

A Work Project, presented as part of the requirements for the Award of a Master's Degree in
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A CSR and communication strategy for Worten

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Abstract

The aim of this work project is to suggest a corporate social responsibility and communication strategy with a central element: a social responsibility mechanic focused on the Christmas period for Worten, the retail leader in home appliance and consumer electronics in Portugal. To identify consumers' perceptions regarding corporate social responsibility, Worten and the willingness to participate in the proposed activities, qualitative and quantitative researches were conducted within the adoption of the Creative Business Idea model. The strategy proposal is based on the support of local communities and of social strata vulnerable to the current crisis through the partnership with a national NGO with local delegations. Cause promotion, cause-related marketing and community volunteering are the tools used to pursue the CSR strategy proposal.

Key Words: Corporate Social Responsibility, Cause-related marketing, Worten, Communication plan

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Introduction

With the aim of proposing a corporate social responsibility and communication strategy for Worten, this work project relied on the main objective of creating a social responsibility mechanic, able to increase in-store traffic and approximate Worten to the local communities, with a focus on the Christmas period, as reported in the Communication Agency briefing.

The model adopted to achieve the proposal was the Creative Business Idea (CBI) of the communication agency Fuel. In a first stage, a qualitative research was held to gain insights about consumers' perceptions regarding corporate social responsibility and Worten. From the results of secondary research and of the qualitative research, a strategy proposal was created, further tested through a questionnaire to consumers and contacting the other stakeholders involved, namely a Worten's manager, a Cáritas' representative and schools' directions.

The project starts by analyzing the current market situation regarding the category, Worten and consumers, followed by the strategy, in which its elements will be described, namely the creative idea, the objectives, the positioning, the mechanics, the communication and the implementation plans.

1. Literature Review

In the last decades, several definitions and terms have been attributed to Corporate Social Responsibility (Kotler and Lee, 2005) carrying the principle that companies have **responsibilities going beyond profits and laws** (Swaen and Chumpitaz, 2008). In fact, **internal and external stakeholders** of companies are, more than ever, demanding changes and **expecting responsible actions** from companies: the globalization, technology advances and market liberalization increased the access to information, making stakeholders more informed and skeptic (Vrioni and Bronn, 2001). From employees and investors who want to belong to responsible companies, to consumers who are climbing the Maslow's Hierarchy of

Needs to seek self-realization and emotional attachment, **social responsibility is based on a stakeholders dialogue** (Pringle and Thompson, 2001). Davis (2005) and Grow et al. (2005) pointed that if companies do not want to threaten their financial sustainability and long-term competitiveness, they “*should have in place a process to integrate social, environmental, ethical and human rights concerns into their business operations and core strategy in close collaboration with their stakeholders*” (European Commission press release, 2011, p.1), proving that Friedman’s (1970) perspective that the “*social responsibility of business is to increase profit*” is losing ground.

Whether driven by **egoistic, strategic, stakeholder or values motives** (Vlachos et al., 2008), CSR usually covers the areas of economy, society, environment, community, employee welfare, financial performance and corporate governance, as a result of the **companies’ reflection of their role on society** (Postner and Blomqvist, 2004; Argandoña and Hoivik, 2009).

Positive links between a company and CSR such as impacts on sales, market share, brand positioning, corporate image, employee satisfaction, capital markets, operating costs and quality management have been observed. The lack of standardized metrics and long-term effects of CSR difficults the measurement of **tangible results** (Byus, Deis and Ouyang, 2010). However, several studies identified CSR **intangible benefits** on **corporate image** (Youn and Kim, 2008), **brand attitude** (Sohn, Han and Lee, 2012), **purchase intention** (Postner and Blomqvist, 2004), **trust** and **credibility** (Chen, 2011). To maximize CSR benefits, companies should approximate it to the strategy and commit to a long term view (Heslin and Ochoa, 2008). The concept of **strategic CSR** involves the “*principle of shared value*”: to use it as source of opportunity, innovation and competitive advantage, companies

should choose issues both valuable for their business and for society (Porter and Kramer, 2006).

Through a **consistent alignment of brand, strategy, audience and cause** (Postner and Blomqvist, 2004; Carlson, 2012; Chang and Liu, 2012), the risks of skepticism and cynicism of consumers diminish regarding the companies' purposes to do CSR (Arendt and Brattel, 2010). Li et al. (2010) point that companies should carefully communicate its CSR commitments, as it may affect reputation negatively. Kotler and Lee (2005, p.3) describe CSR as a "*commitment to improve community well-being*" and propose an **effective model** able to connect a corporation to a cause: the **use of a theme applied to six initiatives**, either focused on internal dimensions of the company - community volunteering and socially responsible business practices - and external - cause promotions, cause-related marketing, corporate social marketing and corporate philanthropy.

In conclusion, long term strategic CSR partners businesses, causes and consumers in a **triple-bottom gain** (Adkins, 2003), enriching companies with competitiveness, sustainability and success (Arendt and Brattel, 2010). The way for future business value is not just economic anymore, but the fusion of it with social value (Austin, Gutiérrez, Olgiastri & Reficco, 2006).

2. Company and Brand Background

Worten belongs to the non-food retail area of Sonae SGPS¹, a multinational holding which operates also in other business areas. The first Worten store opened in 1996, and nowadays the brand has more than 130 stores in Portugal. Worten is the **leader in the retail consumer electronics and consumer appliances**, and has recently expanded its offer to the cultural entertainment category and its insignia to Spain². Besides that, it currently owns five private

¹ The Sonae non-food retail holding is Sonae SR, which along with Sonae MC, is part of Sonae's core business

² Euromonitor International. 2012. "Worten Equipamento para o lar SA in Consumer Electronics (Portugal)"

labels (Becken, Kunft, Mitsai, Matizcore, Nplay and Goodis) and has two sub-brands: Worten Mobile (telecommunications' specialist) and the Worten Onlive (website and online store).

