 and June 2012, and visitors who had voluntarily provided their email addresses during the activities featured at the event. From the 118 emails sent in a three phase process, 106 responses were considered valid for the analysis.

Four groups of questions were aimed at analyzing the four realms of the consumption experience, the sensory component related to the consumption experience and sociodemographic information. In its development, the questionnaire was subjected to a pre-test involving 10 visitors. Once collected, the questionnaires were subjected to minor adjustments regarding vocabulary and design. The first group of questions was adapted from Oh *et al.* (2007), Park *et al.* (2010) and Kastenholz, Loureiro, Marques and Carneiro (2012): 16 items were used to measure the four realms of the consumption experience at the Querença Market; three items to analyze the "memory" variable; four items to measure *arousal*; two items to examine future behavioral intentions; and one item to evaluate overall satisfaction. The second group used the five items suggested by Agapito *et al.* (2012) to assess the contribution of each one of the so-called five senses to a positive consumption experience in the Querença Market. All of the items were measured by a five-point Likert scale, ranging from 1 (strongly disagree) to 5 (strongly agree). The third group included an open-ended question that allowed visitors to freely express the sensory impressions related to their experience at the Querença Market ("Please recall your experience at the Querença Market. What did you see, touch, taste, smell and hear?"). The fourth group of questions was aimed at collecting sociodemographic information.

3.3. Data analysis methods

Descriptive statistics were implemented in the analysis of the data. The Cronbach's alpha coefficient was performed to verify the internal consistency of the items (Hill and Hill, 2008) used to analyze the constructs related to the consumption experience, which were adapted from Oh *et al.* (2007), Park *et al.* (2010), and Kastenholz, Loureiro, Marques and Carneiro (2012). These analyses were implemented using IBM SPSS 20.0 (Statistical Package for the Social Sciences) software. The frequency analysis of the words related to sensory impressions mentioned in the open-ended question was conducted using the software IBM – SPSS Text Analytics for Surveys 4.0. With respect to the free expression responses, words/expressions were included in the analysis if they were referred to by at least 5% of the respondents and corresponded to at least 3% of the total of the words mentioned (Reilly, 1990).

4. RESULTS

Of the total sample, 65% of the respondents are female and 35% are male. The average age of the participants is 35 years with a standard deviation of 11 years. The respondents are predominantly employed (75%) and single (52%), reside in local municipalities (Loulé: 36%; Faro: 25%) and had visited the market three or more times (54%).

The items adapted from the literature to assess the four dimensions of the consumption experience proposed by Pine and Gilmore (1998) seem to be reliable, because all of the measures have a Cronbach's alpha higher than 0.7 (Table 1). The results reveal that the frequencies that are higher in the response categories of “strongly agree” and “strongly positive” (higher than 80%) are related to the aesthetics dimension (“Just being there was very pleasant” [98.1%]; “I felt a real sense of harmony” [91.5%]) and to the entertainment realm (“The activities of others were fun to watch” [86.8%]; “Watching the activities and the environment was captivating” [83.0%]).

Most of the respondents claim to remember many positive aspects of the Querença Market (93.4%), and most believe that they will not forget their experience at the event (84%). The respondents are also satisfied with the organization of the event (95.3%). Furthermore, the majority of visitors state that the experience was interesting (88.7) and stimulating (81.1%). While in general, the participants are satisfied with the market organization (95.3%), 52.8% of the participants mention the intention to return to the market in the near future, and 67% are willing to recommend it to other people.

Table 1 - Analysis of the visitor experience at the Querença Market

Constructs/items	% Agree+ strongly agree	Median	Cronbach's Alpha
Education The experience stimulated my curiosity to learn new things The experience has made me more knowledgeable I learned a lot It was a real learning experience	73.6% 70.8% 69.8% 61.4%	4 4 4 4	0.89
Aesthetics Just being there was very pleasant I felt a real sense of harmony The market was elaborate and meticulous The market was very attractive	98.1% 91.5% 64.1% 22.6%	4 4 4 3	0.72
Entertainment The activities of others were fun to watch Watching the activities and the environment was captivating I enjoyed watching activities performed by others at the market I enjoyed being one of the visitors at the market	86.8% 83.0% 78.3% 35.8%	4 4 4 3	0.76
Escapism I was completely immersed in this market I felt I was at a totally different place and time at this market This market made me feel like I was in a different world I could imagine I was a different person at this market	66.0% 55.7% 37.8% 28.3%	4 4 3 3	0.85
Arousal My experience was interesting My experience was stimulating My experience was exciting My experience was enjoyable	88.7% 81.1% 51.9% 50.9%	4 4 4 4	0.78
Memory I remember many positive things about this market I won't forget my experience at this market I have wonderful memories about this market	93.4% 84.0% 55.7%	4 4 4	0.83
Intention to revisit I will revisit this market at the next date or the following	52.8%	4	-
Intention to recommend I will recommend this market to other people	67.0%	4	-
Overall satisfaction Overall, I am satisfied with the market organization	95.3%	4	-

Source: Own elaboration

When asked to what extent the different human senses contributed to a positive experience at the Querença Market (Table 2), 91.5% of the respondents strongly agreed that the sense of taste contributed the most, followed by smell (81.1%), touch (68.0%), sight (28.3%) and hearing (17.0%).

Table 2: Contribution of the five senses to a positive experience

Senses	Agree + strongly agree	Median
My sense of taste was stimulated (flavors)	91.5%	4
My sense of smell was stimulated (smells)	81.1%	4
My sense of touch was stimulated (textures)	68.0%	4
My sense of sight was stimulated (colors, objects...)	28.3%	3
My sense of hearing was stimulated (sounds)	17.0%	3

Source: Own elaboration

When asked to freely express the sensory impressions associated with their experience at the Querença Market, the participants recalled sensory impressions (Table 3) related to gastronomy (18%), agricultural products (17%) and people (12%).

