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**JOINT VALUE CREATION: THE CASE OF BEN & JERRY'S AND THE
INVOLVEMENT OF PORTUGUESE CONSUMERS**

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ABSTRACT

This work project intends to pilot joint value creation models for *Ben & Jerry's (B&J's)* Portugal. These models imply that a company's positive impact in the community generates business, creating incentives for it to continuously invest in socially responsible initiatives as part of its core business. Therefore, the aim is to raise awareness to *B&J's* mission through a "Corporate Societal Marketing" strategy, where consumers are engaged to act upon social and environmental issues. As such, two pilot experiments and a comprehensive survey were pursued. Results showed that while Portuguese consumers were not aware of *B&J's* values, awareness of the brand's CSR positively affects perception on quality, loyalty, reputation, and could ultimately lead to an increase in brand consumption.

Keywords: Joint Value Creation; Ben & Jerry's Portugal; Corporate Social Responsibility; Corporate Societal Marketing

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1. Introduction

Ben Cohen and Jerry Greenfield opened their first ice cream shop in 1978, in a converted gas station in Burlington - Vermont, US - with a \$5 Pennsylvania State University correspondence course in ice cream making (Ben & Jerry's Website, 2017).

From the beginning, *B&J's* incorporated into its business a strong sense of social responsibility: to their employees, the community, and the world. Unlike most companies, *B&J's* incorporates three pillars in its mission, that must thrive together, encouraging a linked prosperity:

- 1) **Product:** to distribute and sell the best quality ice cream which incorporates “*wholesome and natural ingredients*”, with the commitment to support business practices which are not damaging to the environment;
- 2) **Economic:** to operate the company in a sustainable way which increases value for stakeholders and creates new opportunities for employees' development and career progression;
- 3) **Social:** to engage in innovative ways of improving lives locally, nationally, and internationally (Ben & Jerry's Website, 2017).

Driven by Cohen and Greenfield's ideals, *B&J's* has grown to be a very successful business, being present worldwide, with an enviable level of brand-name recognition, having ranked 21st in the “*Top 50 Relevant Brands*”, in a survey made at a global scale (Prophet, 2016).

B&J's Portugal, however, has not been able to implement the company's original socially responsible corporate vision, which is core to the brand. In fact, since it has been present in the Portuguese market, *B&J's* has solely focused on marketing campaigns that do not communicate the brand's social purpose. Moreover, it has not been able to achieve a relevant value share of the ice cream market.

Additionally, the briefing of this project was to create a strategy for *B&J's* that allowed for positively impacting the community, while creating a relationship with consumers, which should ultimately lead to a sales' increase.

Accordingly, the approach followed was to design a joint value creation model between *B&J's* Portugal and consumers, where more business generates a higher social impact and vice-versa. This model was implemented through Corporate Social Responsibility due to its positive impact in consumers, following a Corporate Societal Marketing strategy.

Therefore, the research question of this work project is «**How can *Ben & Jerry's* Portugal create social and/or environmental impact in a joint value creation model, in which more social impact generates more business and vice-versa?**»

2. Literature Review: Corporate Social Responsibility As A Driver Of Joint Value Creation

Considering that societal needs highly impact markets and the way they operate (Porter & Kramer, 2011), firms are more interested in **joint value creation opportunities**. This means that there is a new source of competitive advantage, which is acquired by high-quality interactions that enable an individual customer to co-create unique experiences with the company (Prahalad & Ramaswamy, 2004).

One way to achieve these interactions is through **corporate social responsibility** (CSR). In fact, with the increase in public awareness and demand for socially responsible businesses, it does not come as a surprise that companies are integrating corporate social responsibility in their strategic planning (Deloitte, 2017). According to Chandler (2016), it is the responsibility of the organisation to talk about **CSR in terms of value creation**.

Despite the preconceived notions of CSR, value creation addresses to what is core about a firm, across functional areas. In fact, it should be embraced and, during the process, move from an optimal add-on to the central stage. Therefore, the author redefines CSR as being central to the value-creating purpose of the firm. Based on the theory of empowered stakeholders, Chandler (2016) argues that the “responsibility” of a corporation is to create value, broadly defined. Thus, it will be assumed in this working paper that **CSR can be one major driver of a successful joint value creation.**

Kotler & Lee (2008) define CSR as “*the practices that improve the workplace and benefit society in ways that go above and beyond what companies are legally required to do*”. According to the authors, CSR - which can be implemented due to strategic, defensive or altruistic reasons - is about the economic, legal, ethical, and discretionary issues that stakeholders view as directly related to the firm’s plans and actions. Despite the widely accepted proposal of Kotler & Lee, no clear definition on CSR has been defined, making theoretical development and measurement difficult (McWilliams *et al.*, 2006).

In the following sections, an overview of the theories around CSR will be presented (Section 2.1.), depicting afterwards the approaches that are considered most appropriate for this business case (Section 2.2.). Lastly, the expected returns and impacts of having a CSR policy will be displayed (Section 2.3.), as well as the implementation strategies that can be followed (Section 2.4.).

2.1. Corporate Social Responsibility Theories

Many theoretical perspectives have been made on CSR, keeping up with the theories developed on companies. Initially viewed as an agency problem that misused resources (Friedman, 1970), CSR was later claimed as being beneficial for firms, as it satisfies the

interests of a larger group of stakeholders (Freeman, 1984). Moreover, the Resource-Based-View (RBV) was also applied to the topic, and brought a new perspective, as it defended that CSR could constitute a resource or capability that would lead to a sustained competitive advantage (Hart, 1995).

Building on RBV, Baron (2001) used the term “*strategic CSR*” to refer to a profit-maximizing strategy where firms provide a public good together with their marketing/business strategy.

More recently, additional theories have been proposed, such as the ones linking CSR and organisational behaviour, where it was found that companies run by intellectually stimulating CEOs do more strategic CSR initiatives than comparable firms (Waldman *et al.*, 2004).

2.2. Corporate Social Responsibility Approaches

When applying the CSR concept towards a real business case, it is crucial to analyse the existing approaches in order to identify the most suitable one.

2.2.1. Triple Bottom Line

John Elkington has tried to measure sustainability in the mid-1990s within a new framework of measuring corporate performance: The Triple Bottom Line. This approach was designed to cover environmental and social dimensions by going beyond the calculations of classical profit, investment income, and shareholder value (Elkington, 1997).

Following the framework, it is advised that companies focus the same amount of time on each bottom line: 1) **Profit** - the economic bottom line, measuring the profit and loss account; 2) **People** - the social equity bottom line, measuring how socially responsible a company has been throughout its operations; and 3) **Planet** - the environmental bottom line, measuring how environmentally responsible a company has been.

According to this framework, only a company that follows a triple bottom line approach is taking into account the full cost involved in doing business (The Economist, 2009) (Appendix 1).

2.2.2. Carroll's Pyramid of Corporate Social Responsibility

An important attempt to close the gap between economics and other expectations in regard to CSR was developed by Archie Carroll, in 1979. His efforts culminated in the following proposed definition of CSR: *“the social responsibility of business encompasses the economic, legal, ethical, and discretionary expectations that society has of organisations at a given point in time”* (Schwartz & Carroll, 2003).

In 1991, Carroll revised this four-part definition and depicted it in the form of a pyramid (Appendix 2), proposing one of the most well-known models of CSR. It is *“a graphic depiction of CSR in the form of a pyramid”* based on a quadripartite framework: 1) **Economic Responsibilities**, as a baseline requirement, since this is a fundamental condition for companies' existence; 2) **Legal Responsibilities**, that are created by the society as minimal ground rules, under which businesses are expected to operate and function, respecting regulations and laws from federal, state and local levels; 3) **Ethical Responsibilities**, since society expects businesses to operate and to be conducted in an ethical way, embracing activities, norms, standards and practices that are not required by law; and 4) **Discretionary/Philanthropic Responsibilities**, including all forms of “giving” such as voluntary or discretionary activities done by the company, which are guided by the business' desire to participate in social activities that are not mandated or required by law, and not generally expected of the business in an ethical sense (Carroll, 2016).

Despite the pyramid's format, suggesting that a business should start from the bottom upwards, giving more attention to the largest level, ideally, no level of responsibility should

be treated with less respect than the other (Ojo & Rosati, 2016). On the same note, the pyramid is intended to be seen as a whole and not section by section. Accordingly, Carroll (1991) defends that firms should engage in decisions, actions, policies and practices that simultaneously fulfil the four parts rather than complying to them in some sequential, hierarchical way, starting at the base.

Therefore, the model being portrayed is one in which the total social responsibility of businesses entails the simultaneous fulfilment of the firm's economic ("*make a profit*"), legal ("*obey the law*"), ethical ("*engage in ethical practices*"), and philanthropic ("*be a good corporate citizen*") responsibilities.

2.3. Expected Impacts of Corporate Social Responsibility

Most scholars expect CSR to have a positive impact on the company, as it affects stakeholders' attitudes and behaviours, leading to social and business outcomes (Knox & Maklan, 2004). While these impacts are widely accepted, there is some literature showing lack of empirical results. Most of these inconsistencies can be attributed to the distinct CSR measurements used by authors (Martinez & del Bosque, 2013).

Scholars have found a positive relationship between CSR and several business dimensions, like: **employee productivity** (e.g. Rodrigo & Arenas, 2008; Ali *et al.*, 2010; Lee *et al.*, 2013), **employee retention** (e.g. Viswesvaran & Ones, 2002; Lee *et al.*, 2013); **cost savings and other efficiency gains** (e.g. Epstein & Roy, 2001; Luetkenhorst, 2004); **permission to operate**, based on social acceptance (e.g. Thorpe & Prakash-Mani, 2003; Schaltegger & Burritt, 2005; Weber, 2008); **disaster and risk management** (e.g. Weber, 2008); **image and reputation** (e.g. Lewis, 2003; Schwaiger, 2004), **investors preferences** (e.g. Brown, 1998; Benlemlih & Bitar, 2016), **lower financial risk** (e.g. Bouslah *et al.*, 2013), **lower**

information asymmetry (e.g. Cho *et al.*, 2013) and **easier access to finance** (e.g. Cheng *et al.*, 2014).

Considering the purpose of this project, CSR impacts on consumers are key, and therefore will be further detailed. Firstly, a link between CSR and **customer preference** was found, as customers seem to increasingly favour products and services from socially responsible, transparent and trustworthy firms (Mitchell, 2001), as long as these CSR initiatives are perceived as sincere (Simmons & Becker-Olsen, 2004). Interestingly, all consumers react negatively to negative CSR information, whereas only those most supportive of CSR issues react positively to positive CSR information (Sen & Bhattacharya, 2001). This means that, for example, all consumers react negatively to use of child labour, whereas only those more supportive of CSR react positively to use of fair trade ingredients.

To those reacting to CSR, an inconsistency between consumers' beliefs about CSR and their behaviours was found, as not all consumers claiming to be concerned about CSR were purchasing goods based on it (Mohr *et al.*, 2001). As the relationship between the variables is not constant, it was proposed by Mohr *et al.* (2001) that the relationship between beliefs about CSR and consumer behaviours will be stronger (a) the more knowledge consumers have about CSR issues, and (b) the more important they judge these issues to be. In fact, to base purchasing decisions on CSR requires: 1) learning about complex social/environmental issues and 2) gather information on firms' CSR activities, which are high effort behaviours that take time and are only taken if CSR is seen as important.

Moreover, CSR was found to impact **customer retention**, as it leads to the perception of an overlap between consumers' identities and that of the company (Sen & Bhattacharya, 2001; Lichtenstein *et al.*, 2004).

Additionally, CSR has a strong positive effect on **customer satisfaction** (Martínez & del Bosque, 2013) and on **customer loyalty** (Marin & Rubio, 2009; He & Li, 2011). However, CSR actions may elicit different reactions from consumers depending on the extent to which these are viewed as isolated endeavours or as the very basis of the brand (Du *et al.*, 2007).