3. Situation Analysis

3.1. Methodology

In order to develop a strategic, differentiated and integrated idea, I used the **Creative Business Idea model**. It was developed and is a property of Havas Worldwide³, and involves the analysis of three dimensions: category, prosumers (consumer insights) and the brand. Besides the use of **secondary data**, to gain insights of consumers' opinions about Worten and CSR, I conducted a **qualitative research** based on semi-structured interviews. The sample was composed of 21 people, from 19 to 62 years old, 9 men, 12 women, in which 11 live in Lisbon and 10 do not (appendix 4). To validate the exploratory research, a quantitative research was also carried out, with a sample of 267 respondents (appendices 8 and 9).

3.2. Category Momentum

Worten belongs to the category of technical consumer goods, in which a group of electronic and appliances specialist retailers operate. Besides Worten; Rádio Popular, Media Markt, Fnac, ECI (El Corte Inglés) and Box Jumbo are the main players of this category, named as **“category-killers”** due to their competitive prices, aggressive marketing approaches, technical counseling and convenience.⁴

A sensitive category to economic cycles⁵, technical consumer goods observed a 10% downturn in revenues during the last year⁶. Positive demands are only observed on digital

³ Havas Worldwide is the former Euro RSCG Worldwide, one of the largest integrated marketing communication agencies, which owns communication agencies such as Fuel, Arena Media and Havas Digital.

⁴ Cavalinhos, Sílvia Rodrigues. 2010, “A importância da marca do distribuidor no mercados electrodomésticos”, ISCTE, 58

⁵ due to its lower consumption usage and satisfaction of superfluous needs' nature as pointed in Banco de Portugal. 2012. “Projeções para a economia portuguesa: 2012-2013 – Textos de Política e Situação Económica” in Boletim Económico Verão 2012

⁶ GfK Group. 2012 “GfK_TEMAX Q2 2012”

TVs, tablets and smartphones due to the consumers' trend of a **24/7 basis internet connectivity**⁷ and the growth of the online as a distribution and communication channel.

Retailers face the **challenge of maintaining market shares** in the current recession. This justifies their marketing strategies based on **“low prices” communication** claims; **investment on exclusive promotional campaigns**, social media, e-commerce and targeted advertising with well-known celebrities; **products' offer expansion** and **negotiations with financial entities** to offer free interest credit to consumers⁸(**appendix 2**).

Towards consumers' proximity, this category started to take **CSR** actions recently, **since 2007**, with both Fnac and Worten investing in initiatives. Box Jumbo and ECI have also taken actions through their corporate brands⁹, with no specific focus in electronics, home appliances or cultural entertainment products' categories. The social responsibility themes within this category have been mainly the **support of new talents**¹⁰, **social problems** (support to hospitals, institutions, poverty and human rights) and **environment** (awareness activities and collection of electronic residuals). While Fnac has been partnering with several famous organizations with dispersed activities¹¹, Worten has opted to act within Portuguese small institutions by partnering with Banco de Bens Doados (ENTRAJUDA) while in the past it also supported Humanitas and Ajuda de Berço. The fact that only two of the main players in this category take social responsibility actions shows that **CSR in this category is still expanding**.

3.3. Prosumer Momentum

Worten has a large target composed by **three main segments**: price-driven consumers, families (who look for trust and warranty) and in a small fraction, the technology freaks. The

⁷ Euro RSCG. 2012. “The Big Little Book of Nexts: Trendspotting for 2012”

⁸ 2012. “Consumer Electronics in Portugal”, Euromonitor International

⁹ Box Jumbo is part of Grupo Auchan and ECI's electronics category belongs to the ECI group.

¹⁰ “Novos Talentos” by Fnac and “Rock Rendez Worten”

¹¹ AMI, Amnistia Internacional, CP, Hospital de S.João

typical consumer is male, aged 35-44¹². Nevertheless, the age group with a better image of Worten is in the 15-24 age group¹³.

From the qualitative and quantitative researches (**appendices 4 and 9**), consumers are divided in a group that goes to Worten only when needing something, at an average of less than 6 times per year, and other, a younger segment (20-25), going for entertainment motives, at least once per month. Internet, family and friends are the main **influencers** when taking a purchase decision in this category. Concerning media used by consumers, **social media** is gaining ground: a research made by Netsonda¹⁴ refers that 54% of consumers think it is important the way brands communicate online, 58% like brand pages on Facebook and 68% point social causes as their favorite groups. According to the Meaningful Brands study (Havas Media)¹⁵, **79% of Portuguese consumers consider that big companies should make an effort in the resolution of social and environmental problems** leading to 66% who trust more on companies recognized as having social and environmental practices. Moreover, two main trends are observed: the **“Go Local”**, in which a social responsibility of proximity with short-term impacts is valued (current Portuguese context, reflected in the qualitative research) and the **“Scrutinity”** trend, explained by a general **skepticism** in traditional institutions and the need to have more transparency and authenticity^{16 17}. Also on the Meaningful Brands study, 58% refer that companies are trying to be social and environmental responsible only due to image benefits, while 42% refer that companies are developing a serious effort on CSR. In the qualitative research, when asked about this aspect, consumers gave mixed answers: the majority of the respondents referred that in some cases the association to causes

¹² Interview with Alexandra Balão, manager at the Marketing Electronics Division of Worten, appendix 5

¹³ Grupo Marktest. 2011. “Marktest Reputation Index (MRI)”

¹⁴ Netsonda. 2010. “Face to Facebook”

¹⁵ Meios e Publicidade. 2012. “As marcas são relevantes para os portugueses?” September 17. <http://www.meiosepublicidade.pt/2012/09/17/as-marcas-sao-relevantes-para-os-portugueses/>

¹⁶ Euro RSCG. 2012. “The Big Little Book of Nexts: Trendspotting for 2012”