Table 3: Sensory impressions related to the visitor experience

Sensory impressions	% of the 365 mentioned words	% of respondents
Gastronomy (bread, cakes, sweets, charcuteries, ice cream)	18%	39%
Agricultural products (honey, seeds, aromatic herbs, fruit, vegetables)	17%	35%
People (families, local people)	12%	32%
Animation (folkloric group, <i>tuna</i> , music, theater play)	7%	18%
Textures (agricultural products, cork, wool, wood, water)	6%	14%
Nature (land, landscape, dew, mountain range, water)	5%	12%
Beverage (tea, distilled spirit (<i>aguardente</i>), liqueurs, cocktails)	3%	10%

Source: Own elaboration

5. DISCUSSION

The adaption of the scale proposed by Oh *et al.* (2007) based on the experiential theoretical approach by Pine and Gilmore (1998) seems to be appropriate to analyze an event such as the Querença Market. Accordingly, the main finding is that “aesthetics” and “entertainment” are the dimensions that prevail in the consumption experience at the Querença Market, as perceived by visitors.

The “entertainment” component is related to the nature of the event itself, which people want to enjoy, the social component being one of the strong pillars of the project. The “aesthetic” domain is classified as passive immersion in the physical environment. This form of experience is encouraged by the location of the event, which differs from the urban scenario (Quadri-Felti and Fiore, 2012). In addition, diverse sensory-informed activities are offered during the market in an open area characterized by nature and historical heritage, and surrounded by a mountain range landscape. This result is in line with other studies conducted in rural areas, in which the aesthetic experience is highlighted (Kastenholz, Loureiro, Marques and Carneiro, 2012).

The escapism dimension was the one that obtained a lower level of concordance, meaning that, in general, the individuals were not completely absorbed in the activities, a process requiring active participation. Therefore, despite the existence of themed workshops at the market, they did not seem to fully engage visitors, which can partially be explained by the short duration of the event (approximately three hours) and by the fact that some of the participants found themselves in a place that was too close to their everyday life.

Overall, the participants were satisfied with their experience at the Querença Market, and they claimed that their experience was interesting and stimulating. However, only slightly over half of the visitors (52.8%) are willing to return to following occurrences of the event. One possible reason for this finding is that the market is not yet perceived as having the potential to continue to be surprising in the future. In fact, the surprise factor is an important aspect in facilitating memorable consumption experiences and loyalty (Tung and Ritchie, 2011).

With respect to the sensory component of the consumption experience, the senses of taste and smell were the most referenced by visitors as contributing to a positive experience at the Querença Market, which suggests the importance of gastronomy to the event. This idea is somewhat confirmed in the open-ended answers, where the most mentioned words/expressions related to the market regard gastronomy. This sensory impression is also highlighted in other studies on consumption experiences in rural areas (Agapito *et al.*, 2014; Gretzel and Fesenmaier, 2010; Kastenholz and Lima, 2011).

Curiously, it is worth noting that the senses of sight and hearing are the least cited as enhancing the visitors' experiences. Although some studies show that the sense of sight is not significantly predominant in consumption experiences in rural areas, the importance given to sight by the respondents has tended to be higher than in the present study (Agapito *et al.*, 2012; Gretzel and Fesenmaier, 2010). Nevertheless, the focus on the senses of taste and smell in this research is not surprising, because the specific event under study is a market, which is especially centered on local products related to food and to other non-visual senses.

The same idea applies to the haptic sense, because the participants considered that touch highly contributed to a positive experience at the Querença Market. Conversely, empirical studies on visitor experiences concluded that touch-based stimuli are those that are the least optimized by rural managers and marketeers (Agapito *et al.*, 2012, 2014). This finding can be somewhat explained by the fact that, at the Querença Market, the visitors have the opportunity to touch food-related products and to participate in workshops focusing on hand-based work and on experiencing textures. Also, the clear reference to people, particularly to local people, as a sensory impression, confirms that the project is focused on community interaction. In fact, recent research stresses the importance of the social dimension for positive visitor experiences that endure in the memory and contribute to the sustainability of local destinations (Manente and Minghetti, 2006).

6. CONCLUSION

This study followed the experiential approach suggested by Pine and Gilmore (1998) in their framework for managing consumption experiences, which is based on four dimensions. The research intended to characterize the consumption experience of visitors to the Querença Market and to understand the elements or features that contribute to the creation of the conditions that enhance their consumption experiences.

Although the event is most related to "aesthetics" and "entertainment," more than 50% of the participants associate educational and escapism characteristics with the Querença Market. This suggests that the physical environment and the social component of the

project are strong elements, though because the other features are also present at the event, the idea of the “sweet pot” proposed by Pine and Gilmore (1998) can be managed in order to enrich consumer experiences. From a managerial perspective, the educational and escapism features should be enhanced, because these are the dimensions requiring a higher level of participation and immersion, and they are engaging processes that facilitate positive outcomes such as long-term memory and loyalty (Oh *et al.*, 2007; Tung and Ritchie, 2011). Furthermore, efforts should be put into the existing workshops and related activities with a view to providing the most appropriate conditions to most effectively encouraging repeat visits.