Ultimately, CSR can lead to **revenue increases**, indirectly through an improved brand image and directly by CSR-driven products or markets (Weber, 2008). In line with this thought, Tsoutsoura (2004) indicated the existence of a positive relationship between CSR and profitability, leaving undefined the causality link that connects these two variables.

To conclude, CSR can be a **source of opportunity, innovation, and competitive advantage**. To better take advantage of it, CSR must be rooted in a broad understanding of the interrelationship between a corporation and society while at the same time being anchored in the strategies and activities of the company (Kramer & Porter, 2006).

2.4. Implementing Corporate Social Responsibility

According to Kotler & Lee (2008), there are six strategies that can be followed when implementing a CSR plan, and thus “*doing the most good*” for a company and cause:

1) Corporate Cause Promotions: the corporation provides funds, in-kind contributions or other corporate resources to increase awareness and concern about a social cause or to support fundraising, participation, or volunteer recruitment for a cause;

2) Cause-Related Marketing: the corporation commits to making a contribution or donating a percentage of revenues to a specific cause based on product sale;

3) Corporate Societal Marketing: the corporation supports the development and/or implementation of a behaviour change campaign intended to improve public health, safety, the environment, or community well-being. Behaviour change is the intended outcome;

4) Corporate Philanthropy: the corporation makes a direct contribution to a charity or cause, most often in the form of cash grants, donations and/or in-kind services;

5) Community Volunteering: the corporation supports and encourages employees, retail partners, and/or franchise members to volunteer their time to support local community organisations and causes;

6) Socially Responsible Business Practices: the corporation adapts and conducts discretionary business practices and investments that support social causes to improve community well-being and protect the environment.

3. Ben & Jerry's Overview

B&J's is an American company that manufactures ice cream, frozen yogurt and sorbet. Since its foundation, in 1978, *B&J's* has dedicated itself to a sustainable corporate concept of linked prosperity, which explains why its mission is based on three pillars: **product** (“*make fantastic ice cream*”), **economic** (“*manage for sustainable financial growth*”) and **social** (“*use our company in innovative ways to make the world a better place*”).

The brand's vision is to make the best possible ice cream in the best possible way, which they try to accomplish through:

1) **Ingredients sourcing and purchasing:** Using cage free eggs, supporting mandatory GMO labelling legislation, supporting fair trade, indirectly providing jobs to those who face barriers to employment on the Bakery, and helping farmers to move towards more sustainable practices with the “Caring Day” program;

2) **Manufacturing:** Calculating and reducing their footprint, putting their waste into methane digesters that turn it into power, using climate-friendly and energy efficient freezers, and using responsibly sourced packaging;

3) **People, community and “giving back”**: creating “partnerships” - *B&J's* scoop shops that are owned and operated by youth-serving non-profit organisations -, focusing on community actions, and campaigning to build awareness and support for social and environmental issues (Ben & Jerry's Website, 2017).

B&J's acquisition by *Unilever* allowed for its current global presence, being in 35 countries in 2017. As such, in order to guarantee their products' freshness and quality in all markets (thus complying to their product mission), the brand has two factories: one in Vermont, US, and a second one in the Netherlands (Steimer, 2017).

B&J's worldwide is often given as an example of a socially responsible company, due to the campaigns and initiatives that it supports so as to improve communities' lives. In fact, the company has sponsored music and art festivals around the world in an attempt to draw attention to the many **social and environmental causes** it supports. Likewise, the founders have always associated the company with social and environmental initiatives, such as: positioning against recombinant bovine growth hormone (1989), supporting farm aid (1990), campaigning with children's defence Fund (1992), campaigning against global warming (2002), promoting voting among youngsters (2004), protesting against oil drilling (2005), ensuring fair trade on raw materials (2006), demonstrating against animal cloning (2007), supporting protesters to rally against US poor economic situation (2011), and committing to use only non-GMO ingredients (2013) (Ben & Jerry's Website, 2017).

In addition to these causes, in 1985, ***B&J's* Foundation** was established in the US. This foundation guaranteed that 7,5% of the company's annual pre-tax profits are donated to fund community-oriented projects (also known as corporate philanthropy), supporting activism for social and environmental justice. Nowadays, the Foundation receives an annual allocation adjusted upward annually based on volume of ice cream sold (Ben & Jerry's Foundation Website, 2017).

The company's way of doing business was recognized in 2012, when it was certified as a B-Corporation, which is the highest standard for corporate social responsibility (Ben & Jerry's Website, 2017).

3.1. How Does Ben & Jerry's Do Business - Individual Parts

Porter & Kramer (2011) define **shared value** as the corporate processes that contribute to the business' competitiveness while, at the same time, fostering the advancement of the social and economic conditions of the communities where it operates. In fact, the way *B&J's* does business allows it to create shared value, as it integrates its social and environmental impact into the business.

According to the authors, there are three ways in which companies can create shared value:

- 1) **By reconceiving products and markets:** in which companies should create new products and services that address specific social issues in existing markets or lower costs through innovation;
- 2) **By redefining productivity in the value chain:** which embodies the company's need to redefine its value chain in order to drive not only economical, but also social value creation;
- 3) **By enabling local cluster development:** focusing in the fact that companies do not operate in isolation from community, thus, improving their productivity while addressing the gaps or failures in the whole community the company operates.

In *B&J's* case, the brand implements the model of shared value through redefining productivity in the value chain. Thus, in the following sections, *B&J's* way of doing business will be depicted as an example of how economic value can be generated by creating societal value.

3.1.1. Ingredients' Sourcing (Joana Alves)

Reasoning behind the choice: Consumers' interest in the origins of what they eat has increased throughout the years (Bureau Européen des Unions de Consommateurs, 2013). As such, many different product certifications arised, assuring consumers that the products they buy meet a certain set of criteria.

Considering that I have recently started working with *Nestlé's* organic products, I have become aware of not only consumers' demands, but also of those of wholesalers' and retailers'. The latter require detailed information on products' origins and characteristics, despite their organic certification, provided by the European Union.

Accordingly, and considering *B&J's* product mission and their many ingredient sourcing practices, and programs, I was curious to know more about the brand's ingredient sources and how these affect the community.

As mentioned before, one of the three parts of *B&J's* mission is to make the best quality ice cream - product mission. In fact, the quality of the ice cream is paramount for *B&J's* enviable reputation: the brand is known for having innovative, good quality flavours, and big chunks. Thus, in order to fulfil its mission, *B&J's* commits to incorporate natural ingredients in their products (Ben & Jerry's Website, 2017).

Ingredients' sourcing plays a key role, not only in the quality of the ice cream, but also in *B&J's* way of doing business. Thus, two operating practices of the ice cream maker related to the purchasing of ingredients are clear sources of shared value. In fact, **Greystone brownies** and the **Caring Dairy** program positively contribute to the progress of the involved communities and for *B&J's* products' quality and competitiveness (Ben & Jerry's Website, 2017).

1. Brownies

Two of *B&J's* ice cream flavours have brownies in their ingredients: Chocolate Fudge Brownie and Half-Baked™. These brownies come from Greystone Bakery, in New York. Since 1982, Greystone has been providing **job opportunities and training to those who face barriers to employment**; simultaneously, they have been engaged in producing award-winning baked goods, which have been since 1987 a part of *B&J's* most popular ice cream flavours.

In fact, the two flavours that have brownies in their composition ranked 1st (Half-Baked™) and 4th (Chocolate Fudge Brownie) in 2016's "*Top 10 Ben & Jerry's Flavours*" (Ben & Jerry's Website, 2017). It is thus safe to say that, by buying from Greystone Bakery, *B&J's* is not only contributing to the community's progress and welfare, but by integrating this into their core business (ingredients' supply), is producing superior quality products, which drives economic value.

2. Caring Dairy

More than half of *B&J's* ice cream content is made of dairy cream and milk (Ben & Jerry's Website, 2017); thus, for the manufacturer, it is paramount to guarantee that the dairy products used are of exceptional quality. Accordingly, the "Caring Dairy" program was developed to guarantee that the ice cream produced is the result of practices that respect farmers, cows, and the planet.

The program enables farmers to better "*evaluate, implement and improve*" **sustainable agricultural practices**. In addition, "Caring Dairy" has three performance tiers¹, with increasing levels of demanded standards and performance, which are **compensated accordingly** (Ben & Jerry's Website, 2017). As such, not only does the soil benefit from the

¹ *Standard Caring Dairy tier, Silver tier, and Gold tier.*

more sustainable practices, but so do the farmers, which are rewarded for their work and superior performance.

This program is thus a source of shared value: it simultaneously contributes to the sustainability of dairy farming and to the quality of *B&J's* ice cream.

All in all, *B&J's* ingredient sourcing practices meet social and environmental needs while guaranteeing that the ingredients included in the ice cream are of the best quality. Therefore, *B&J's* is striving in creating shared value by using their purchasing decisions to 1) positively impact the community, but also 2) to produce great-tasting, premium ice cream. As such, the brand is on the right path to meet consumers' increasing demands regarding ingredients' sourcing/origins.

3.1.2. Manufacturing Practices (Isabel Magalhães)

Reasoning behind the choice: As a marketer “in the making” with a great passion for fast moving consumer goods, I realise how crucial it is for companies, especially in this industry, to have good manufacturing practices. It is through them that high quality goods are produced, and it is the companies' responsibility to meet consumers' needs and preferences since the very beginning of the process, while making sure it follows all the rules and is not harmful to the people and environment around. Moreover, there are a number of benefits to good manufacturing practices, including the creation of jobs and the growth of the economy by generating productivity, stimulating research and development, and investing in the future.

B&J's recognizes that it has greenhouse gas emissions associated with its operations, having since the beginning the concern of tackling the problem and fighting for climate justice. The brand has always worked with the farmers to reduce methane emissions from farms and it is also constantly promoting petitions urging world leaders to tackle the issue for people to sign

(e.g. The Climate Movement) (Ben & Jerry's Website, 2017). It is safe to say that *B&J's* is fully committed to reduce its footprint throughout its operations, as this objective is embedded on its business model. In fact, *B&J's* leverages its unique resources and expertise to create economic value by creating environmental and social value. As such, there are three manufacturing practices that can be highlighted as sources of shared value: **productive waste**, **cleaner greener freezers** and **responsibly sourced packaging**.

1. Productive waste

B&J's says it “*is passionate about making their waste less wasteful*”. And with that in mind, the brand sends the dairy waste from its ice cream plants back to two of the farms that supply *B&J's* (Caring Dairy program). That waste is put into methane digesters with other farm waste, where it generates energy to power the farms. One example of this is the Chunkinator that was built in the Netherlands factory, which is a reactor that turns ice cream waste and wastewater into biogas that works as energy helping to power the factory (Ben & Jerry's Website, 2017).

2. Cleaner greener freezers

B&J's not only makes sure it makes its ice cream in the nicest way possible, as it makes sure that the freezers cabinets (in which its products are stocked) are climate-friendly and energy efficient. It all started in the US, in 2011, with the use of hydrocarbon (HC) freezers. HC freezers are significantly more energy-efficient and use a natural hydrocarbon refrigerant with lower global warming potential than the hydrofluorocarbon (HFC) refrigerants commonly used. Years after, HC freezers started to be used in its scoop shop in Europe as well (Ben & Jerry's Website, 2017).

3. Responsibly sourced packaging

B&J's paperboard packaging is *Forest Stewardship Council* (FSC) certified (with the exception of a small amount of packaging for the quart containers). A *FSC* certification means that the materials in the paperboard come from forests that are managed for the protection of wildlife habitat, maintenance of biodiversity, and other forest sustainability criteria. Moreover, *B&J's* is ensuring that it keeps up with recent developments in order to reach the step of having its packaging made from renewable materials that are safe, biodegradable and fully compostable (Ben & Jerry's Website, 2017).