¹⁷ The Consumer Intelligence Lab. 2011. “Tendências de mudança do consumidor português”

is related to **sustainability and to the human side of the brand** (honest component), but at the same time, they observe that *“nothing is done with no return”* (Male, 23) due perceived interests in **tax, marketing and image benefits**. In the quantitative results, 75% agrees that companies associate to causes to have tax benefits, 92.4% perceive it as a source of image benefits and 77.9% believes on the companies ‘will to have a bigger impact in the community. The agent with more responsibility in the society is, for the respondents of the qualitative research, **each citizen. Younger targets** (the “millenials”)^{18 19} are the ones more interested in social responsibility, recycling and volunteering. Other issues approached were the type of initiatives preferred, the willingness to pay more for a social or environmental-related product, consumers’ favorite causes’ themes and past successful campaigns. Regarding the types of initiatives preferred, different examples of six CSR initiatives were shown to consumers. **Corporate Social Marketing** is the favorite (n=13) in which consumers refer the importance of **education** for a cause in schools, followed by nine consumers preferring Responsible Business Practices (employees’ welfare association) and Philanthropy; eight consumers point the importance of Cause Promotions (as it reaches lots of people) and seven prefer Community Volunteering (with divergent opinions – some point that employees would not work while others praise the activity). **Cause-related marketing** (CrM) is the initiative more associated to skepticism about the management of money. When asked about the willingness to pay more for a social-related product, the consumer financial situation at the time, the mood on the purchase moment and the credibility of the institution are crucial in the contribution decision. Concerning **favorite recipients or themes**, the most preferred are children (n=7), unemployment (n=4), oncology, domestic violence (n=3), education, culture, recycling and nature (n=2).

¹⁸ 2011. “Relatório de actividades 2011”, Entrajuda

¹⁹ 2011.”The Big Little Book of Nexts: Trendspotting for 2012”,Euro RSCG

The current recession explain these conclusions, as it caused vulnerability, increasing consumers' preferences for experiences and proximity to their communities. In the other hand, it also enriched the brands' role of accompanying consumers, creating emotional attachments and providing transparency on their activities. As pointed by a consumer, *“nowadays local causes are more important...help should start on solving problems closer to us caused by the current crisis”* (female, 36).

3.4. Brand Momentum

Worten is the brand leader in the electronics and appliances retail in Portugal (market share of 34.5%) and with the **highest share of voice** within the category. **To maintain its leadership position**, it has increased price promotions, marketing investments as well the promotion of inter-related consumer electronics products and private label brands²⁰.

Worten claims a “low prices” positioning with key differentiators: a diversified offer, technology news and the after-sales service²¹. In the qualitative research consumers rated the Worten customer service as good, however, fast and less accompanied (n=4). In the quantitative research, when asked to evaluate Worten in several features from 1 to 5 (in which 1=very bad and 5= very good – appendix 8), consumers value more the diversified offer (mean of 3.98), convenience (3.72) and the quality-price relationship (3.57) while rating less favorably the “low prices” claim (3.28) and the concern with employees and environment (3.29 and 3.26, respectively).

Youth, technology, innovation, dynamism, modernity, proximity to local communities, diversity of consumers, an aggressive marketing and some sensationalism are values and characteristics attributed to Worten, a brand that has been recognized in the last years with

²⁰ Euromonitor International. 2012. “Worten Equipamento para o lar SA in Consumer Electronics (Portugal)”

²¹ Superbrands Portugal. 2009. “Superbrands 2009”

awards²² in which the dimensions of “products and services”, “social governance” and “social responsibility”^{23 24} have an increasing preponderance. Concerning **Corporate Social Responsibility**, Worten is interested in “contributing to a more sustainable world”²⁵ by resorting in its core business and on the values of its corporate brand, Sonae. Sonae has a strong CSR policy and was elected as one of the “World’s most ethical companies” in 2012²⁶. Its interest in society improvement and in sustainable development is represented in Worten through the investment on social and environmental responsible projects. **Internally**, it incurs on community volunteering (e.g. recent activities with Aldeias SOS and training in high schools) and **externally** has taken projects in the areas of **music** (Rock Rendez Worten, 2008), **environment** (Planeta 3R and sponsorship of Eco-Escolas) and **social causes** (Arredonda in 2009 supporting Humanitas and in 2010 helping Ajuda de Berço). The last and longest project, Equipa Worten Equipa (since 2009), mixes both social and environmental elements by inducing to recycle, trading residuals into new equipments for institutions. Selected by ENTRAJUDA, the institutions are located along Portugal, meeting consumers’ expectations of proximity and short-term impacts. Besides that, it engages the stores’ employees as they deliver personally the equipments. Worten looks forward to **not exaggerate in the communication of social responsibility**, doing it gradually in order to avoid backlashes. In the qualitative research, consumers are aware of Arredonda (n=3), pointing it as a “simple way to donate” (Male, 22) but when faced with other activities, are not able to recognize them as belonging to Worten initiatives, with only three consumers

²² Imagens de Marca. 2012. “Top Portuguese Brands League Table 2012” in “*As 50 marcas mais valiosas de Portugal*”, June 8. <http://imagensdemarca.sapo.pt/miradouro-da-actualidade/as-50-marcas-mais-valiosas-de-portugal>

²³ Selecções Rider’s Digest. “Marcas de Confiança 2010”, “Marcas de Confiança 2011”, “Marcas de Confiança 2012”

²⁴ Briefing. 2012. “Global RepTrak Pulse Portugal 2012” in “Empresas Portuguesas no Top30 das mais reputadas em Portugal”, May 15. <http://www.briefing.pt/marketing/16508-9-empresas-portuguesas-no-top30-das-mais-reputadas-em-portugal.html>

²⁵ Worten. 2012. “Responsabilidade social e ambiental”.

http://institucional.worten.pt/index.php?option=com_content&view=article&id=48&Itemid=54

²⁶ Ethisphere. 2012. “2012 World’s Most Ethical Companies”. <http://www.ethisphere.com/wme/>.

associating the brand to the recycling of residuals. However, records in the residuals' collection in Equipa Worten Equipa have been achieved year after year and Worten has received awards both in this project²⁷ and in Arredonda²⁸.