Under the experience economy paradigm, it is also important to analyze the way in which consumers physically interact with the different environments (Krishna, 2012; Pine and Gilmore, 1998; Schmitt, 1999); such is the case of the Querença Market. Indeed, this event can be associated with particular sensory qualities that can be used to reinforce the event brand, alter the product offerings, as well as consolidate the communication strategies with the help of new technologies. In fact, the visitors revealed that certain sensory impressions were the most prevalent in their consumption experiences, in particular: “gastronomy” (bread, cakes, sweets, charcuteries, ice cream), “agricultural products” (honey, seeds, aromatic herbs, fruit, vegetables) and “people” (families, local people). On the one hand, the Querença Market should dynamically focus on creatively facilitating unexpected experiences through stimulating different senses. On the other hand, because the market is not predominantly perceived as visual, there is an opportunity to enhance the experiences of sensory impaired people and to continuously co-create experiences with visitors and locals (Agapito *et al.*, 2014).

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PLACING SOCIAL MARKETING IN THE PRACTICE OF CORPORATE SOCIAL RESPONSIBILITY: FOCUSING ON ENVIRONMENTAL ISSUES

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Patrícia Pinto

ABSTRACT

As the awareness of social problems and environmentally related issues in particular becomes widespread, companies have been called to participate in the resolution of these, given that they are the main economic agents with impacts on the society and on the environment. Considering that corporations face pressures from their stakeholders to contribute to solving the social global issues that are affecting them, this theoretical paper analyses the role of stakeholder theory, a new management paradigm, and the importance of social marketing to achieve the aims of corporate social responsibility (CSR). The key point of this study is the possible contribution of social marketing to ensuring the companies' voluntary involvement in promoting social and environmental well-being, supporting them to respond to stakeholders' requests, due to its capacity of providing, over time, quantifiable improvement on social issues. In this context, this study explores the linkage between stakeholder theory, CSR and social marketing concepts, giving particular attention to the social marketing contribution to solving environmental issues.

Keywords: Stakeholder Theory, Corporate Social Responsibility, Social Marketing, Environmental Issues

JEL Classification: M310, M140

1. INTRODUCTION

Since society has gained more awareness of social issues, including environmental and natural resources protection, pressures on corporations have increased to make them more prone to adopt sustainable behaviors (Lowe, Lynch and Lowe, 2015; Wei and Lu, 2015). This means that contemporary corporations have been called to commit on global social and environmental purposes to guarantee society's well-being, including environmental protection. In this sense, corporations, especially the "giants" that influence the lives of millions of people, need to assume an ethical position towards society and the environment, the so-called social contract (Donaldson, 1982).

While classical management theories focus on companies' shareholders (stockholders) as the only interested party to whom the company needs to justify its performance (Friedman, 2007), the postmodern stakeholder paradigm considers a wide-ranging view of the corporation's diverse stakeholders, considering that value creation is only ethical and nowadays possible when respecting not only shareholders' ambitions but other stakeholders' needs as well. In fact, stakeholders are "groups or individuals that can affect or be affected" by corporation actions (Freeman, Harrison, Wicks, Parmar and Colle, 2010). As stated by

Freeman *et al.* (2010: 27), “no stakeholder stands alone in the process of value creation. The stakes of each stakeholder group are multifaceted and inherently connected to each other”. Accordingly, companies need to build effective relations with their stakeholders, including satisfying their requests regarding environmental and social issues. These practices, in turn, enable the company to commit on corporate social responsibility (CSR) (Cantrell, Kyriazis and Noble, 2015). Given its ability to provide support on complex social issues, social marketing (SM) can be considered as a capable CSR initiative to respond to stakeholders’ needs. This happens because SM is focused on influencing behavior changes towards society’s well-being, including improvements in the environment, while monitoring the programs’ results (Kotler and Lee, 2005a, 2005b; Saraiva, 2012; Lowe et al., 2015).

Within this context, this theoretical paper aims to understand the role of SM in the practice of CSR. More specifically, this study is intended to provide bases to distinguish the concepts of stakeholder theory and CSR, CSR and SM, while giving insights about how they converge. Particular attention is given to the contribution of SM to solving environmental issues. Although it is known that the SM in corporate context aims to meet part of CSR objectives (Kotler, 2005a, 2005b), there is still scant literature positioning the discipline in this process. For that reason, this study intends to bring key aspects to this discussion, guided by an attempt to answer the following question: How can SM answer stakeholders’ requests, contributing to meeting part of CSR objectives?