Overall, one can state that having social impact “built” into the core of its business model means that, as *B&J's* innovates, it directly impacts the whole system. Meaning that, as *B&J's* grows its business, it also grows its environmental impact by reducing its footprint. Furthermore, it is that willingness to keep improving its manufacturing practices that *B&J's* positively contributes to this linked prosperity by the **creation of shared value**: benefiting the involved stakeholders (e.g. communities, suppliers and employees) and *B&J's* as a business (through its enhanced reputation, economic value and competitiveness).

Concluding, there is always room for advances in the future through the development of new technologies, and with those inventions and solutions it is always possible to finding “a better way” and make a mark in the world.

3.1.3. Fair Trade (Teresa Póvoas)

Reasoning behind the choice: As a management student I truly believe that we have a crucial role in the positive development of economies. By being consumers, we have the power to choose what principles we want to defend and we have possibility to make the difference in the lives of the people that work in the production process. Exploring the Fair Trade in this work project is crucial due to the impact that this certificate has on sustainable

local economies as well as in the social development of these communities. Additionally, increasing awareness in the consumer may influence the market, which is fundamental to empower industries and economies to change their habits and have a positive role in the society.

Fair trade is a “*trading partnership, based on dialogue, transparency and respect, that seeks greater equity in international trade. It contributes to sustainable development by offering better trading conditions to, and securing the rights of, marginalized producers and workers*” (World Fair Trade, 2009).

Fair trade is grounded in the following core principles:

1. ***Market access for marginalized producers:*** helps marginalized small producers that otherwise would be excluded from the markets, and, consequently, enables the social development of the region;
2. ***Sustainable and equitable trading relationships:*** a long-term relationship that empowers cooperation through information sharing and planning and also through the recognition of decent working conditions;
3. ***Capacity building & empowerment:*** companies assist the producers in order to help them in developing a better production capacity
4. ***Consumer awareness raising & advocacy:*** companies create consumers’ awareness regarding the social conditions and culture of the regions
5. ***Fair trade as a “social contact”:*** promotes partnerships between companies and producers. The former will provide fair prices, pre-finance and offering support for capacity building, while it allows producers to improve their social and economic conditions (World Fair Trade, 2009).

Additionally, there are more fair trade dimensions related with labour conditions such as: no discrimination, safe and hygienic environmental work conditions, right of freedom of association, respect for children rights as well as environmental sustainability (improvement on environmental footprint of production and trades).

There are two distinct ways of implementing fair trade:

1) The integrated supply chain route, which consist in companies that have fair trade at the core of their mission and intend to improve producers' social and economic conditions while combining their marketing strategy with raising awareness, by campaigning for this cause.

2) The product certification route, which consists in having products that had been produced and commercialized according with a certificate of international standards (World Fair Trade, 2009).

B&J's adopted all the fair trade standards across Europe in 2011, and globally in 2013, by implementing the product certification route of fair trade. This means that, since 2013, *B&J's* is fully fair trade, meaning that every ingredient they use is fair trade certified (Fair Trade International, 2010).

Fair trade has led the way in encouraging and enabling consumers to take regard of the social, economic, and environmental consequences of their purchasing. This involves working directly with farms and suppliers to ensure that all the ingredients comply with fair trade requirements. This is directly related with the social mission of *B&J's*, which recognized the role that businesses have in societies, and tries to create innovative ways to improve the quality of life at a global scale. In 2005, "*Ben & Jerry's was the first ice cream company in the world to use fair trade certified ingredients and today it is moving ahead as the first ice cream company to make such a significant commitment to fair trade across its global portfolio*" (Fair Trade International, 2010).

As previously mentioned, shared value is implemented by redefining productivity in the value chain. In fact, all the production process of a company can bring social problems at different levels, such as outsourcing suppliers, working conditions and equal treatment in the workplace. Fair trade can be a driver to easily create shared value, which, in consequence, could foster social and economic improvements. On the one hand, *B&J's* avoids transaction costs that can reduce the cycle time on production process by having local suppliers, and, on the other hand, supports local companies to foster their learning process and innovation. This promotes the following fair trade principles: marginalized producers are considered as part of the market, sustainable and equitable trading relationships and, also, capacity building & empowerment of suppliers. It will also generate benefits to businesses, as well as, improve living conditions of communities, which is in accordance with the value creation model (Porter & Kramer, 2011).

Additionally, the employees' productivity is positively influenced by wages, work safety, hygienic conditions and training. Fair trade principles are grounded in providing value to the employees by trying to give them better social and economic conditions. Thus, value will be generated to the company with an increase in employees' efficiency and productivity. This illustrates that the fair trade principles and the shared value model are intrinsically connected and it is favourable to combine them to create a new and better economic model (Porter & Kramer, 2011).

3.1.4. B-Corporation (Inês Moreira)

Reasoning behind the choice: In my opinion, it is crucial to understand how corporations can align their businesses with societal needs. These win-win situations are key for ensuring a business' sustainability, in both profit and impact terms. As such, to study how B-Corporations are structured is a rather interesting exercise, as it might work as a benchmark analysis for the remaining companies to follow this trend.

B Lab is a non-profit organization that “*serves a global movement of people using business as a force for good*” (B-Corporation Website, 2017). This global movement gained form by certifying companies that meet rigorous standards of social and environmental performance, accountability, and transparency (B-Corporation Website, 2017) as B-Corporations (**B-Corps**).

Having *B&J's* placed its social mission in equal importance to its product and economic missions (and having developed their business taking that in consideration), it has been distinguished as B-Corp in 2012 (Ben & Jerry's Website, 2017). To gain this certification, impact reports are made, evaluating companies' performance on dimensions like environment, worker, community and governance. *B&J's* overall score of its impact report was 110 (80 out of 200 is eligible for certification) (B-Corporation Website, 2017).

Having been acquired by *Unilever*, *B&J's* is subject to additional legal requirements to remain a certified B-Corp, by having its impact report revisited every two years (while the remaining B-Corps are subject to random audits during each term), and with an increased transparency required, namely on the company's ownerships structure and full B Impact assessment (unlikely the other B-Corps, which are only required to publish the summary information).

Overall, B-Corps are companies that work in line with the concept of shared value, as their business models generate value for the all the involved stakeholders. In fact, B-Corporations illustrate the transformation from shared value initiative to shared value company (Shared Value Initiative, 2014). This means that B-Corps, including *B&J's*, are often distinguished as “good companies” that embrace value in all their value chain.

3.2. Ben & Jerry's Around the World

Despite *B&J's* acquisition by *Unilever* in 2000, an independent Board of Directors was created to ensure the preservation and expansion of the company's three-part mission. *Unilever* has integrated *B&J's* into a company-wide sustainability strategy (*Unilever's* "Sustainable Living Plan"), having increased the distribution range and channels of *B&J's* products by addressing the customer interface element in the business model, and increased its market share and sales substantially on a global scale (Ben & Jerry's Website, 2017).

In order to evaluate the effectiveness of the communication of *B&J's* three-part mission to the public and if the development of socially/environmentally responsible initiatives has a direct effect on sales, the performance of the most active *B&J's* around the world will be analysed. This analysis is an attempt to connect CSR with profitability.

B&J's campaigns are stronger in the US and more recently in Australia, as well as across 4 key countries in Europe: UK, Netherlands, France and Sweden (Ben & Jerry's Website, 2017).

In the US, *B&J's* supports several initiatives on **marriage equality**, **social justice**, **democracy**, **climate change**, and many others. The brand's sales in the country in 2016 reached a total of 5.47\$ Billion dollars² (Statista, 2017). This allowed for a consolidated market position (3rd in terms of sales) and an 8,7% market share (Appendix 3).

B&J's **Australia** is highly associated with support for **marriage equality**. In fact, the ice cream company has been active in advocating same sex marriage since 2013. In the Australian market, *Unilever Plc* is the leader in the category of "Impulse Ice Cream-Single Serve" (Ken Research, 2016), with *B&J's* placing 3rd in "Company Shares of Impulse Ice Cream: % Value 2013-2017" (Euromonitor, 2017).

² Total U.S. sales through supermarkets, drugstores, mass market retailers, military commissaries and select club and dollar retail chains for the 52 weeks ended January 22, 2017.

In regard to the **UK**, several initiatives were developed to support **social entrepreneurship**, **refugees' aid**, and **marriage equality**, among others (Ben & Jerry's Website, 2017). In a ranking made in 2016 for the most used brands of ice cream tubs and blocks in the UK, *B&J's* ranked 1st, with an estimated number of 7.2 million consumers, becoming the leading ice cream tub brand in the United Kingdom, by number of consumers (Statista, 2017).

In the **Netherlands**, *B&J's* established a partnership with an organisation for **refugees** seeking asylum and also actively supports **marriage equality and democracy** (Ben & Jerry's Website, 2017). *Unilever* Netherlands accounted for a value share of ice cream and frozen desserts of 65% in 2016, making it the market leader. *Olá*, *Hertog*, and *B&J's* are not only well established in the Dutch market, which is highly concentrated, but also the Dutch favourites (Appendix 4). This preference is said to be due to their "*large scale campaigns and advertising activities*" (Euromonitor, 2017). However, *B&J's* in the Netherlands might also be benefiting from the fact that "*Dutch consumers prefer to buy premium products in the ice cream market*" (Global Data Report, 2016).

B&J's **France** has developed initiatives around **marriage equality** and **democracy** (Ben & Jerry's Website, 2017). According to Euromonitor (2017), "*the most dynamic player was mainly Unilever France thanks to the ongoing breakthrough of its super premium Ben & Jerry's brand*".

Concerning **Sweden**, *B&J's* has defended **refugees' aid** and **marriage equality** (Ben & Jerry's Website, 2017). *Unilever* Sverige is the leader in the ice cream market, with a value share of 42% and an increase in value sales of SEK24 million in 2017 (Euromonitor, 2017). Research shows that *Unilever* grew primarily thanks to "*its premium brands that are slightly better than standard brands such as Ben & Jerry's*" (Euromonitor, 2017).

All in all, demonstrating a relation between higher sales for *B&J's* and being socially and environmentally active is a challenging task. In fact, many are the specificities of each market and few are the insights on consumers and factors at play on the above mentioned markets. However, the active and continuous support and development of social and environmental initiatives seems at least to be positively correlated with a superior market performance.

3.3. Ben & Jerry's Portugal

After being acquired by *Unilever*, *B&J's* was able to enter the Portuguese market in 2004, where it opened 3 stores: Chiado, Centro Comercial Colombo and Cascais. These scoop shops did not correspond to the expectations on sales, due to the lack of brand awareness in Portugal, and so they were closed in 2010, not having re-opened ever since (Faria, João, 2017, pers. commun.).

B&J's ice creams in Portugal are distributed through **retailers and wholesalers** for In-Home consumption (such as *Pingo Doce*, *Continente*, *El Corte Inglés* and *Jumbo*) and in **cafés and restaurants** for Out-Of-Home consumption.

Looking at the brand's sales evolution in Portugal, it can be divided into two main periods: 1) from 2005 until 2014, with a Compound Annual Growth Rate (CAGR) of 5,7% (during this period, 2012 was the best year, with a boost in sales (1 011 thousand €), due to the entrance in *Olá's* price board); and 2) from 2014 until 2016, with a substantial CAGR of 71,1%. Part of this sales' increase can also be explained by the placement of *B&J's* product offer separate from *Olá's* ice creams, on the side of the price board, following a selective approach (Appendix 5). Last year, the brand was able to achieve a market share of approximately 1,5% of the Portuguese Ice Cream Market (Faria, João, 2017, pers. commun.). Until October 2017, the brand has conquered 2,4% of market share (Faria, João, 2017, pers. commun.).