3.5. Insights from the three momentums

To achieve the **CBI – Creative Business Idea**, after analyzing the dimensions of **category**, **brand and prosumer**, it is important to explore the **intersections** between them, where opportunities lie. In **brand advantage**, the intersection between the brand and the category, it is concluded that Worten should keep reinforcing its CSR strategy, mainly because it is one of the few brands which takes CSR actions within the category. Besides helping it “*to stay in the market*” (Male, 51) it also works “*not only as a way of improving their image close to consumers but also to promote the example to other economic groups*” (Male, 22).

In **brand opportunity**, lies the chance of taking CSR actions closer to consumers, so that the consumer is acknowledged about the results and more willing to contribute. In the qualitative research consumers point their willingness to contribute if some conditions are observed: “*We do not know where the money is going (...) depends on the institution's credibility and to what the money is directed*” (Male, 27), “*I would only contribute if I had a good knowledge of the project and of the institution*” (Female, 26) and “*I prefer to focus my donations to actions which are closer to me, in my community, to things to which I know they are directed to...it is important to show the results of people's donations, to whom it went, in what it resulted*” (Female, 23) are quotes that express consumers' interest in local problems, campaigns' results and the importance of trusting in the agents who take CSR actions.

²⁷ Cisionwire. 2012. “Equipa Worten Equipa recebe menção honrosa”, July 4.<http://www.cisionwire.pt/worten---equipamento-para-o-lar--s-a-r/equipa-worten-equipa-recebe-mencao-honrosa,c760438304>

²⁸ Briefing. 2012. “Responsabilidade social” in “Prémios Eficácia da Comunicação 2012”, July 5. <http://www.briefing.pt/premios-eficacia-da-comunicacao-2012/17199-responsabilidade-social.html>.

Taking into account the growth in smartphones, tablets and social media usage, Worten should also take advantage of those product trends as an action and communication vehicle with its consumers and gain **brand relevance** (intersection between brand and the consumer).

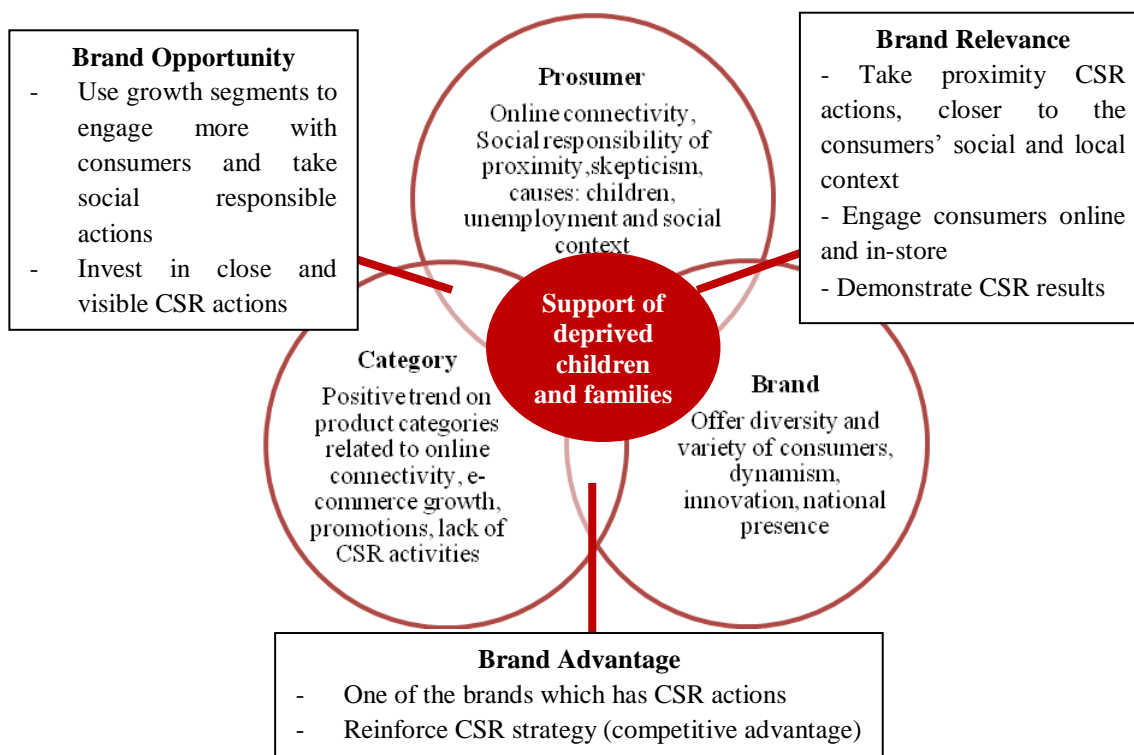


Figure 1 – CBI Focus

4. Creative Business Idea

4.1. The Concept

The consumers' interest in proximity actions meets the need of Worten to be recognized not only as an insignia but also as an active agent of each community where it is present. In the briefing, Worten noted that besides **local involvement** it also pursued **more traffic in-store**, through the engagement of employees and consumers in the CSR actions, with a focus on the Christmas period.

In the qualitative research, consumers point as their favorite causes, the ones related to children and to the social Portuguese context (unemployment). In the quantitative research, consumers are asked to rank causes, among deprived children, deprived families, poverty and

unemployment. Deprived children and deprived families were the preferred, therefore, the theme of the CSR strategy is the support of deprived children and deprived families living in poverty situations (appendix 8).

The CBI consists in a CSR campaign focused on the Christmas period, based on three main pillars: **a) Proximity and Local engagement** (of community stakeholders – consumers, employees, NGO partner and schools); **b) Direct contribution to the Portuguese population who is more fragile to the current crisis** (mainly children and families in need) in each community where Worten is present and **c) Recognition to the participants in the CSR actions** (employees, consumers, NGO and schools). Accordingly, a **NGO** present in several locations supporting that recipient target was chosen: **Cáritas**.