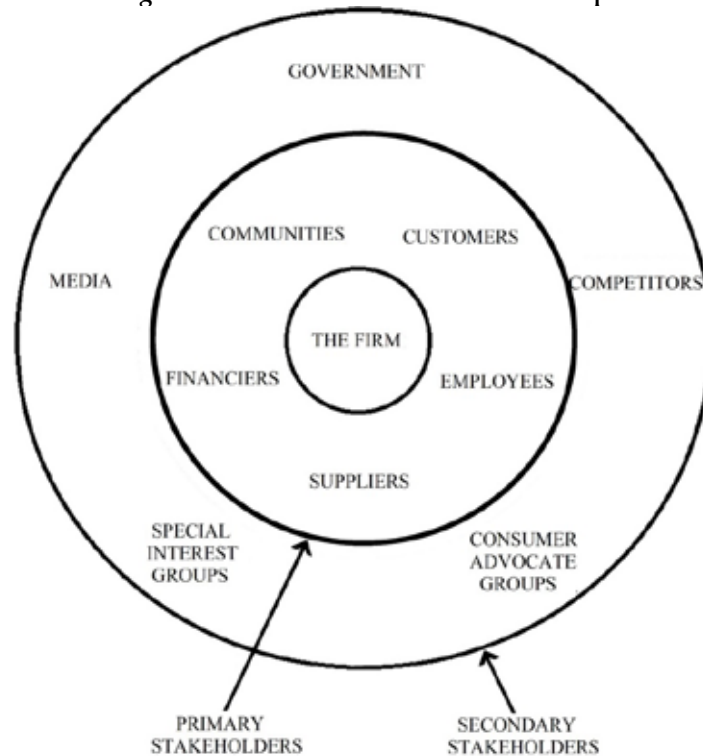
2. THEORETICAL BACKGROUND

2.1. Stakeholder theory: a postmodern management paradigm

Nowadays, literature shows that companies must be concerned with “People”, and environment (“Planet”), besides financial issues (“Profits”), the three Ps of the sustainability concept, since all these aspects are linked and are the triple bottom line of sustainable management. Sustainable management, in turn, considers the needs and the requirements of all the company’s stakeholders (Rego, Pina e Cunha and Ribeiro, 2013). In this sense, a stakeholder can be defined as “[...] any group or individual who can affect or is affected by the achievement of a corporation’s purpose” (Freeman, Harrison and Wicks, 2007: 6). According to Rivera (2004) the most important stakeholders on environmental issues are usually consumers, government agencies, the media, industry associations and environmental groups. However, there are diverse ways of thinking about the correct corporate relation with the various stakeholders, as these groups affect the company in different ways. For that reason, they can be divided into primary stakeholders, i.e. those the company cannot survive without, and secondary stakeholders, i.e. those that can influence or be influenced by the company but without compromising its existence. Some managers consider that companies must be concerned with all of them, although putting particular attention on the former; other managers state that the secondary stakeholders only have importance if they affect the interests of the shareholders (stockholders) (Rego *et al.*, 2013). Nevertheless, the importance of specific groups varies from company to company. For instance, environmentalists, as secondary stakeholders, can affect the relation between the corporation and the community or between the corporation and a segment of customers; however, a specific company can have the environmentalists, or others from the external circle (Figure 1), as a primary stakeholder (e.g. toxic waste disposal businesses) (Freeman *et al.*, 2007). Moreover, Freeman *et al.* (2007) consider that, in a free economy, the community must be amongst the principal (primary) stakeholders (Figure 1), just as the customers, employees, suppliers and financiers, emphasizing that these are the groups that affect, or are affected, by most businesses. In turn, the secondary stakeholders “can affect or can be affected” by the accomplishment of

a corporation's mission as well. They essentially have the ability to influence the relation between the primary stakeholders and the corporation.

Figure 1. Basic Two-Tier Stakeholder Map



Source: Adapted from Freeman *et al.* (2007: 7)

According to stakeholder theory, companies need to manage the relationship between all the diverse groups (stakeholders) that have a connection to corporations' activities, including shareholders (stockholders), customers, suppliers, employees, communities and others. Therefore, companies must create value when interacting with them, guaranteeing that everybody continually wins over time (Donaldson, 1982; Carroll, 1991; Freeman *et al.*, 2007; Freeman *et al.*, 2010; Freeman and Moutchnik, 2013). This perspective contrasts with the classical paradigm, which argues that the manager must act only in the interest of the shareholders (stockholders) (Friedman, 2007). In this sense, Freeman *et al.* (2010) suggest that Friedman's thought is compatible with stakeholder theory, because both paradigms are concerned with the interests of the shareholders. Still, there is an important difference between them. While Friedman focuses on maximizing profits, the authors believe that the most important is satisfying the stakeholders' interests, creating value for all, and thus maximizing value in a sustainable way. As referred by Freeman and colleagues (2007: 4), "the idea that we need to pay attention to only one of these groups, the people that supply the capital (stockholders or financiers [shareholders]), if we want to build and sustain a successful business, is deeply flawed."

2.2. From stakeholders theory to corporate social responsibility

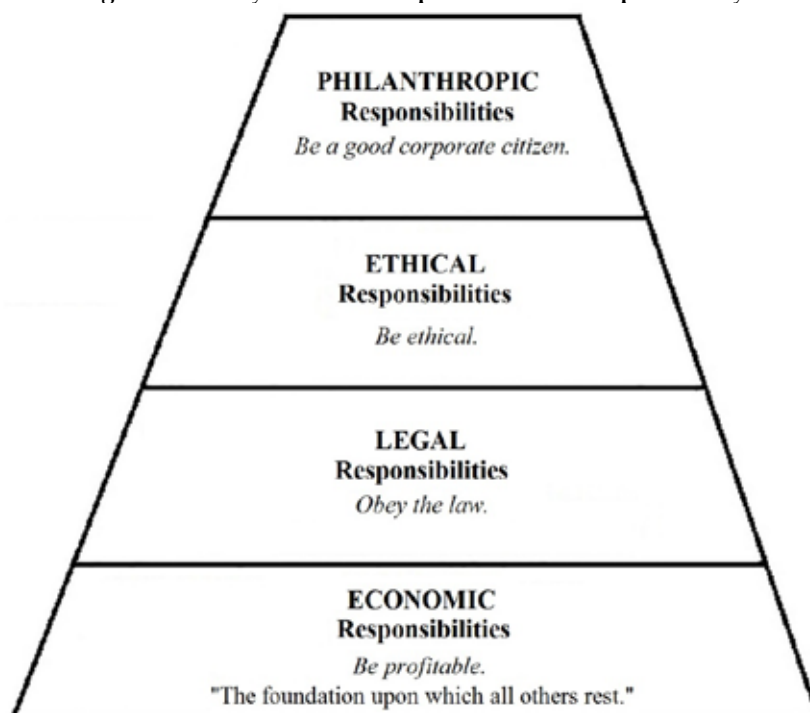
Stakeholder management has an accepted linkage with CSR (Freeman, 1984; Carroll, 1991). The concept of stakeholder was first mentioned in the Stanford Research Institute in 1963 and was spread in strategic management literature, including CSR (Freeman, 1984). According to Freeman (1984), a distinguished aspect of CSR literature is the application of

the stakeholder concept to the non-traditional stakeholders, providing more relevance to the public, to the community, or to the employees.