Additionally, to boost brand awareness and presence, *B&J's* has been focusing on partnerships (Faria, João, 2017, pers. commun.). Since June 2017, a partnership with *Sushi@Home* was developed to take advantage of the e-commerce/home delivery channels that have been increasingly growing in the last years (Wallace, 2017). Although sales have not boosted significantly (since *Sushi@Home* only owns 3 shops/delivery points, not having a strong distribution channel), *B&J's* considers this partnership a success, as there was a conversion rate of 5% of customers, meaning that 5% of sushi customers are now ordering *B&J's* as a dessert (Faria, João, 2017, pers. commun.).

Moreover, this year, *B&J's* Portugal started advertising in *Fox* channels, promoting the idea of ice cream consumption throughout the year, such as when watching films or TV series (Faria, João, 2017, pers. commun.).

3.3.1. Ben & Jerry's Portugal and CSR

Opposed to what happens in other markets, *B&J's* Portugal rarely engages in activities/initiatives that create a positive social impact. Instead of having a sustained presence on social and environmental events, the brand invested solely in one marketing action with social impact: “*Dia da Gratidão*”, in which free ice creams were distributed to society heroes, including workers and volunteers of *INEM*, *Associação Moinho da Juventude*, *AMI*, *Associação SOS Animal*, *Associação CASA* and *Bombeiros Lisbonenses* (Faria, João, 2017, pers. commun.).

3.4. Pyramid of Corporate Social Responsibility Applied to Portugal

In order to compare the Portuguese case with other markets in which *B&J's* operates and is successful, Carroll's Pyramid of CSR was applied. This model was chosen as a diagnosis tool because it clearly differentiates the economic side and the “be a good corporate citizen” side,

making the “Portuguese *B&J’s* problem” clear. The fundamental difference between Portugal and the remaining *B&J’s* markets seems to be that Portugal is failing to implement and communicate social and environmental initiatives.

Although the model’s four components will be treated separately for discussion purposes, they are not mutually exclusive or comparable. Even so, an individual consideration of the different components helps analysing the different types of obligations, which are in a constant but dynamic tension with one another (Carroll, 1991).

3.4.1. Economic

In regard to *B&J’s* Portugal, there are currently 3 product types: Ice Cream Pints (with a recommended retail price (RRP) of 6,50€), Mini Cups (RRP of 2,50€) and Ice Cream sandwiched between Cookies (RRP of 2,50€) (Appendix 6). Despite the low market share (1,5%) in 2016 (Faria, João, 2017, pers. commun.), *B&J’s* has been able to grow in Portugal, having increased from 47 000 € in sales in 2005, to 1 662 000 € in 2016. Thus, *B&J’s* is complying with its economic obligations, by making a profit out of the business, ensuring its economic sustainability.

3.4.2. Legal

B&J’s ice cream sold in Portugal is fabricated in the Netherlands, and obeys to the European Union’s laws in regard to pesticides, which are rather strict (Erbach, 2012) and protective of consumers. *B&J’s* Portugal meets its legal responsibilities, and performs in a manner consistent with expectations of government and law. It does so by complying with local regulations, conducting itself as a law-abiding corporate citizens, by fulfilling all its legal obligations to societal stakeholders and by providing goods and services that at least meet minimal legal requirements (Faria, João, 2017, pers. commun.).

3.4.3. Ethical

B&J's in Portugal also meets its ethical responsibilities, including **1)** performing in a manner consistent with expectations of societal moral and ethical norms (such as ingredients sourcing and purchasing); **2)** recognising and respecting new or evolving ethical/moral norms adopted by society (sustainable manufacturing, reducing its footprint, using climate-friendly and energy efficient freezers on the production process, and using responsibly sourced packaging); **3)** preventing ethical norms from being compromised in order to achieve business goals, being good corporate citizen by doing what is expected morally or ethically (just like using cage free eggs and supporting mandatory GMO labelling legislation) and **4)** recognising that business integrity and ethical behaviour go beyond mere compliance with laws and regulations (supporting fair trade and helping farmers to move toward more sustainable practices) (Ben & Jerry's Website, 2017).

3.4.4. Philanthropic

As previously mentioned, *B&J's* worldwide is a strong supporter of social and environmental causes, having joined and developed several initiatives in the past. In addition, the brand has also incorporated their values in their production process (Ben & Jerry's Website, 2017).

Although the above mentioned characteristics of the brand may be obvious in other markets where the company operates, *B&J's* Portugal has not been able to fully succeed in its market. Additionally, most consumers are not aware of the social and environmental mission of the brand (which will be analysed in Chapter 6). This is due, not only to an ineffective communication approach, but mainly to an inexistent social and environmental intervention in Portugal.

Overall, *B&J's* Portugal has not yet been able to fulfil the pyramid's four constituents since it has not "reached" the top of the Carroll's Pyramid of CSR - the philanthropic level - which might explain the low penetration in the Portuguese market.

4. Portuguese Situation Analysis

In this chapter the analysis will be focused on whether there is an opportunity for *B&J's* to engage in impactful initiatives, in order to reach the philanthropic part of the CSR pyramid. Thus, the following factors will be considered: the characteristics of the Portuguese ice cream market (Section 4.1.), the existing competition (Section 4.2.), the brand's target (Section 4.3.), and consumers' trends (Section 4.4.).

4.1. Ice Cream Market

A study from Canadean (2015) divides the Portuguese Ice Cream Market into the following three categories: 1) take home and bulk ice cream; 2) impulse ice cream and single serve such as sticks and cones; and 3) artisanal ice cream. *B&J's* competes in the first category, which is the one expected to have the fastest growth of the three between 2014 and 2019 (Canadean, 2015). Moreover, there is margin for growth as the ice cream market in Portugal is forecasted to grow at a CAGR of 2,8% in US\$ terms during the period between 2014 and 2019 (Canadean, 2015). Additionally, take-home and bulk ice cream represented 53,9% of the total sales volume in Portugal in 2015, and is forecasted to grow at a CAGR of 3,6% in volume terms during the period 2014 to 2019 (Canadean, 2015).

4.2. Competition in the Ice Cream Market

Kim & Mauborgne (2004) defend that “*competing in overcrowded industries is no way to sustain high performance. The real opportunity is to create blue oceans of uncontested market space*”.

Following a **blue ocean strategy** companies can make competition irrelevant by creating new and untapped market space, creating demand and thus the opportunity for highly profitable growth. Most blue oceans are created from within red oceans by expanding existing boundaries; others go beyond these boundaries (Kim & Mauborgne, 2004).

Currently, the ice cream industry is crowded and, as a result, profits and growth are reduced, which mean that it resembles a **red ocean**: industries’ boundaries are defined and accepted, and the competitive rules of the game are known. In these industries, companies outperform their rivals to grab a share of existing demand. According with a study on the *Global Ice Cream Market 2017-2021* (Technavio, 2017), this market is highly fragmented as a result of several large and small-scale competitors. The competition is primarily based on price, quality, product differentiation, distribution, and promotion (Technavio, 2017).

B&J’s Portugal is currently competing in a red ocean; however, it can leverage its values, and its social and environmental mission to engage in a blue ocean strategy. It can do so by going beyond the conventional way of making business in this market and building a joint value creation with customers, in which there is a reciprocal creation of value between the company and society. This would work as a competitive advantage, since CSR is central to *B&J’s* mission (and not to any other ice cream brand operating in Portugal).

When it comes to *B&J’s* competition, *Häagen-Dazs* and *Quinta dos Açores* can be considered the two main direct competitors; due to the similar price ranges³ (in case of

³ Retail Prices per litter of Häagen-Dazs, B&J’s and Quinta dos Açores, respectively: 13,38€, 13€ and 10,98€.

Häagen-Dazs, as it is also a premium ice cream brand) and the differentiated value proposition (in case of *Quinta dos Açores*, by also having a distinctive proposition - being locally-sourced -, although distinct to that of *B&J's*).

In Portugal, in the one hand, ***Häagen-Dazs*** sells in-home (*Pingo Doce*, *Continente*, *El Corte Inglés*, *Jumbo* and gourmet shops) and out-of-home, owning their own stands (currently having 10 shops). The brand has a larger variety of products and flavours compared to *B&J's* Portugal since it also offers sundaes, shakes, smoothies, cakes and coffee frappes in its stores (*Häagen-Dazs Website*, 2017).

Quinta dos Açores, on the other hand, is distributed through retailers and wholesalers for in-home consumption (*Pingo Doce*, *Continente*, *El Corte Inglés*, *Jumbo* and *Loja dos Açores*) and have their own two Boutiques in São Miguel and Terceira Islands, since 2012, for out-of-home consumption (*Quinta dos Açores Website*, 2017).

The *Unilever Brand Audit 2017* (Faria, João, 2017, pers. commun.) uses the “*brand equity (BE) score 2.0*” to measure effectiveness in meeting customer needs. This score takes into consideration the average of a brand’s differentiation, performance, quality, appeal and buzz. According to this consumer insight study, in 2016, *Carte D’Or*, *Magnum* and *Häagen-Dazs* had the highest BE scores (60/100, 53/100 and 52/100, respectively), while *B&J's* placed fourth with a BE score of 37/100. From 2015 to 2016, most of the brands experienced a decrease in their score, except for *Häagen-Dazs* and *B&J's* (Appendix 7).

The same brand audit revealed that the value shares per brand in 2016 (Appendix 8) were the following: *Magnum* and *Carte D’Or* were the market leaders (with 16% market share each), followed by *Cornetto* (6%). *Häagen-Dazs* ranked four (with 4,2%), and *B&J's* was the least relevant brand (with 1,5% market share, which is superior to the slice of value it obtained in

2015: 1,1%). Private labels have a strong presence in Portugal, having accounted for 38,5% of total value generated in 2016.

4.3. Target Audience

Millennials are the brand's target, as this age segment is the one most likely to feel identified with the brand's mission and values (Faria, João, 2017, pers. commun.).

Millennials (or Generation Y) are defined as someone aged between **18 and 34 years old** (those who were born between 1983-1999) (Gulyàs, 2015). Millennials tend to prefer honesty, authenticity, practicality and interactivity. They are **highly attached to their phones** and **social networks** and **seek interaction and co-creation**. As such they want companies that offer personalised and unique experiences (Euromonitor, 2015).

Millennials also look for **social justice in the products** they buy, and even originate pressure for some traditional sectors to reinvent themselves (Euromonitor, 2015). In other words, it is no longer just about whether a person likes the product or service, it became about whether they like the **company's stance on certain pertinent issues**. According to a study developed by Deloitte (2014), millennials **value more the purpose of the business rather than the profit**, and they are more interested in companies that care about their employees and contribute to the society.

A study conducted by Morgan Stanley (2017) showed that this generation is more **conscious about the social and environmental impact they have with their choices, valuing the companies that address those issues too**. The same study states that 61% of millennials have taken at least **one sustainability oriented investment action** in 2016. The previous study adds that in 2015, 75% of the enquired millennials has affirmed to **be willing to pay more for sustainable products** (which is a 25% increase compared to the previous year).

Thus, taking into consideration millennials' many specificities, it seems that the Portuguese that belong to this age interval, once aware of *B&J's* mission, should attribute more value to its products and perhaps start buying the brand's ice cream or increase their purchasing volume and/or frequency.

4.4. Consumer Preferences and Trends

Bearing in mind that the world is in constant change and so are consumers' preferences, if companies want to keep succeeding, they must analyse and anticipate emerging trends so as to be prepared to tackle them. However, while some of these trends will follow a pattern of predictable growth, others may take more surprising paths (Benson-Armer *et al.*, 2015).

4.4.1. Consumption Tendencies

Deloitte (2017) studied new consumption tendencies in Portugal. From those identified, the following were considered relevant for the situation analysis: **health & well-being** (*"I buy products that I identify as beneficial to health (e.g. biological, functional), avoiding elements that I consider harmful, guaranteeing a higher quality of life, without compromising the pleasure of eating"*), and **trust** (*"I know and I am interested in the food producing companies that I use and value their social and environmental responsibility, because they guarantee the sustainable permanence of the planet and of my community"*).