As a campaign focused on the Christmas period, a central element and object related to that period was chosen, the “**star**”, also associated to hope, orientation and talent. With these meanings taken into account, the star represents the **solidarity** of consumers and of Worten towards the partner institution (donations), the **orientation** it will have to the recipients supported by the partner institution and **talent**, through the activities that will be developed with schools. In accordance, the messages will be based on the “shine” and impact that everyone can have by simply adhering to the campaign.

4.2. Worten and Cáritas

Cáritas is a religious NGO which main **mission** is to intervene in the most **severe poverty and social exclusion situations** by incentivizing social promotion and a supportive development. It is **present nationally** with regional departments, working closely with the population in need and identifying problems fast. The main **values** are dignity, equality,

solidarity and stewardship²⁹. Due to the current socio-economic situation, the number of help requests to Cáritas has increased 70% during the last year³⁰, prompting the need of the NGO to have partnerships to improve its response capability. It currently has a campaign named “10 milhões de estrelas” (10 millions of stars), in which donations are rewarded with candles in a symbolic way. Worten campaign, using a star as a symbolic object, fits with this campaign that Cáritas takes every Christmas.

4.2.1. Worten’s objectives

Worten’s objectives with the campaign are mainly: **a) Enhancement of the brand image, b) Reinforcement of Worten’s CSR positioning and values** as a company committed to support proximity causes and the **communities** in which it is integrated, **c) Generate in-store traffic** by engaging **consumers** on the campaign, **d) Engagement of employees**, improving their satisfaction and **e) Raise funds to Cáritas** and the causes supported.

4.2.2. Cáritas’s objectives

Cáritas’s objectives are mainly: **a) Raise significant funds** to the projects in more need of capital, **b) Raise awareness** of Cáritas’s causes, actions and its need for funds and **c) Develop** the opportunity of a **major corporate partnership** with Worten for a long-term period.

4.2.3. Key success factors

The main factors that contribute to the success of this campaign and partnership are mainly: **a) the fact it is a social activity of proximity**, as Cáritas is a NGO with direct action on the communities’ social context, helping the most fragile social strata; **b) the national and regional presence of both Worten and Cáritas; c) the in-store engagement opportunities**

²⁹ Nowadays it develops two main programs: the “Programa Prioridade às Crianças” (focus on health and education to children) and the “Fundo Social Solidário” (financial support to people with difficulties in having access to basic resources such as medicines, electricity, gas, water and housing).

³⁰ Jornal de Notícias.2012. “Atendimento da Cáritas a famílias carenciadas aumentou 45%”, November 17.http://www.jn.pt/PaginaInicial/Sociedade/Interior.aspx?content_id=2893139

for employees and consumers; **d) reward and recognition** (for consumers and employees who contribute); **e) the pro-activism of Cáritas** in answering to social problems that matches with **Worten's dynamism** and its CSR mission of contributing to a world more sustainable socially and environmentally and **f) the fact that it is a campaign more focused on the Christmas period**, a time in which consumers are traditionally more willing to contribute to social causes.

5. The program

5.1. Stakeholders and Target Audiences

As pointed above, this campaign involves several stakeholders. Worten, Cáritas, Worten's employees, consumers and schools, enter in the campaign as interdependent agents: **Worten** – the agent responsible for communicating, managing and measuring the results of its activities; **Cáritas** – will have a crucial role in the communication of the campaign in the website and of the results such as the money received and the number of people supported; **Worten's employees** – are fundamental in the process. They are the ones who will communicate more the campaign, face to face with consumers. Their efforts will be renowned through a recognition program and in order to feel closer to the NGO partner, they will participate in volunteer activities sponsored by Worten. **Schools and students** – through the participation in contests and on in-store activities, schools and students will assume an important role in the activation and awareness of the campaign. **Consumers** – the campaign will only have success if the consumers engage in the mechanics programmed. The main targets are Worten Brand Loyals and Favorable Brand Switchers. **Suppliers** – as a margin of a selection of products will revert for the NGO, suppliers may enter as partners in those actions.

5.2. Positioning and Differentiation

To people between 18 and 55 years old, Worten is the leader in the retail of appliance, consumer electronics and entertainment (**frame of reference**) that takes action in the communities where it is involved, because it supports its NGO partner (Cáritas) with tangible and intangible funds (**Point of difference**) by developing cause promotions, cause-related marketing and volunteering activities with its consumers, employees and suppliers (**Reasons to believe**).

The differentiation of the campaign is the engagement of not only consumers but also employees, by incentivizing and rewarding their actions. **Reward** and **recognition** (of employees, consumers and stores) are present on the mechanics explained below. On the other hand, campaign's results occur close to consumers, benefiting the communities, as Cáritas has departments located close to Worten stores.

5.3. Mechanics and Initiatives

As described above, the **“star” is the central element of the campaign**. The mechanics and initiatives are focused on it, following the principles of Sue Adkins in “Cause-Related Marketing”³¹ of **simplicity** and **ability to engage** the parties involved.

5.3.1. Star in exchange for coupons – Through the purchase of a star (which can be part of home Christmas decorations), the entire value (less the cost of production) will revert to Cáritas. In one of the stars, the consumer receives a **discount coupon** to be redeemed in selected products of several categories, until 31st January. There will be two stars, with different sizes and prices, representing Christmas and two Cáritas recipients: deprived children and families. When buying the star, an employee takes a photo to the consumer which will be put in a “stars” mural of the store, as well in Worten's Facebook page.

³¹ Adkins, Sue. 1999. “Cause-related marketing: who cares wins”. Oxford: Butterworth Heinemann.

The amount of money fundraised in each Worten will go to attend help requests in the closest Cáritas department. **During** the campaign, the number of stars fundraised in each store is communicated in-store with stars in a Christmas tree and an informative poster. At the **end** of the campaign, consumers will know on what the value of stars was spent through communication in-store, Worten and Cáritas websites and a newsletter, being encouraged to give their contacts at the moment of purchase.