The CSR philosophy has its roots in the 1960s when activist groups advocated more corporate responsibility. It gained visibility in the 1970s as the result of legislation allowing public policy to recognize the environment, the communities and consumers officially as stakeholders (Carroll, 1991). As a consequence of the social movements of the 1960s and 1970s, including environmentalism and other issues, the predominant business mindset towards society has changed, motivating corporations to align their actions with the external environment (Freeman, 1984). Environmentalism started in the nineteenth century as an intellectual doctrine of the higher social classes, not based on an ethic perspective of protecting the earth as a whole, but to allow landowners to protect their own lands. It reappeared in a changed way in the later 1960s and early 1970s when youths started defending less consumerism in opposition to a corporate culture only oriented to profit (Silverstein, 1993). So, environmentalism gained status and Earth Day was celebrated for the first time in 1970, an important year for the development of environmental legislation as well (*Ibidem*). As markets became more global and open, environmentalism awareness increased and came to stay in a global way. In particular, the Kyoto protocol on global warming confirms how environmental issues are currently affecting life (Freeman *et al.*, 2007).

Freeman and Moutchnik (2013) suggest that if the business is oriented through a “creating value for all stakeholders” perspective, the CSR concept would not be necessary. Freeman, well known for his work on stakeholder theory, finds that CSR moves too much away from the economic aspect of the company. Consequently, instead of separating the “social issues” from business it is necessary to comprehend the links between economic and social strengths (Freeman, 1984). In this sense, Carroll (1991) proposes a pyramid, including the four basic characteristics of CSR, recognizing the importance of the economic responsibility aspect, positioned on the bottom, followed by the legal, ethical and philanthropic responsibilities (Figure 2).

Figure 2. The Pyramid of Corporate Social Responsibility



Source: Adapted from Carroll (1991: 42)

As indicated by this author, CSR should attempt to make a profit, obey the law, be ethical, and be a good corporate citizen (Carroll, 1991). In this sense, CSR is in accordance to the classical thought of Milton Friedman according to which management intends “to make as much money as possible while conforming to the basic rules of society, both those embodied in the law and those embodied in ethical custom” (Friedman, 2007: 173–174). In fact, this quote includes almost all CSR aspects – economic, legal and ethical – although it excludes the philanthropic aspect, which fulfills CSR (Carroll, 1991).

Nevertheless, Kotler and Lee (2005b) explain that today corporations are called to engage in more strategic formats, being CSR much more than philanthropy, the most traditional form of this concept, which consists in direct donations to a charity or a cause. These authors point out that CSR has evolved to a more strategic perspective, aligning with the companies’ search for competitive advantage. Thus, today CSR is considered a management process that allows managing key stakeholders, supporting their interests while accomplishing company strategy (Cantrell *et al.*, 2015). For instance, Keith Weed, the chief marketing and communications officer at Unilever, goes further and states that Unilever abolished the CSR department because they need to move beyond traditional CSR initiatives to more dynamic approaches that, in fact, create a more sustainable world while improving company performance (World Economic Forum, 2012) (see how Unilever says it is committed on improving people’s well-being and the environment through a corporate social marketing approach on point 3.1). In this sense, Unilever brands are committed to the 17 United Nations Global Goals for Sustainable Development, and mention specific goals that are already being worked towards, including Goal 13 for climate action, Goal 3 for good health and well-being, Goal 6 for clean water and sanitation, Goal 2 for zero hunger and Goal 15 for life on land (Unilever, 2015).

Following this dynamic perspective, from the six major types of CSR initiatives mentioned by Kotler and Lee (2005b) – cause promotions; cause-related marketing; corporate philanthropy; community volunteering; socially responsible business practices; and social marketing – we highlight the importance of social marketing implemented by corporations – corporate social marketing (CSM). Actually, CSM initiatives have been providing effective solutions on complex social issues due to their focus on programs able to influence behavior changes towards improving the environment and/or society’s well-being, allowing companies to answer to stakeholders’ requests while improving corporate performance (Bezirgan, Beall, Wayman and Briggs, 2012). Since CSM applies the SM concepts and principles to companies, the next section is dedicated to these concepts and principles.

2.3. From social marketing to corporate social marketing

2.3.1. *Origin and concept of social marketing*

As social problems became more complex in developed and developing countries, social campaigns were designed with the aim of providing solutions in light of the socioeconomic and cultural context in which these problems were felt. Examples include the recognition of segments of society especially vulnerable to some diseases, engaging in risky behaviors (such as consuming drugs) or with unfair social systems (child labor, for instance) (Novartis foundation for sustainable development, 2003). Within these frameworks, social campaigns have been developed and implemented, enhancing society’s awareness towards these problems and identifying their major roots. Most of these campaigns relied on large-scale information – which can be enough in creating public consciousness and even in changing attitudes – but that rarely turned out to be effective in changing behaviors, most of them shaped by old habits, beliefs and values (McKenzie-Mohr, Lee, Schultz and Kotler, 2012).

The failure of most of these initiatives and the success of marketing in the commercial sector were the underlying forces for the witnessing of social marketing during the 1970s.

This concept was first defined by Kotler and Zaltman as “the design, implementation and control of programs calculated to influence the acceptability of a social idea and involving considerations about product planning, pricing, communication, distribution and marketing research” (Kotler and Zaltman, 1971: 5).