The above mentioned increase in health awareness is shaping consumers' decisions. *B&J's* has already suffered from the arising health concerns in the mid-1990s, experiencing decreasing sales (Grant, 2001) opposite to the increase on the sales of fat-free ice cream and frozen yogurt (CNBC, 2017). Nowadays, **health-conscious consumers are still arising**, especially among millennials (Nielsen, 2016). Healthy food for millennials has to be natural or organic and they are ready to **pay a premium price for it** (Euromonitor, 2015). In the

specific case of Portugal, there is an increasing health awareness, which surpasses the European average (Nielsen, 2016). This can constitute both a threat (as *B&J's* ice cream is not organic) and an opportunity of growth (by developing product offerings so as to meet this trend and the ever-changing consumers' needs) to *B&J's* worldwide.

Moreover, in the era of transparency, trust is key to success. Consumers are increasingly aware of the existence of a limited availability of natural resources and therefore they have been adopting a more **conscious consumption**, preferring the more transparent firms. They have been increasingly demanding access to information related to the **origins and transformation of products along the value chain** as well as **the values and ethical standards** of companies and the **impact they have on communities and on the planet** (Deloitte, 2017). According to a study from Sustainable Brands (2015), global consumers feel a personal **responsibility to address social and environmental issues** and look to companies as partners in progress. Considering *B&J's* concern with its manufacturing practices and ingredients' sourcing, those who are more conscious consumers might, after perceiving the existence of the previous, develop a preference for the brand's products and feel that they positively contribute to the welfare of all by acquiring these products.

Concluding, *B&J's* Portugal already has the ability to meet one of these trends, and, in fact, if the brand would effectively communicate its mission, and manufacturing and ingredient sourcing practices, this could increase consumers' **trust** in its products. However, the **health and well-being** trend might represent a threat if *B&J's* is not able to shape its offer to current demand.

4.4.2. Socially Responsible Behaviours

Besides consumption tendencies, it is also important to analyse the overall involvement of Portuguese consumers with the society and how these react to products from socially

responsible firms - both in terms of buying intention and involvement levels with the social and environmental causes these firms may support.

Despite the increasing appreciation and value that Portuguese attribute to social and environmental causes, research shows that most **Portuguese are still not involved with those problematics** (Deloitte, 2017). According to “*Primeiro Grande Inquérito sobre Sustentabilidade*” (Schmidt, 2016) called, only a third of the inquired Portuguese claims to be member of a non-profit organisation, and an even a smaller percentage (22%) does voluntary work in non-profit organisations (being churches the most common ones). Additionally, it was found that more than 90% of Portuguese do not support any NGO nor have signed any petition for a social or environmental cause in 2016 (Observatório do Consumo Consciente, 2017). This leads to the belief that there is still room for growth in the involvement of Portuguese with their community and/or with initiatives. In turn, this may represent an untapped opportunity for *B&J's* to capitalise on their social and environmental mission, and as a result, increase sales.

When it comes to examples of social and environmental **initiatives/activism/protests in Portugal**, data from 2005 shows that 40,6% focused on social issues (concerning better life conditions: housing, sanitation, safety, quality of life) while 32,7% were related to education topics (Mendes *et al.*, 2005). Even so, most of them are punctual (56%). Additionally, protests on social and environmental causes seem to be of short duration, while those of a political nature typically last longer. They are mostly held in Lisbon and Oporto (46,4%) and the most common forms are parades and manifestations (25%), and petitions (25%) (Mendes *et al.*, 2005).

Moreover, in Portugal, 45% of people affirm being **willing to pay more for products and services done by companies committed to having a positive social and environmental impact** (Deloitte, 2017).

5. Approach to the Problem: Corporate Societal Marketing

Fuller (1999) has pointed out that a successful sustainable marketing communication strategy involves sending out emotionally charged messages and creating a dialog with consumers. Those dialogs have to deal with matters connected to sustainability and how an individual person can make a difference by considering those matters in his or her buying behaviour.

The past chapters have made clear that *B&J's* has been struggling to engage in such a marketing communication: one that informs consumers of its social mission. By taking into account the market conditions (Chapter 4), it is possible to conclude that there is indeed margin to capitalise on this differentiated value proposition. By taking this into consideration, the approach to the problem was based on the following hypothesis:

If B&J's engages in CSR activities that create value for the community, and if Portuguese consumers perceive their beneficial effects, their purchasing intentions will be positively impacted.

Given so, the challenge *B&J's* faces is to boost consumer awareness of their social and environmental concerns. Therefore, the brand should aim to go beyond conventional marketing and start engaging consumers in social and environmental initiatives in a more sustained way.

According to the **customer-based brand equity** model (Appendix 9), the power of a brand lies in what customers have learnt, felt, seen and heard about the brand as a result of their experiences over time (Keller, 2001). This model argues that there is a “brand ladder” that needs to be established by companies in order to create a strong brand:

- 1) **Brand identity:** creating brand awareness and salience⁴;

⁴ Brand salience is the degree to which your brand is thought about or noticed when a customer is in a buying situation (Branding Strategy Insider, 2010).

- 2) **Brand meaning:** creating strong, favourable, and unique brand associations;
- 3) **Brand responses:** exploiting how consumers respond to the product, by including judgements - on quality and credibility -, and feelings;
- 4) **Brand relationships:** referring to the relationship and level of identification a consumer has with a brand, impacting loyalty, attachment, sense of community and engagement.

Since the first three steps are well defined by *B&J's* worldwide, what needs to be improved in Portugal is the final step of the ladder: the brand relationship.

In order to apply the joint value creation model to *B&J's* Portugal case, and acknowledging that - according to Keller (2001) - it is the brand relationship that needs to be further explored, the possible CSR implementation strategies (Section 2.4. - Implementing Corporate Social Responsibility) were analysed.

As the aim of this joint value creation model is to stimulate the engagement of consumers on social and environmental causes, it would be out of scope to create value through fund and in-kind contributions or donations (excluding corporate cause promotion, cause-related marketing and corporate philanthropy). Moreover, the goal is to involve consumers and not employees, being community volunteering inappropriate for this purpose. Taking into consideration that *B&J's* already undertakes some socially responsible business practices, and that those do not engage consumers on being part of the joint value creation model, the most suitable approach is to follow a **corporate societal marketing strategy**. By implementing this strategy, *B&J's* brand relationship is expected to improve due to the clarifying of its positioning and through the engagement of current/potential consumers on the fulfilment of the brand's social mission.

In fact, Heslin & Ochoa (2008) defined the involvement of customers as one of the seven strategic CSR principles. The authors claim that doing so is not only relevant for the empowerment of consumers, but is also an inexpensive way to increase customer loyalty.

5.1. Corporate Societal Marketing

The selected strategy to achieve competitive differentiation is named **Corporate Societal Marketing (CSM)**, which encompasses marketing initiatives that have at least one non-economic objective related to social welfare and use the resources of the company and/or one of its partners (Drumwright & Murphy, 2001).

The use of CSM is expected to **increase sales and market share** (Drumwright, 1994), since it:

1) enhances corporate **reputation** (Adkins, 2004); 2) defines and enhances **corporate image** (Andreasen, 1996); 3) **motivates the workforce** (Drumwright, 1996); 4) creates a differential **advantage over competitors** (Lichtenstein *et al.*, 2004); 5) builds an emotional, even spiritual, **bond with consumers** (Meyer, 1999); and 6) helps **deflect criticism** and **overcome negative publicity** from an unexpected event or tragedy (Dawar & Pillutla, 2000). Consequently, it is expected that engaging in such a strategy will lead to an improvement in **brand positioning** and **brand preference**, which will ultimately result in a **boost in sales** (Kotler & Lee, 2008). Additionally, corporate activism that is aligned with the values of the company and consistent with an individual's own beliefs, leads to significant **increases in purchase intentions** in the 18-25 and 26-35 age ranges (Dodd, 2015). The level of customer awareness, participation and commitment is a crucial component, as CSM is only effective when it links a brand to a core customer value (Broderick *et al.*, 2003).

5.2. Primary Data Collection Strategy

In order to effectively implement a CSM campaign it is imperative to understand how the brand is perceived by Portuguese consumers, as well as to define which strategy would best suit the latter. Thus, consumer research is needed in order to identify how the brand should position itself, ensuring that their corporate activities are perceived as responsible from consumers' perspective (Endacott, 2004). As such, the following stages were taken:

1) **Market Research** (analysed in Chapter 6)

A survey was developed so as to understand: 1) the buying behaviour of ice cream in terms of preferred brands and factors that influence the buying decision; 2) the buying behaviour behind the purchase of *B&J's* and the attributes given to the brand; 3) the importance given to CSR; 4) the level of familiarity of *B&J's* CSR activities; and 5) the potential engagement of consumers on social and environmental initiatives.

2) **Pilots**

Two pilots were implemented in order to test consumers' engagement and to try to measure the potential change in their perception of *B&J's* and intention to buy:

- 1) **Social Pilot** (analysed in Chapter 7), with the purpose of assessing the level of acceptance of a CSM initiative related to a civic cause;
- 2) **Environmental Pilot** (analysed in Chapter 8), aiming to evaluate if there is a positive impact in brand reputation as well as in purchasing intentions when consumers engage in a CSM initiative.

Both the market research and the pilots are key to provide insights on Portuguese consumers and to verify whether a joint value creation model would suit *B&J's* needs.

All in all, when *B&J's* develops initiatives that positively impact the community and appeal to the target market, it can potentially create a stronger brand relationship. Additionally, as CSM literature predicts, an increase in sales may arise, allowing the brand to invest more in these initiatives, keeping an ongoing joint value creation model. Ultimately, by demonstrating that creating positive social impact can lead to the achievement of better financial results, *B&J's* can play an important role in leading other companies to follow and to do the transformation of the market towards a more sustainable version.

6. Quantitative Research

To understand the situation “as is”, a primary data collection was undertaken. The aim was to understand consumers’ buying behaviour, knowledge and perceptions on *B&J's*. Additionally, some hypotheses were proposed and validated with the answers.

6.1. Methodology and Questionnaire

The survey was conducted online using Qualtrics (Appendix 10), and was available during approximately fifty days, targeting any age but with a special emphasis on *B&J's* target (18-34 years old).

To ensure robust results, the approved 5-point Likert scales were applied to measure respondents’ level of agreement with statements (Alreck & Settle, 1985). Given so, scales were applied to measure **perceived quality**, **brand loyalty** and **brand reputation** (following Walsh & Beatty, 2007), as well as **CSR attributes** (according to Turker, 2009). As the scales were defined in English, and the sample was Portuguese, care was taken to ensure translation equivalence. Afterwards, SPSS was used to analyse the data.

6.2. Sample

All responses were anonymous and out of the 440 answers of the questionnaire, only 333 were considered since the others did not answer the totality of the survey. The aggregate answers are fully available in Appendix 11.

6.2.1. Sample's Characteristics

The first section focused on demographic information in order to understand the profile of the respondents. Information like age, gender and professional situation was asked, and the sample divided as follows:

Table I: Demographic information of respondents of the comprehensive survey

	#	Gender			Professional situation		
		Female	Male	Rather not to say	Student	Worker	Unemployed
< 18	5	3	2	0	5	0	0
18-25	235	175	58	2	181	47	7
26-34	35	27	8	0	4	29	2
> 34	58	41	17	0	3	51	4
TOTAL	333	246	85	2	193	127	13

To better define profiles, questions related to sustainable behaviours and interests were asked and it was concluded that most respondents claim to behave in sustainable ways: 62% recycle, 83% reutilise shopping bags, and 63% take into consideration water and energy saving in their daily tasks. However, most of the inquired do not have the habit of looking for ingredients' sourcing when buying food (only 32% claim to do it), neither are they involved in activism-

related activities (only 13% have participated in a demonstration/activism initiative, and these are mainly related to environmental issues). When asked about the social and environmental issues that they are most concerned about⁵, most respondents mentioned global warming/climate change (87%), water scarcity (73%) and pollution of the seas/beaches/oceans (71%).