- **Star “Crianças felizes” (red)** – star that emphasizes Christmas as a time for children happiness. It is priced for 2 euros and represents the donation of 1.6 euros to Cáritas³².
- **Star “Família” (gold)** – emphasizes Christmas as a time to reunite family. It is priced for 5 euros and represents the donation of 4 euros to Cáritas. In exchange for this star, the consumer receives a discount coupon of 20% as a cash refund, meaning that the consumer first needs to purchase a product and 20% of the value of that purchase can be redeemed in a second one. This cash refund scheme was preferred due to the varied range of product prices in store and to operational motives, as Worten occasionally takes the initiative “Nota 20”, a consumer promotion that consists in providing 20% of purchases’ value as a discount in second purchases.

5.3.2. Value of selected “star” products to donate – in every store a selection of “star” products will be made, also called as “solidary products”. For every “star product” that is purchased, a margin of one euro will be donated to Cáritas.

5.3.3. Fundraising recognition program – to engage employees in the fundraising objective, internal communication will be crucial, incentivizing employees to do an “indirect” volunteering. The **employees** able to fundraise more stars (in % of the number of purchases of

³² The cost of production of the star was assumed as 20% of the final price, similarly to the Christmas campaign of Worten in 2012 “Dê a mão por um Portugal + Feliz”

the store), will be recognized in store as the “star employee”, and nationally, the **store** fundraising more stars will also be recognized internally as the most solidary “star” store.

5.3.4. Employees’ volunteering – accordingly to the needs of each Cáritas local department, Worten will offer **twenty hours** to the employees interested in volunteering in their local communities. The core volunteering of Cáritas is to identify urgent situations within the communities where it is present, making the process of support very personal. Besides that, it welcomes volunteers in the organization of awareness and animation activities, accompaniment of people (e.g. visits to elderly, support to children) and participation on local projects. Each store manager of Worten would be responsible of contacting the local Cáritas in order to arrange a volunteer schedule, accordingly to the needs in the local community. Besides increasing the employees’ satisfaction, this action also has the objective of inculcate the volunteering habit in the employees, bringing them closer to the communities.

5.3.5. Social media campaign – Worten is a brand with a good presence on social media, therefore it is important to enable their fans to contribute also online. Within the star and Christmas concept, consumers will have the opportunity of sharing one star with standard or personalized messages related to Christmas through a Worten app. For each star/felicitation shared, 0.05 cents revert to Cáritas. The 3 persons who share more stars, can gain awards and be recognized as the most “solidary” consumers.

5.3.6. Contests and activities with schools – The contests and activities with schools have the major goal of **enhancing talents in design, writing and music**, analogously to the “shine” of the star. Moreover, the involvement with schools enhances **community engagement** in the campaign, which is also a crucial goal. Developed in different years, the contests will be based on the message of incentivizing the students to put their “shine” in practice by showing their talent and contributing to help someone with it, as the winners will

have their works merchandised, with the profits reverting to Cáritas. The activities would consist in: **a) music showcases** – schools with Music Education close to Worten stores invited to present music pieces in stores, during the Christmas period, working as an activation of the campaign. The schools participating, receive education and technology related products in need; **b) design contest** – this contest would be launched in the second year of the project, directed to Art students in high school - the challenge is to create a design for the stars to be sold that year in Worten; **c) writing contest** – a contest directed to students from the 3rd to the 9th grades would be held with the theme of “Christmas stories”. Students would be divided into three categories –primary school students, 5th and 6th grade students and 7th, 8th and 9th grade students. The winner stories would be compiled in one book available in e-book format and physical format in the year after. The E-book format is for free while the physical format is sold in stores for 3 euros, with two euros reverting for Cáritas³³.

5.3.7. Specific in-store activities

Besides the mechanics above, particular in-store activities would be developed in representative days. On the 5th of December, the world day of volunteering, consumers who are volunteers in any NGO have 5% discount in the selected star products. The 20th December, the international day of human solidarity, will also be celebrated with Worten doubling the donation for each star that is bought and each star shared on Facebook.

6. Communication Plan

6.1. Target Audiences

Primary target audience – The primary target audience is composed by consumers who are **Brand Loyals** to Worten. This target is between **25 and 45 years old**; has **lack of time to participate in volunteer activities** (therefore looking to contribute to social causes through

³³ The cost of production would be one euro, with the two remaining euros reverting for Cáritas. This cost was assumed taking into account that Leopoldina books sold by the Sonae brand “Continente” cost 1/3 of the final price.

donations in a simple way); has **financial capacity** and is **aware of social problems** caused by the crisis.

Secondary target audience – The secondary target audience is composed by **Brand Loyals** and **Favorable Brand Switchers** consumers. They have between **18 and 55 years old**, have **lack of time** to volunteer, are in a **financial situation less stable** than the primary target audience, are **price-driven** (willing to participate in the campaign in case it rewards them) and are **aware of social problems**, being more willing to participate in the **activities that do not require spending money**.

6.2. Action Objectives

The main objectives consist in involving the consumers in all the campaigns, in particular the ones occurring in-store, to generate traffic. Accordingly to the quantitative research, 39.2% of the respondents are “very likely” to buy the star with no coupon in the range of 2.5-5 euros while 43.6% are very likely to buy the star in the same range with coupon. Due to the fact that in the questionnaire those situations were presented singly and in the campaign there would be the option to buy two stars, the optimistic scenario is that **35% of people will buy at least one of the stars**, being the **action objectives of 15% of consumers buying the small star** and **20% buying the big star** (particularly the clients looking to use the discount coupon). Based on 2012 data for non-food coupon redemption rates, the expected redemption rate of the coupon is 15%³⁴. Regarding the Facebook campaign, in the quantitative research, 56.6% of the respondents point they would be willing to participate, with 33% answering that the probability of participating would be high. As the consumers closer to Worten in Facebook, are their fans, from which 2% actively talk about Worten, the action objective is

³⁴ Supermarket News. 2012. “Coupon Redemption Up, Distribution Down in 2011”, May 7. <http://supermarketnews.com/datasheet/may-7-2012-coupon-redemption-distribution-down-2011>

that 2% of the Worten fans share it with 10 friends. These objectives are expected to be attained accordingly to the behavioral sequence model³⁵.