Kotler and Zaltman (1971) proposed that social marketing, as generic marketing, should not be perceived as a theory in itself but rather as a framework that combines insights from many bodies of knowledge (such as psychology, sociology, anthropology and communication) with the aim of changing people’s behavior. The idea of extending the domain of marketing to the resolution of social problems was initially questioned in the studies of Lacznia, Lusch and Murphy (1979), Lacznia and Michie (1979) and Luck (1974), but some successful experiences in the early applications of social marketing, especially in family planning campaigns or in disease prevention programs, provided the needed incentive to the development of this marketing framework. From the 1980s to the present, academics have been no longer concerned whether the traditional marketing principles and tools can be applied to solve generic social issues but, instead, how to use them to encourage socially desirable behaviors in issues such as health (e.g. tobacco use prevention, breast cancer prevention, HIV/AIDS prevention, eating disorders), injury prevention (e.g. traffic safety, bullying, safe gun storage), environment (e.g. energy and water conservation, air pollution reduction from automobiles and other sources, increased recycling, decreasing littering, wildlife habitat protection, prevention of forest destruction), community involvement (e.g. voting, animal adoption, literacy) and financial well-being (e.g. preventing bankruptcy and fraud) (Kotler and Lee, 2005a, 2015b).

Since the concept of social marketing advanced by Kotler and Zaltman (1971), many other definitions have been proposed (Lefebvre and Flora, 1988; Andreasen, 1995; Smith, 2000; Dann, 2010; Kotler and Lee, 2015a). As an example, Andreasen defines social marketing as “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 society” (Andreasen, 1995: 7). Regardless of the specificities of the suggested definitions, the focus of social marketing rests on changing behaviors in order to improve the well-being of the whole society. As explained by Bloom, Hussein and Skykman, as long as this is the most important objective, a program fits the definition of social marketing, “even if increasing sales or improving the corporate image is a secondary goal” (Bloom, Hussein and Szykman, 1995: 10).

2.3.2. Comparing social marketing with commercial marketing

Although social marketing has much in common with the traditional marketing of products (goods and services), usually referred to as “commercial marketing”, their final aim is a fundamental difference between them. While commercial marketing mainly looks for the maximization of the company’s profit, the bottom line of social marketing is the change of behavior that could enhance society’s welfare (Kotler and Lee, 2015a). However, both marketing approaches aim to influence human behavior. In the case of commercial marketing, this implies conducting consumers to buy the good or service offered by the company, whereas in the social context it involves the engagement in a socially desirable activity. Secondly, neither social marketing nor commercial marketing is interested in a one-time behavior but rather in retaining consumers over time. This means the adoption of some lifelong socially beneficial behavior, in the case of social marketing, and repeated sales, in the case of commercial marketing. Thirdly, both marketing frameworks accept that human behavior is voluntary and affected by rewards, which implies that any attempt to change behavior must be persuasive, instead of coercive, and offer a valuable return for the consumer. Thirdly, either in the social or in the commercial marketing setting, the

importance of the social environment that involves each human being, as a determinant of his/her behavior is recognized. Still, as MacFadyen, Stead and Hastings (1999) explain, in social marketing “the products [the behavior change] tend to be more complex, demand is more varied, target consumers are more challenging to reach, consumer involvement is more intense and the competition is more subtle and varied” (MacFadyen *et al.*, 1999: 4). Finally, as in commercial marketing, social marketing also has a marketing mix. The *product* in a social marketing context, is the new behavior that the audience should adopt. *Price*, in turn, represents what target audience must give up to receive the social marketing program’s benefits and, unlike in commercial marketing, price goes beyond monetary costs. *Promotion* includes all forms used to persuade the target audience to adopt the new behavior and *place* refers to the distribution channels or created systems through which the “products” are available for consumers.

2.3.3 Social marketing and pro-ecological behaviors

Due to the internationally recognized increase in environmental problems, and the global increase in environmental awareness, social marketing for the environment is slowly moving towards “the maturity stage” (Takahashi, 2009: 143). This means that the research on the application of social marketing in fostering pro-environmental behaviors such as climate change, recycling and water conservation is rising as public environmental issues are having an increased stake (e.g. Valle, 2004; Kotler and Lee, 2015; Lowe *et al.*, 2015). Takahashi (2009) investigated 62 scientific articles concerning the application of social marketing on environmental issues and points out recycling as the most studied issue (18%), followed by energy conservation (8%). Gynther, Mikkonen and Smits (2012) suggest that changes in consumer behavior can bring energy savings of about 20%.

McKenzie-Mohr *et al.* (2012) clearly offer a comprehensive approach on the application of social marketing principles in encouraging environmentally responsible behaviors. These authors present the blend of social marketing with community-based social marketing (CBSM) as a more effective strategy to foster general sustainable behaviors. The CBSM process encompasses four stages: “(1) Identifying barriers to a sustainable behavior; (2) Designing a strategy that utilizes behavior change tools; (3) Piloting the strategy with a small segment of a community; and (4) Evaluating the strategy once it has been implemented across the community” (McKenzie-Mohr, 1999: 1). The website of CBSM (www.cbsm.com) (CBSM, 2006–2010) enables visitors to consult abstracts of studies on a wide variety of sustainable behaviors: composting, energy efficiency, hazardous waste, pollution prevention, reuse, recycling, source reduction, transportation, and water saving.