6.2.2. Sample's Buying Behaviour of Ice Cream

The results show that most respondents consume ice cream monthly (50%), followed by those who consume it weekly (26%) and annually (22%). When asked about the places where respondents usually buy ice cream^{6 7}, the most mentioned were ice cream shops and supermarkets (having been chosen by 75% and 72% of the respondents, respectively). This can turn out to be a weakness to *B&J's*, as it does not have its own ice cream shop. Additionally, when asked to recall ice cream brands, only 10% have mentioned *B&J's*, being *Olá* the most mentioned one (having been recalled by 61% of respondents). Regarding *B&J's* main competitors, 10% of respondents mentioned *Häagen-Dazs* when they were asked to recall an ice cream brand (while no one mentioned *Quinta dos Açores*).

Moreover, respondents were asked to rank the factors that most influence them at the time of purchase. From the given nine possible factors⁸, the ones attributed higher importance were *quality* and *price*, both for the target and the non-target respondents. From these factors, *brand values* ranked 5th for non-target and 8th within the target. This leads to the conclusion that *B&J's* price might be a barrier for most consumers, and that the brand's values are still not playing a major role in the Portuguese buying decision.

⁵ Each respondent could pick more than one issue.

⁶ Being the options: supermarkets, ice cream shops, ice cream vans and cafés & restaurants.

⁷ Each respondent could pick more than one buying place.

⁸ Factors: price, package, quality, image, availability of flavours, brand values, promotions, point of sale, vegan.

6.2.3. Sample's Buying Behaviour of Ben & Jerry's

The results show that most respondents know the brand *B&J's* (92%), although less claim to buy it (40%). When asked about the reasons for not buying *B&J's*⁹, most respondents mentioned the high price (61%), the preference for other brands (37%) and the lack of availability of the brand on restaurants/cafes (12%). For those who buy it, the reasons that most motivate consumers to opt for *B&J*⁹ are the flavour (93%), the use of fair trade ingredients (47%) and the importance given to brands that associate themselves with values and causes (27%).

6.3. Main Findings

A test of reliability using Cronbach's alpha (Appendix 12) was used to measure the internal consistency of the questionnaire, making sure all the questions for each variable could be combined. By doing so, and after checking that alphas were above 0,70 (necessary criteria for being considered a suitable variable), the following variables were created:

⁹ Each respondent could pick more than one reason.

Table II: Variables' name, description and questions of the comprehensive survey

Variable	Description	Used scales
Product quality (PQ)	To verify whether consumers perceive <i>B&J's</i> as a quality product, regarding its flavour, used ingredients, design, price and flavour portfolio	<ol style="list-style-type: none"> 1. <i>B&J's</i> ice creams have a pleasant flavour. 2. <i>B&J's</i> offers high quality ice creams. 3. <i>B&J's</i> ice creams are of better quality than other brands. 4. <i>B&J's</i> uses the best ingredients in its ice creams. 5. <i>B&J's</i> develops innovative flavours. 6. <i>B&J's</i> design is adequate. 7. <i>B&J's</i> offers ice creams that are good value for the money. 8. I believe I pay a fair price for <i>B&J's</i> ice creams.
Brand loyalty (BL)	To verify whether consumers are loyal enough to recommend <i>B&J's</i> to a friend	<ol style="list-style-type: none"> 1. I would probably recommend <i>B&J's</i> to a friend.
Reputation (REP)	To verify whether consumers trust <i>B&J's</i>	<ol style="list-style-type: none"> 1. <i>B&J's</i> is a strong reliable company.
Previous Knowledge of <i>B&J's</i> CSR (PK_CSR)	To verify how much information do consumers have about <i>B&J's</i> CSR activities <i>a priori</i>	<ol style="list-style-type: none"> 1. <i>B&J's</i> only uses fair trade ingredients. 2. <i>B&J's</i> encourages its suppliers to use more sustainable practices. 3. <i>B&J's</i> supports local producers. 4. <i>B&J's</i> supports social and environmental causes.

<p>CSR Global Importance (G_CSR)</p>	<p>To verify whether consumers value the existence of CSR in companies</p>	<ol style="list-style-type: none"> 1. It is important for a company to have a CSR policy. 2. I am willing to pay more for a product from a socially responsible company. 3. I would look for alternative products if I realised that a product is not from a socially responsible company. 4. I would buy products from a socially responsible company, even if there were other cheaper options of companies without social responsibility policies. 5. CSR is a decisive factor when buying a product. 6. I would recommend to friends and family a product based on CSR. 7. I would like to take part in a social initiative organized by a company.
<p>After Knowledge of <i>B&J's</i> CSR (AK_CSR)</p>	<p>To verify how consumers perceive <i>B&J's</i> after being told about its CSR activities</p>	<ol style="list-style-type: none"> 1. I believe <i>B&J's</i> would reduce its profits to assure it social and environmental mission. 2. <i>B&J's</i> seems a socially responsible company. 3. <i>B&J's</i> seems to support adequate causes.
<p>Change in perceived quality (PQ_CHANGE)</p>	<p>To verify how the attributed quality changes after acknowledging <i>B&J's</i> CSR properly</p>	<ol style="list-style-type: none"> 1. Taking into consideration <i>B&J's</i> CSR, I consider its ice creams of better quality.
<p>Change of willingness to pay (WPP_CHANGE)</p>	<p>To verify how the willingness to pay changes after acknowledging <i>B&J's</i> CSR properly</p>	<ol style="list-style-type: none"> 1. Taking into consideration <i>B&J's</i> CSR, I would be willing to pay more for its ice creams.

After this step, hypothesis were created in order to understand the importance attributed to

CSR, comparing the answers of *B&J's* target and the remaining sample (meaning that in

each hypothesis, the variable AGE was always added to the model). The detailed ANOVAs and regressions for each hypothesis, for which the confidence level was defined to be 95%, are available in Appendix 13.

H1: Prior knowledge of *B&J's* CSR positively affects the brand's consumption

The estimated model can at least explain some variation of the dependent variable (p-value MODEL < 0,05). This model explains 6,7% of brand consumption ($R^2 = 0,067$), which is rather predictable, as there are other factors (such as price, product availability and brand preference) that are more likely to influence the buying decision. There is statistical evidence that prior knowledge of *B&J's* CSR positively influences brand consumption (p-value PK_CSR = 0,000). On the contrary, age is not a significant variable (p-value AGE = 0,172), meaning that belonging or not belonging to the target does not seem to have a considerable impact on brand consumption.

H2: Prior knowledge of *B&J's* CSR positively affects product's perceived quality

The estimated model can at least explain some variation of the dependent variable (p-value MODEL < 0,05), being the knowledge of *B&J's* CSR policies a meaningful predictor (p-value PK_CSR = 0,000) to explain perceptions on the brand's products' quality. As $R^2 = 0,257$, the model explains 25,7% of the perception on product's quality. Moreover, AGE does not seem to play a role in explaining product quality perceptions (p-value AGE = 0,204).

H3: Prior knowledge of *B&J's* CSR positively affects brand loyalty

The estimated model can at least explain some variation of the dependent variable (p-value MODEL < 0,05), as the knowledge of *B&J's* CSR influences the loyalty towards the brand (p-value PK_CSR = 0,000). The model explains 16,2% of product loyalty ($R^2 = 0,162$) and the perception of the target and the non-target seem not to be significantly different (p-value Age = 0,115).

H4: Prior knowledge of *B&J*'s CSR positively affects reputation

The estimated model can at least explain some variation of the dependent variable (p-value MODEL < 0,05). The R² of this model is 0,285, being prior knowledge of *B&J*'s CSR a significant variable (p-value PK_CSR = 0,000). Moreover, Age is also significant to explain reputation perception (p-value Age = 0,002).

H5: *B&J*'s target is more concerned about global CSR policies

Using an ANOVA, it is possible to verify that the AGE is not significant to explain concerns about global CSR policies (p-value AGE = 0,248). This means that the target seems not to be more concerned than the non-target about global CSR policies (i.e. importance attributed to CSR, preference for sustainable companies, use of CSR as buying decisive factor, etc).

H6: Awareness of *B&J*'s CSR improves the perception of its quality

The estimated model can at least explain some variation of the dependent variable (p-value MODEL < 0,05), being 22,5% of the perception of quality explained by it (R² = 0,225). There is statistical evidence that when consumers become aware of *B&J*'s CSR policies, their perception of its quality improves (p-value AK_CSR = 0,000). Oppositely, age seems not to be a significant explanatory variable (p-value AGE = 0,079) of this model.

H7: Awareness of *B&J*'s CSR programs increases the willingness to pay for its ice creams

The estimated model can at least explain some variation of the dependent variable (p-value MODEL < 0,05), being able to explain 11,6% of the willingness to pay for *B&J*'s (R² = 0,116). It is possible to verify that when consumers become aware of *B&J*'s CSR, their willingness to pay for its ice creams increases (p-value AK_CSR= 0,000). Interestingly, age is a significant explanatory variable of this model (p-value AGE = 0,031), being the non-target more willing to pay a premium price.

6.4. Key Conclusions

The conducted surveys were rather relevant in obtaining further information on Portuguese consumers and, more importantly, to validate the pertinence of this work project.

In fact, statistical evidence suggests that **prior knowledge of B&J's CSR positively influences brand consumption**, and so, making consumers aware of the brand's mission should contribute to an increase in sales.

Moreover, since **prior knowledge of B&J's CSR positively influences brand loyalty**, it is predictable that consumers, once aware of CSR initiatives should either buy less from competitor ice cream brands, or increase their purchasing frequency of B&J's ice cream.

Additionally, in regard to willingness to pay a premium price, results show that, **upon becoming aware of B&J's CSR, consumers are more prone to pay a higher price** for the ice cream. As such, this validates that, exposing consumers to the brand's CSR should contribute to additional sales, as consumers that previously perceived B&J's to be expensive, might become willing to pay its premium price.

All in all, the surveys' results confirm the hypothesis previously proposed¹⁰ and offered insights on the social and environmental issues that most concern consumers, thus opening way for a more effective implementation of the two pilots.

6.5. Limitations

This research aimed to access a representative sample of respondents. However, reaching a reasonable and demographically diverse (wide range of backgrounds, income, ages, gender and occupations) number of respondents is challenging. Accordingly, considering that the

¹⁰ Hypothesis: *If B&J's engages in CSR activities that create value for the community, and if Portuguese consumers perceive their beneficial effects, their purchasing intentions will be positively impacted.*

survey was posted on *Facebook*, most of the respondents in this study arise from personal connections of the four masters' students. This can raise issues about the representativeness of the data.

Other occurrences can have biased the survey's results, such as:

- ❖ When asking if respondents consume *B&J's*, there were three possible answers: yes, sometimes and no. In the analysis, "sometimes" answers were considered as "yes", which can positively bias the real level of consumption;
- ❖ There is a gap between what consumers claim to do and what they actually do, which induces that changes on perception may not be reflected at the buying moment.

7. Social Pilot - Democracy

7.1. Reasoning

When designing a social pilot, three factors were taken into consideration: 1) the social issue to be tackled (defined to be democracy); 2) the age group that would more likely engage in the initiative (found out to be the millennials); and 3) the channel that would generate more impact (social media).