6.3. Communication Objectives

The main communication objectives to the campaign and to Worten are: **1) Brand awareness** of the campaign, in particular **brand recognition** at POP, **2) Increase brand attitude** regarding Worten, as a brand that cares about its community and **3) Brand purchase intention**, convincing consumers to buy the stars and redeem the coupons.

6.4. Communication Positioning Statement

(**Target**) To medium class, Worten brand loyals, (**frame of reference**) Worten is a differentiated brand in the retailing of appliance, consumer electronics and entertainment (**POD**) that offers the opportunity to contribute to a social cause in a simple way (**social approval**) because it develops solidary actions of fundraising to Cáritas.

6.5. Creative Strategy

The purchase of the star is a symbol of solidarity, shine and of support to the most fragile social situations to which Cáritas responds in local communities. The **motivation** behind the purchase of the star is therefore **positively originated** (transformational) related with social approval (“*if I buy I will feel good, and feel that I contributed to society in some way*”). As it is a low involvement purchase, it is considered in the Rossiter & Percy grid as a “**low risk ‘reward’ purchase**”³⁶.

The communication should, therefore, deliver **emotion and self-reward** and induce **likeability** to the audience, emphasizing the consumer as an agent that can make a difference by contributing to the cause and mentioning the benefits of having further discounts by

³⁵ The role of employees will be crucial to convince consumers to participate in the campaign in-store, while friends have an important role in convincing consumers to participate in the online campaign. Employees are the initiators and influencers since they may counsel the consumer during the purchase process and are present in the payment moment. Online, in the social media initiative, the participation may spread among friends, who take the role of influencers. The consumer is afterwards the decider, purchaser and user.

³⁶ Rossiter, John and Larry Percy. 1997. “Advertising and Promotion Management” 2nd ed. New York: McGraw Hill

buying the star. Accordingly, some of the slogans suggested for the campaign are: “Uma estrela. Um brilho nos olhos de quem mais precisa”, “Já pôs a estrela na sua árvore de Natal?”, “Este Natal queremos encher o céu de estrelas Worten”, “Worten. O nosso forte é pôr o seu Natal a brilhar” and “Põe o teu talento a Brilhar” (to the school competitions).

6.6. Integrated Marketing Communications – Key Media Channels

In order to approach the consumer to donate, a **push strategy** is developed. The main tools used in order to communicate the campaign will be advertising, public relations, consumer promotions and event marketing. As the main communication objectives are brand awareness and brand attitude, frequency and visual content to emphasize emotion will be important. As in previous years, the partnership with SIC, Expresso, Visão, RFM and Cemusa will be maintained in the promotion of the CSR campaign. Furthermore, POP communication and mupis in central areas of Lisbon and Oporto will be important in generating awareness to the campaign and communicating ongoing results of it. The mupis would have posted a Christmas tree that for each star bought, would show a light in the tree, accompanied by a poster information regarding the number of stars bought and euros collected. In the Worten stores, as previously named, a tree would also be present as well as information about the stars bought and euros collected in that specific store.

7. Implementation Plan

7.1. Timing

The implementation of the program assumes a 3-year period, mainly due to school activities that will be held and publicized in different years. The main activity in-store, the **sale of the stars** and the launch of “stars”/solidary products would start every year in mid-November, period in which consumers start to accentuate Christmas’ shopping. The launch of the campaign would be activated in stores with the music showcases performed by the students of

the participating schools. The **Facebook campaign**, would be launched after two weeks, in the beginning of December: it not only creates buzz for the campaign but also marks the period in which consumers start Christmas' felicitations to family and friends. Regarding the **volunteering** of employees, the activities are expected to be held in periods of less traffic in stores (all year excepting festivity periods and summer), although there is flexibility in the timings as the volunteering will be planned accordingly to the local needs of Cáritas. Finally, **school contests** would be communicated to schools in the end and beginning of the school years, as this is a period when professors delineate the yearly plan of activities. The launch of school competitions would be in the beginning of school terms, as these is the timing in which students are less busy with evaluations. In the first year of the campaign, no school contest will be held while in the second year the contests of writing and design are launched: the design contest right after the end of the first Christmas campaign (January 2014) and the writing contest in September 2014. The winning designed star of the second and third years will be the one used to sell in stores, in the respective year. The winning Christmas' stories will be evaluated in the end of the 2nd year (2014) and publicized in a book format in the 3rd year. Consumers value the concrete communication of the results their contributions had, so in the end of the campaigns' period, in January and February, participant consumers will receive informative newsletters, besides the POP and websites'(of Cáritas and Worten) results' communication (**appendix 11**).

7.2. Feasibility test

In order to test the implementation of the different activities I conducted a quantitative research in the form of online questionnaires to consumers and developed exploratory contacts: face-to-face with employees (n=10) in the biggest Worten stores (Vasco da Gama and Colombo) and by telephone calls and e-mail to directors of schools of Portuguese

regional capitals. A Cáritas' representative and a manager of Worten were also met, with positive opinions regarding the activities and a future partnership (**appendix 5 and 6**).

Among 10 **employees** contacted in the Worten stores, the majority points their interest in doing volunteering during working hours, depending on the volunteer area. Concerning **schools**, in a total of 30 contacted, 16 showed interest in participating; 2 referred no interest and 12 preferred to receive the proposal in e-mail format, from which only one answered, showing no interest. Schools' representatives pointed the fact that the contests had to be integrated in the yearly school plan, which is initiated in the end of the previous school year and finalized in the beginning of each school year, leading to the need of the contests to be communicated to schools during those periods. However, some limitations occur regarding the music activities, as the Christmas period is very busy and both students and professors have to be incentivized to participate.