2.3.4 Social marketing and corporate social marketing

Nowadays, consumers are naturally more receptive to implementing behaviors in their lives that lead to the improvement of the environment, either because of environmental concerns or due to the need to adopt a more frugal lifestyle as a result of the recent financial crisis (Kotler, 2011). In this perspective, CSM programs reveal an opportunity, due to their focus on behavior change, for corporations as they have an augmented responsibility facing the new environmental challenges and society’s quality of life, while, at the same time, consumers are buying more from companies that care and are more aware of these societal concerns (Kotler, 2011).

According to the renowned International Advertising, Marketing and Public Relations Agency (Bezirgan, 2012: 17), “the utility of corporate social marketing is far-reaching and can be used to engage with a wide variety of audiences and stakeholders from consumers to customers to employees – to tackle many business challenges in socially beneficial ways.”

In this sense, social marketing is distinguished from other CSR projects because it involves enterprise, customers, stakeholders and society at large, inviting all parties, over time, to benefit from a positive and socially desired behavior change (Kotler and Lee, 2005a, 2005b; Du, Sen and Bhattacharya, 2008).

CSM programs can be enhanced by corporate partnerships with ONGs or public agencies that have know-how regarding social issues, since the corporation can get specialized support but also the opportunity to better reach out to the community and increase program credibility (Kotler and Lee, 2005b). Moreover, the corporation gives essential support to the program as well, through their marketing skills, access to distribution channels, money, employee volunteers, and in-kind contributions, providing a synergy that allows, more than other CSR initiatives, to impact large populations (Kotler and Lee, 2005b). However, the corporation must be ready for a long-term program, for the purpose of implementing the behavior change. Besides, CSM programs should preferably be aligned with the company's products or services since the company expertise on the issue benefits the program and gives more credibility both to the program and the company. Nevertheless, the most important thing to avoid is a contradictory linkage, like a fast food chain promoting healthy eating habits (Bloom *et al.*, 1995).

Following what has been referred, the use of the SM process in the corporate context supports the accomplishment of CSR, benefiting society and the environment, but also the company performance, through behavioral change programs whose results can be measured. For this reason, several companies and marketing and communication agencies are using the CSM process to develop and/or implement programs on environmental issues as part of the strategy to fulfill corporate responsibility towards the environment or sustainability. As example, two programs that use the SM approach in the corporate context are briefly described below. They belong to companies from different business areas: the Unilever business in fast-moving consumer goods (FMCG) (food, toiletries, home, etc.); and the Brazilian power companies' business (regarding electricity). Both programs have environmental and general well-being implications and are having considerable success in accomplishing their goals.

3. CORPORATE SOCIAL MARKETING EXAMPLES

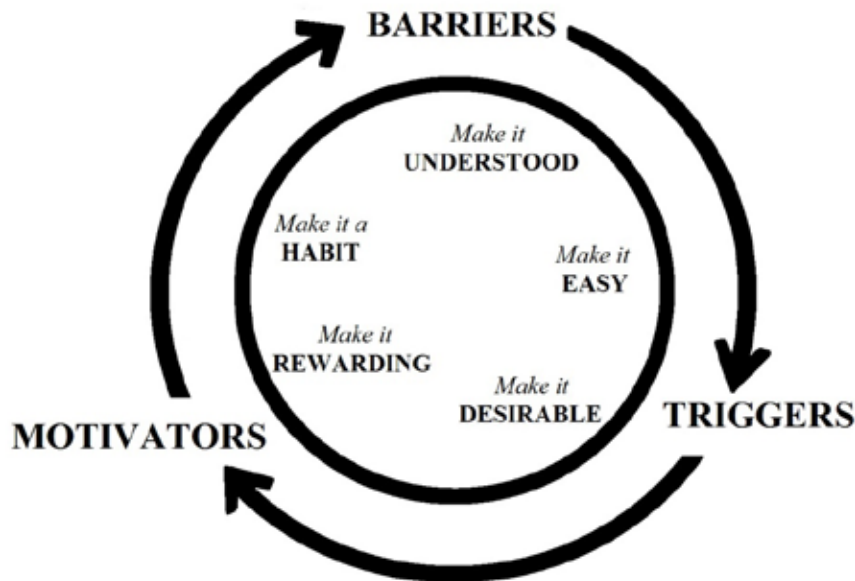
3.1. Unilever's five levers for change

Unilever is a global corporation "whose products are used over two billion times a day in over half the households on the planet" (Unilever, n.d.b:4). For that reason Unilever is committed to sustainable living, believing that in order to have a sustainable future not only governments and industries have to change, but citizens have to be committed too (Unilever, n.d.a). Therefore, Unilever uses marketing, and market research in particular, to encourage behavioral changes, and owns its own model of behavior change, the Unilever's Five Levers for Change, which is used by the company to accomplish the goals of the so-called Unilever Sustainable Living Plan. This plan enables the company business to advance while benefiting society. With the Five Levers for Change approach, Unilever wants to change the lives of millions of people, improving the quality of life in various aspects, including environmental issues. The first step of the model consists in identifying consumers' "Barriers", i.e. "the things that **stop** people from adopting a new behavior"; "Triggers", i.e. tips to "get people to **start** a new behavior" and "Motivators", i.e. "the ways to help them **stick** with the new behavior". Then, Unilever uses all the information picked and applies each of the five levers to encourage behavior change (Unilever, n.d.a):

1. Make it understood: "Do people know about the behavior?"; Do they believe it is relevant to them?";

2. **Make it Easy:** “Do people know what to do and feel confident doing it?”; “Can they see it fitting into their lives?”;
3. **Make it Desirable:** “Does the new behavior fit with their actual or aspirational self-image?”; “Does it fit with how they relate to others or want to?”;
4. **Make it Rewarding:** “Do people know when they are doing the behavior ‘right’?”; “Do they get some sort of reward for doing it?”;
5. **Make it a Habit:** “Once people made a change, what can we do to help them keep doing it?”