Dodd (2015) stated how corporations are increasingly choosing to take public stances in support or opposition to social-political issues. Those stances are expected to create reactions on consumers, especially when communicated by corporate leaders: CEOs that speak out on social and environmental issues impact consumer attitudes towards the company, increasing consumers' intentions to purchase its products, and influencing public opinion about these issues (Chatterji & Toffel, 2016). Additionally, corporations have the potential to play a critical role in democracy through responsible and transparent public affairs activities (Golan, 2016). Considering that democracy is widely accepted in Portugal (Heimer *et al.*, 1990),

companies that support initiatives to increase voter turnout have margin to capitalise on their position, incurring low risk to be misunderstood.

As mentioned, *B&J's* target are millennials. To involve millennials on democratic issues can be a strategic action due to two main reasons. On the one hand, youth vote is a huge force for social change, since millennials dedicate time to causes they care about and issues that inspire them (Rock the Vote, 2017). On the other hand, Dodd (2015) has discovered that when corporate stances are consistent with an individual's own beliefs, those in the 18-25 and 26-35 age groups are most likely to demonstrate an increased intention to purchase from a company with a stance aligned to their own (8,1% and 21,1%, respectively). Therefore, millennials are not only those more potentially engaged, as well as those which purchase intentions will be more positively affected when companies join them on these causes (Dodd, 2015).

In what concerns the best way to schematise the initiative, and considering what it aims to influence, research shows that social media has a strong influence on purchase decisions: on average, 26% of purchases are stimulated by recommendations on social media (Benson-Armer *et al.*, 2015). Therefore, the use of social media is one of the most effective ways to convey the message of *B&J's*. By urging people to use social media to create buzz on an issue, online activism movements (e.g. Black Lives Matter¹¹) can arise, creating a high impact at a minor cost.

7.2. Insights from Examples of Ben & Jerry's/Benchmark

B&J's has been tackling democracy for a long time now in different countries.

In the US, in 2004, *B&J's* partnered with *Rock the Vote* - the largest non-profit organization whose mission is to drive young people to the polls to vote. Accordingly, in order to

¹¹ An international activist movement, that campaigns against violence and racism towards black people.

incentivise the registration of millennials to vote (an automatic process in Portugal), a Free Cone Day was held. While free scoops were delivered, a team registered over 11 000 voters (Ben & Jerry's Website, 2017). This initiative has been repeated over time, having the last been held this summer during concerts of the Ohana Fest, US (Appendix 14) (Ben & Jerry's Instagram, 2017).

In April 2016, *B&J's* founders paired along with other 300 activists in the “*Democracy Awakening*” protest, at US Capitol, defending voting rights, which got them arrested (May, 2016). In the same year, as a reply to the Supreme Court's decision to invalidate a critical section of the Voting Rights Act of 1965, a marketing campaign named “*Democracy in your Hands*” was developed. This campaign used online videos showing fingers, spoons and ice cream to explain complex political topics as the power of big money and voting rights, and to ultimately encourage people to vote (Wohl, 2016). Additionally, a *B&J's* limited edition was released: “*Empower Mint*” (US Daily Review, 2016). Part of the proceeds from this flavour were used to provide voting rights' protections for minorities and to prevent multinational corporations and American billionaires from secretly buying elections (TYT Politics, 2016).

In London, **UK**, in 2016, an ice cream limited edition called “*Give a Fudge*” was created in order to revert the downfall in electoral registration that happened due to changes in voter registration implemented in December 2015. *B&J's* partnered up with social justice campaigners *Hope Not Hate* to encourage young Londoners to register to vote (Ben & Jerry's Website, 2016). Similarly to the initiatives in the US, *B&J's* stood on the Clapton Park Estate in Hackney, north London, and gave out free ice cream to young people, which in return registered to vote (Jones, 2016).

In 2016, in Tokyo, **Japan**, *B&J's* offered ice cream to encourage young citizens to vote, but with a different strategy: *B&J's* announced on social media that it would give away ice cream, and asked young voters to reveal on *Twitter* or *Facebook* their desired ice cream flavour, as

well as a statement claiming they would vote in the following election. Participants would only receive their ice cream if they showed their social media post on a *B&J's* shop (McQuarrie, 2016).

In regard to other companies' initiatives supporting democracy, the following were found:

- **Starbucks UK**, in 2016, partnered with *Bite The Ballot* - a youth voter movement - and created the "*Democracy Cafes*", where customers under 25 years would come around and debate political issues. These gatherings took place by the time of the EU's referendum on Brexit - as only 51% of young people said they were certain to vote at all (Elgot, 2016) - and they will be repeated this year for the general election (Starbucks EMEA News, n.d.).
- **Facebook UK** is also turning to politics, urging its users to register for the elections by using reminders on top of their timelines (Appendix 15). By doing that, *Facebook* got 100 000 young people to sign up to vote in just one day (Shivali, 2016).
- **Tinder UK** also developed an initiative related to democracy, on which users were asked to take a quiz on the UK's relationship with Europe. Instead of swiping left or right for a date, users were confronted with statements about the UK placement within the EU, and were asked to swipe right if they believed it was true and left if they did not. After a few rounds, a score was given depending on how many statements were correctly categorised, and a link to register to vote was displayed (Shivali, 2016). This was a simple way of giving out information and appealing for a more reflected vote on Brexit referendum.

7.3. Action Plan

Knowing that the level of absenteeism in Portugal is high (47,4% in Municipal elections of 2013, according to PORDATA, 2013) – even though voter registration is an automatic process –, and acknowledging that voter turnout among 18-to-24-year-olds is, on average, 17% lower than for adults aged 25-to-50-years-old (OECD, 2016), there is urgency in taking young voters to the polls. Considering that the development of this project was coincident with the municipal elections in Portugal (October 1st 2017), and knowing that *B&J's* historically supports democracy rights, the first pilot to be implemented was related to voter turnout.

From the reasoning and benchmark processes it was learnt that trading off ice creams for actions that appeal others to vote (*B&J's* Japan) can represent an opportunity, as consumers feel engaged. Also, *B&J's* Portugal does not have their own shops (making it impossible to replicate *Starbucks* UK actions) nor it has influence in the flavours produced in the Netherlands (making it rather unlikely to launch a limited ice cream edition, as in *B&J's* US or UK). As such, the use of social media seems to be the best option to raise awareness to both the topic and the initiative. Additionally, social media is a powerful tool and it easily engages young people (*Facebook* UK and *Tinder* UK).

The main objective of this action plan was to strengthen democratic institutions by encouraging people to vote. As a result, this more participative population can contribute to the election of leaders that promote and contribute to economic prosperity, competitiveness, and progress, thus positively affecting companies. Additionally, it is hoped that this campaign aids in positioning the brand as a socially responsible one, that advocates democracy and voting rights, as well as informed voting.

To reach those objectives, a two-stages solution was proposed: one to take place prior to the elections and other one during the elections' day.

The **first stage**, before the elections, was meant to raise awareness to the importance of voting. Accordingly, a platform was created (Appendix 16), informing its visitors on the relevance of voting and the importance of the local power, showing the evolution of abstention levels over time and giving answers on frequently asked questions about the voting process. To increase the number of visitors (expanding this information) and to drive people to the polls, a contest was created. In this contest, participants were encouraged to share an original picture in their social media that would incentivise their friends to vote, adding on the description a curiosity about the elections and using the hashtags #VouVotar (“*I am going to vote*”) and #BenAndJerrysPt. The prize for this contest was seven *B&J's* ice creams for each of the three winners.

The **second stage**, carried out on the elections' day (October 1st), was depicted so as to reward those who embraced their responsibility and went voting. This campaign, under *B&J's* motto “*Democracy in your Hands*”, was implemented in Lumiar, once this parish has the largest population (INE, 2013). By being present in the polling station, the group incentivised voters, mainly young adults, to participate in the second-round of the contest (Appendix 17). This time, voters were challenged to take a picture with Woody, *B&J's* mascot, (one element of the team was dressed as it) and share it in their social media using the hashtags #JaVotei (“*I have already voted*”) and #BenAndJerrysPt. As in the first contest, the three winners would win seven ice creams each.

Additionally, surveys were conducted during the initiative in order to collect data for this early stage validation:

- 1) Do people know *B&J's*?

2) Do people link *B&J's* to its values and positioning?

3) Being aware of *B&J's* values, would that influence consumers' decision on the following ice cream purchase?

To those who showed willingness to answer the survey, *B&J's* pens and stickers were distributed (Appendix 18).

7.4. Implementation Plan of Pilot Stage

To ensure that a successful outcome would be reached, the following steps were defined as essential:

1st, speak to National Election Commission (“*Comissão Nacional de Eleições*”) to ensure that the campaign to be done on the day of the election is feasible in legal terms;

2nd, choose the municipalities to be present during the elections' day by analysing PORDATA statistics;

3rd, settle the rules of each competition, applying the knowledge of the benchmark process, and deciding on the prizes;

4th, research and create content for the platform;

5th, design the merchandising to be used on the day of the elections, including roll ups and stickers, to ensure a clear and identifiable presence of *B&J's* brand;

5th, ask for approval of the project to Dr. João Faria (*B&J's* Portugal brand manager);

6th, launch the platform on the 15th of September (International Day of Democracy);

7th, share the platform by creating a *Facebook* page named “Vota com Ben and Jerry's” (Vote with *B&J's*), encouraging family and friends to like, share and participate;

8th, create the short survey to be conducted on the 1st of October;

9th, print and collect material to be used on the 1st of October;

10th, announce and contact the winners of the first contest on the 2nd of October;

11th, announce and contact the winners of the second contest on the 8th of October.

7.5. Results and Discussion

In order to evaluate the success of the initiative, the most relevant metrics were defined and measured at four levels: 1) the use of the platform; 2) the engagement in the contest; and 3) the answers of the inquired people on the survey conducted on the elections' day.

1) Use of the platform: The platform¹² received close to **200 visitors**, from 15th September until 4th October. To boost the reach of the platform and the contest, a *Facebook* page¹³ was also created so as to establish a closer contact to people and allow interaction (likes, shares and comments). From its launch (20th September) until 4th October, the “Vote with Ben & Jerry’s” *Facebook* page reached the following statistics:

Table III: Statistics of “Vote with Ben & Jerry’s” Facebook page

Statistic	Explanation (Fontein, 2016)	#
Likes	How many people are choosing to follow the page	116
Reach	How many people, followers or not, saw the posts	737
Page views	How many times the page was visited	315
Actions on page	How many clicks, comments, likes and shares were made	438

¹² <https://joanastrechalves.wixsite.com/benjerrysautarquicas>

¹³ <https://www.facebook.com/VotaComBJ/>

2) Engagement in the contests: The first contest counted with 19 participations, who incentivised their friends to vote (Appendix 19). The publications, shared on *Facebook* and on *Instagram* have reached a total of 1 088 likes.

The second contest had a total of 4 participants (Appendix 20). The publications, shared on *Facebook* and on *Instagram* have reached a total of 85 likes.

3) Answers of the inquired people on the election' day (in Lumiar): In the day of the elections, 100 voters were surveyed, of which 65 were women. In what concerns the age segment, the distribution was the following:

Table IV: Age distribution of respondents on the election' day

Age segment	18-25	26-34	> 34	TOTAL
# Respondents	36	18	46	100

Regarding knowledge about *B&J's*, 87 (out of the 100) respondents claimed to know the brand, while only 26 associated it to a value or specific characteristic. The mentioned values/characteristics (and their respective frequency of mention) were: fair trade (7), sustainability (7), environment (4) and socially responsible (3). The remaining five associate the brand with other factors that are not mission-related (such as belonging to *Unilever*, using regular discounts or having big chunks in their ice creams).

On a second stage, respondents were given a brief explanation about *B&J's* mission and values. After that introduction, it was asked whether that information would influence respondents purchasing decision regarding *B&J's* on a next time, and the answers were rather favourable: 58 declared to be positively affected by that information, 12 have shown uncertainty about its influence on their purchasing decision, and only 30 considered that the information did not change their willingness to buy. From those unwilling to buy despite

B&J's mission and certifications, some justified their statements by declaring that they value more other factors when buying ice cream, such as flavour, quality and price.