Regarding **consumers**, the online questionnaire had the objectives of validating results from the qualitative research³⁷; of measuring the likelihood of participation in the activities, the impact of the initiatives in the consumers' opinion about Worten, Cáritas credibility and the main reasons behind not adhering to activities that imply the contribution of the consumer with money. The sample had a total of 267 respondents³⁸. When asked about the likelihood of buying a Christmas-related object with and without coupon in the range of 2.5-5 euros, 66% answered positively in the without coupon option while 72.7% to the coupon option (**appendix 9**). The Facebook campaign showed a 56.6% of participation likelihood. Regarding the impacts the different activities would have in the consumer opinions, the volunteering is preferred by 80% of the consumers, followed by the object campaign with

³⁷ related to brand image; perceptions about Worten's concern with employees, environment and social causes; frequency and motives behind consumers going to Worten and reasons consumers perceive as explaining CSR actions of companies

³⁸ 60% female and 40% male; 56.9% in the 18-24 age group, 27% in the 25-34 and 16.1% in the 35-54 age group (in order to do valid statistic analysis, the 35-44 and 45-54 age groups were joint and the more than 55 years old age group was eliminated due to lack of respondents); in which the majority has an undergraduate degree (44.5%)

coupon in which 74.7% of consumers answer that it would have a positive impact, followed by 66.1% in the non-coupon option and 66.5% answering that the campaign in which a margin of selected products reverts for the institution would have a positive impact. When asked about the credibility of Cáritas, consumers perceive it positively, as the answers' mean is 7,28 in a range of 10 values and 75% agree with a possible future partnership between Worten and Cáritas.

In order to evaluate if specific consumer segments would be more willing to participate, I analyzed statistically relationships between controlled variables (age, gender, education, past/current participation in civic activities and satisfaction with Worten) and the likelihood to participate in the activities, the opinion regarding them and Cáritas credibility. Statistically significant relationships were observed between the age and likelihood to participate in the object campaign with coupon for the 2.5-5 euros range³⁹; education and likelihood to participate in the Facebook campaign⁴⁰; Cáritas credibility and age⁴¹ and the relationships between Worten satisfaction with likelihood to participate in the object campaign with coupon for the range of prices 2.5-5 euros and 5-7.5 euros.

7.3. Evaluation and Monitoring

To analyze whether the campaign achieved its objectives, several key indicators will be measured, namely: **a)** amount of funds raised, **b)** the effect on customer traffic in-store and on sales, **c)** media coverage, **d)** effects on reputation and image of the brand, **e)** level of awareness regarding the campaign, **f)** employees' satisfaction and **g)** the impact of the amount fundraised in the local communities. The tools used to measure those indicators will be

³⁹ younger consumers are the ones more willing to participate (18-24 segment with 79% likelihood, 25-34 with 78% and the 35-54 with 50%)

⁴⁰ although more than half in all the statistically valid education segments (high school, undergraduate and masters) is willing to participate with no education distinctive impact, when observing the percentage of people not willing to participate, the higher the education, the more is the amount of people not willing to participate (highschool with 13,6%, undergraduate degree 22,7% and masters with 35,7%)

⁴¹ 85,7% if people in the segment of 18-24 years old evaluate Cáritas between 6 and 10, comparing with 65% of the 25-34 segment and 86,7% in the more than 35 years old segment

mainly surveys about the campaign to consumers and employees to evaluate their change on perceptions and satisfaction; sales data as way of measuring traffic in-store; media coverage data and how the funds raised were spent (as well who were the recipients) by requiring the report of results to Cáritas.

8. Financials

In order to set the campaign budget, two methods of setting promotion budgets were taken into account: the **competitive-parity method**, used in the marketing expenses forecast and the **objective-and-task method** on the merchandising sold within the CSR campaign (stars, stories' book and discount coupons). In order to calculate the CSR campaign forecasts, several assumptions were made regarding the number of consumers who buy at Christmas in Worten, the average purchase value at Worten in the Christmas period, the expected coupon redemption rate, the revenue expected from each coupon which is redeemed and the number of people participating in the Facebook campaign (**appendix 10**)⁴².

As the number of consumers participating in the main activity of the campaign, the sales of stars, is not certain, a scenario analysis (optimistic, most likely and pessimistic scenario) was computed in which the variables controlled were the percentages of consumers purchasing the small star, the big star and the book. As in the quantitative research, respondents were not faced with the possibility of choosing between a small and cheaper star without coupon, and a big star with coupon, I assumed that in the most likely scenario, 10% people buy the small star, 15% buy the big star and 10% buy the book, which translates in the fundraising of 582138.63 euros for Cáritas in the first and second years respectively and 709632.23 in the third year.

⁴² Budget assumptions and values should be interpreted as indicative taking into account advertising's advertising rates, national statistics and the likelihood of consumers to participate in the campaign accordingly to the quantitative research results.

10. Conclusions and recommendations

This campaign meets the need of Worten of having a social responsibility mechanic in which everyone can help without having to bring something from home (such as an old home appliance object like in Equipa Worten Equipa) and simultaneously representing Christmas: as it is a typical symbol of that period and works as the representation of the customer donation and solidarity.

Contrarily to some of the conclusions taken from the qualitative research, in which some consumers revealed skepticism regarding the results of their donations, in the quantitative research, consumers reveal to be open to participate by contributing with money, if in small amounts, particularly when rewarded with a discount coupon. However, there is the possibility of having a social desirability bias in the quantitative research. By other side, as concluded from the qualitative research, initiatives that involve a donation made by the consumer, require a high level of transparency, trust in the NGO and communication of the campaign results.

Limitations regarding the proposed strategy and the implementation test are also observed. One is the lack of diversity of education, occupation, residence and particularly age (as only 16.1% of the sample is constituted of people above 35) in the sample of the quantitative research. The second is regarding the employees' volunteering that although seen very positively by consumers, is difficult to implement, as after contacting a Worten's manager, it was perceived the difficulty of integrating volunteer hours in the working schedule. The third limitation regards the involvement of the consumers mainly in the Christmas period, rather than in the whole year. At last, budget forecasts also show limitations as they were based on assumptions, advertising rates and national statistics.

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