Figure 3. Unilever’s Five Levers For Change



Source: Adapted from Unilever (n.d.a.)

According to Unilever (n.d.b), the Unilever Sustainable Living Plan reached 224 million people by the end of 2012 (two years in a ten-year plan) with safe drinking water, reduced greenhouse gases by 6% across the value chain and training of around 450,000 smallholder farmers in the process of sustainable agriculture.

3.2. PROCEL in the schools

In Brazil, all electric trading and power producing companies must implement energy efficiency (EE) projects, from diverse categories, in the communities in which they operate, as a requisite from the regulator entity of the sector. Particularly, energy efficiency behavior change programs are considered a way of improving stakeholder relations, because they are diminishing electricity consumption, which leads to environmental protection. This issue is a stake for groups such as communities, consumers, environmentalists, governments and even stockholders, since they can manage the energy stock in a profitable way (Saraiva, 2012).

A recent study (Saraiva, 2012) identified that all power companies implementing the EE programs, focusing on behavioral change for the child and youth public, were applying the methodology PROCEL in the schools, which means that these energy efficiency programs were conducted through a partnership with the government. PROCEL in schools is an approach recommended by the entity that regulates the power sector in Brazil, when companies choose to implement behavioral change programs for the child and youth target.

The fact that power companies choose to use the PROCEL methodology means recognition of the importance of partnership with the government. The PROCEL methodology comprises books for teachers and students of different levels, educational instruments, an educational game, video films, and a briefcase and annotation papers for monitoring and evaluation purposes (PROCEL in schools, n.d.). It is a program with measured results calculated by the power companies in partnership with schools and PROCEL.

The consumption avoided for the interval time 1995–2006 obtained the value of 2,700,000 MWh, equivalent to the average annual consumption of 1,100 Brazilian households, having reached 18 million students, which reflects the effectiveness and success of the program as time goes by. “The multiplication of necessary changes, new concepts and postures, is facilitated through institutional partnerships” (PROCEL in schools, 2011: 12) between government, private groups for distribution of electricity, and schools. The program is monitored at national level, while each power company, along with the community schools, monitors and measures their results from the program effort, consisting of techniques for assessing the program results (PROCEL in schools, 2011).

4. CONCLUSION

Social marketing as a process that uses the mainstream marketing to change behaviors in order to benefit society and/or the environment, when applied in the corporate context, enables the company to manage and to build relationships with stakeholders. In fact, to establish a “dialogue” with stakeholders is the “condition sine qua non” for contemporary companies to operate. Social marketing gives answers to the stakeholders’ requests, including on environmental issues such as climate change, recycling, water conservation, pollution, etc. In conformity, as an interactive process, it enables the corporation to engage clients in the practice of positive behavior changes and, therefore, it meets part of the current dynamic purposes of CSR.

This study presented two examples of CSM programs focused on environmental issues as this article addresses the SM-focusing environmental issues. However, these programs can be applied to other relevant topics such as public health, public safety, education, community issues, etc. Nevertheless, the type of behavior change program followed by the company should preferably be aligned with the corporate business and with their mapped stakeholders’ needs, while preserving corporate veracity on benefiting social interests. Moreover, corporate partnerships with NGOs or public agency specialists in social issues can improve CSM programs, ensuring tangible results for society, but also gains for the company, resulting in a win-win perspective.

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Do not use footnotes or endnotes as a substitute for a reference list.

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To format reference list use size 11, regular, left aligned.

Ideally, the names of all authors should be provided, but the usage of *et al.* in long authors list will also be accepted.

Ex: Pierzynski, G. *et al.* (1994). *Soils and environmental quality*. Lewis Publishers. Florida.

Scientific Article:

Last name of the author, First initial. (Publication year). Article title. *Title of the Journal or Review*.

Volume(Issue): first page-last page.

Ex: Sadiq, M. and Alam, I. (1997). Lead contamination of groundwater in an industrial complex. *Water, Air and Soil Pollution*. **98(2)**: 167-177.

Book:

Last name of the author, First initial. (Publication year). *Book title*. Additional information. Edition number, Publishing house. Publishing place.

Ex: Costa, J. (1995). *Caracterização e constituição do Solo*. 5th edition, Foundation Calouste Gulbenkian. Lisbon. ISBN: 000 000 000 0000

Book Chapter:

Ex: Silko, L.M. (1991). The man to send rain clouds. In: W. Brown and A. Ling (eds.), *Imagining America: Stories from the promised land*. Persea. New York.

Online Document:

Last name of the author, First initial. (Publication year). *Document title*. Accessed in: day, month, year, in: URL.

Ex: Chou, L., McClintock, R., Moretti, F. e Nix, D.H. (1993). *Technology and education: New wine in new bottles – Choosing pasts and imagining educational futures*. Accessed in 24th of August 2000, on the Web site of: Columbia University, Institute for Learning Technologies: <http://www.ilt.columbia.edu/publications/papers/newwine1.html>.

Dissertation:

Ex: Tingle, C.C.D. (1985). *Biological control of the glasshouse mealybug using parasitic hymenoptera*. Ph.D. Thesis. Department of Biological Sciences, Wye College, University of London. 375 pp.

Tables, Figures, Graphics and Boards:

All tables, figures, graphics and boards are to be numbered using Arabic numerals and should have a title explaining its components above the body, using size 9, bold, centred.

The source and year of the information given in tables, figures, graphics and boards should be included beneath its body, centred, size 8, regular. For tables and boards contents use size 8.

Figures and graphics must be in JPEG format (image).



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