Dissecting results by age segments, it is also possible to reach other conclusions:

Table V: Questionnaire results by age segment on the election' day

Age segment	Do you know <i>B&J's</i> ?		Are you aware of <i>B&J's</i> values?		Do <i>B&J's</i> values affect your willingness to buy it?		
	Yes	No	Yes	No	Yes	Maybe	No
18-25	32	4	9	27	14	6	16
26-34	18	0	8	10	14	2	2
> 34	37	9	9	37	30	4	12
TOTAL	87	13	26	74	58	12	30

- *B&J's* is more known within the target age (18-34): 93% of the target claims to know the brand, against 80% of respondents from the non-target;
- From those who know the brand, respondents on the target age (18-34) are more aware of *B&J's* values: 34% of target respondents are aware of *B&J's* values, while this number decreases on the non-target (24%); Nonetheless, the results show that *B&J's* values are still unknown to most, even those that know the brand.
- After being informed about *B&J's* values, the youngest target (18-25) is the one that is less influenced by them (only 39% have stated that it would positively affect their purchasing decision), while the oldest target (26-34) claims to be highly affected by this information (78% are positively affected by the values). 65% of the non-target (>34 years) is influenced by the values acknowledgement. The differences between

groups on buying predisposition so as to reward CSR could also be attributed to the average income of each age segment.

This early stage validation allowed to roughly validate two crucial beliefs: 1) *B&J's* is a recognisable brand, although not due to the communication of its values and mission, which are mostly unknown by respondents; and 2) potential gains may come from customers' understanding of *B&J's* social and environmental mission and its impact, as respondents state to take into consideration that characteristic on the buying decision process.

7.6. Limitations

Despite the positive outcomes of this solution, both in terms of projection on social media and making a first validation of hypothesis, there were limitations that affected the pilot's potential success/relevance:

- ❖ The platform was made using a free website tool, which displayed in the URL link the email of one of the elements of the group. This fact brought some confusion to the users, and also contributed for an unprofessional look of the platform. Additionally, the visitors' counter of the platform was added after the launch of the same, which means that the number of visits accounted is smaller than the real one;
- ❖ The platform's use and engagement in the contests was mainly obtained by personal contacts, since it was rather challenging to spread the platform, which can also bias the results;
- ❖ On the day of the elections, there were people interested and approaching the group but upon realising that they had to publish a picture in one of their social media platforms, they showed some discomfort and refrained from doing so. Additionally, there were more people taking pictures (potential participants) than people that ended

up uploading these pictures, which was attributed to the fact that, even for a good cause, people are “protective” of their social image.

Even so, some of these limitations could be surpassed with higher engagement from *B&J's* Portugal, namely by promoting the platform, publicising the contest on their *Facebook* page (adding legitimacy to it) and investing on *Facebook Ads* as a way to promote the initiative.

All in all, these limitations were considered and taken into account when developing the second initiative so as to ensure its relevance for further analysis and success.

7.7. Budget

For this campaign, two types of materials were produced: stand-up (Appendix 21) and stickers (as mentioned before). The budget allocated to this solution was 50€, used to print the stand-up and to produce 300 stickers. Additionally, 70 *B&J's* pens from previous campaigns were made available for distribution.

7.8. Campaign Tracking for Escalating

The long-term success of an initiative may depend on its ability to grow by scaling up. In this section, recommendations will be given to replicate and scale the initiative.

Scholars say that while social media tools have made activist movements accessible to participants across the country, it is the actions of the activists themselves that create an impact (Lewontin, 2016). In other words, even though the created platform can be useful to raise awareness, it is the action of approaching people in the voting polls that has an actual impact. As such, recommendations will be given in regard to the two stages: raising awareness and action.

Firstly, the platform should be replicated, as it has an educational purpose, by explaining the importance of voting, and it also helps promoting the initiative on the elections' day. To increase the number of views, *B&J's* should share it through its social media channels, but also partner up with institutions related to the cause (e.g. *Círculo Cultura e Democracia* and *Akto*), or even universities, as most students are in the age target.

Secondly, in order to increase consumers' reach, the recommendation for scaling up is to spread the initiative to Lisbon and Vila Nova de Gaia, as these are the two Municipalities (from the centre and north of country, respectively) with more electors (PORDATA, 2017). After analysing the number of voting polls in each city, it is advised that *B&J's* should go to half of them, by using as criteria the number of voters and to ensure that a reasonable amount of voters is reached.

To create a higher buzz and engage more voters, it is recommended that a reproduction of Free Cone Day should be carried out. Therefore, in each voting poll, three people should be allocated (two distributing ice creams and one dressed like Woody to increase the interest of the voters). These people could be recruited through a “*Unilever* students' ambassador program”, where students could apply to be at the polling stations voluntarily, incentivising millennials to vote.

Additionally, more branded material should be produced in order to ensure 1) that the brand is present; 2) that consumers are put in contact with it, and with its values and practices; and, more importantly, 3) that *B&J's* is recognised as socially responsible corporation for being the organiser of the initiative.

8. Environmental Pilot - Beach Cleaning

8.1. Reasoning

When designing the environmental pilot, three factors were taken into consideration: 1) the issue to be addressed (defined to be sea pollution); 2) the relevance of the topic for millennials; and 3) the most appropriate channel to communicate the initiative (through social media).

In order to better define the type of environmental issue to tackle, and taking into consideration that not all are susceptible of intervention, the answers of the comprehensive survey were taken into consideration. As the third most mentioned problem was the pollution of seas/beaches/oceans, this pilot was set to raise awareness on the issue. In fact, as mentioned in previous chapters, Mohr *et al.* (2001) proposed that the beliefs about CSR and consumer behaviour will be stronger the more important consumers judge these issues to be.

Recent studies show that ocean and sea life have been affected by different factors, being the biggest threat the pollution by plastic debris¹⁴, which is caused by humans (Derraik, 2002). It was estimated that about 10 million tons of plastic are dumped into the oceans every year (Agência Europeia do Ambiente, 2017). This leads to ingestion of plastics and entanglement of marine fauna, and concentration and transport of toxic chemicals by the water (Law *et al.*, 2010).

Accordingly, more than 90% of pollutants in the Portuguese beaches are composed of microplastic waste¹⁵ (Lusa, 2016). Considering the long life of plastics and their impact in marine ecosystems, it is imperative that severe measures are taken to address the problem at both national and international levels (Derraik, 2002).

¹⁴ Any plastic materials released in the sea/ocean/lake/waterway.

¹⁵ The result of plastic fragmentation while in the water, which turns it into particles of very small dimensions and of difficult removal.

In fact, many are the industries which rely on plastic to deliver their products; likewise, in the food and beverage industry, plastic packaging is heavily used with the argument that it ensures the delivery of a safe food supply (Plastic Packaging Facts Website, 2017). Therefore, in order to truly diminish pollution by plastic, it is paramount to reduce plastic production and usage in all industries.

Additionally, the topic is especially relevant for *B&J's*, considering that their target is very likely to engage with environmental-related issues. According to AMP Agency (2010), 61% of Millennials worry “*about the state of the world and feel personally responsible to make a difference*”, which consequently motivates this target group to engage in activities that create positive change.

A study carried out by Kanter & Fine (2010) tried to evaluate the influence of using social media to “*increase interest in environmental measures with the final aim of better communicating sustainability issues*”. The study showed that the use of social networks can actively foster environmental awareness and a sustainable lifestyle.

Thus, the use of social platforms can work as a facilitator when promoting a pilot related with environmental issues. In addition, as previously mentioned, *B&J's* target is highly active in social networking platforms.

8.2. Insights from Examples of Ben & Jerry's/Benchmark

B&J's has a long relationship with environmental causes, and it has been involved in several initiatives focused on climate change, under the motto “*Just like ice cream, if it's melted, it's ruined*” (Ben and Jerry's Website, 2017).

Furthermore, *B&J's* packages do not contain plastic in their composition, as the company has committed to only use paperboard that has been certified by *FSC*. Moreover, as mentioned

before, *B&J's* has compromised to follow developments in safe packaging using renewable materials, towards the development of biodegradable and compostable packaging by 2025 (Ben & Jerry's Website, 2017).

Apart from the sustainable packaging, *B&J's* has been engaging in specific initiatives. In the US, the level of pollution of Lake Champlain, in Vermont, came to *B&J's* attention. In order to spread awareness, and getting more people involved, *B&J's* teamed up with Phish (a group of Vermont locals), and released "*Phish Food*" ice cream flavour in 1997. A portion from every sale of Phish Food goes to *WaterWheel*, that uses that money towards cleaning up Lake Champlain. *B&J's* also co-hosted the world's largest cowbell ensemble and sold limited edition t-shirts, in order to find ways to help this foundation to clean Lake Champlain (Ben & Jerry's Website, 2017).

However, this was not the only campaign related to ocean/sea/river pollution undertaken by *B&J's*. In 2014, *B&J's Australia* supported *WWF* campaign to save the Great Barrier Reef, with a campaign on its website and by introducing the flavour Phish food to draw attention to the potential damage of the reef and the consequences of the latter. Additionally, *B&J's* started a road trip to give free ice cream while bringing awareness to the issue among the local population (The Guardian, 2014).

In order to justify the pertinence of the subject, other companies' initiatives supporting the prevention of water pollution were examined:

- *Procter & Gamble*, in 2017, partnered up with *TerraCycle* and *SEWZ*, and *Head & Shoulders* (one of its brands) launched the world's first shampoo bottle made of 25% recycled beach plastic. The product's intent was to raise awareness to the problematic of ocean plastic and what can be done to prevent plastic waste. Additionally, the brand

is working towards having 25% recycled plastic in all of its bottles distributed in Europe by 2018 (Head & Shoulders Website, 2017).

- *Surfdome*, in 2014, supported a campaign for ocean sustainability and launched their own project called *#2MinuteBeachClean* with the writer and television presenter, Martin Dorey. This project consisted in challenging visitors to remove as much plastic possible when going to the beach. Later, *Surfdome* founded “*The Plastic Project*” which was an initiative to send explorers and documentarians to the most remote coasts of the world so as to document and further explore the topic of plastic pollution and its effects, while emphasising the importance of human intervention (Boat International, 2017).
- *Davidoff* partnered up with *National Geographic* to launch *The Ocean campaign*, which encouraged consumers to engage in the following initiatives: beaches’ cleaning, going “plastic-free”, supporting a tax for plastic bags and eating only Marine Stewardship Council certified fish¹⁶. In addition, *Davidoff* has released a sea-inspired fragrance - *Cool Water* -, from which part of the sales revert to *National Geographic*’s Sea Mission (Boat International, 2017).
- *Vestas*, in 2017, organised an initiative called “*Limpeza de Praia powered by Vestas*” in praia do Castelo do Queijo, in **Portugal**, in order to clean marine pollution that accumulates in the coastal area (Sea life, 2017).
- *Mercedes-Benz Portugal* in 2016 partnered up with *EvoBus*, *Centro de Educação para o Cidadão com Deficiência*, *Associação Empresarial of Sintra* and Sintra’s City Hall, and organised an initiative to clean the beach Praia Grande. This event gathered 100 participants and collected 30 bags of trash (Meo’ Beachcam, 2016).

¹⁶ This international non-profit organisation recognises and certifies sustainable fishing practices.

- In 2016, in **Portugal**, *Aicep Global Parques* sponsored an initiative of beach cleaning in Praia da Ilha do Pessegueiro and Praia Grande de Porto Covo. After the collection of waste, a workshop to transform the waste into art was held. This initiative was promoted by the Sines' City Hall, and supported by *Associação Portuguesa do Lixo Marinho* and the local maritime authority (Aicep Global Parque, 2016).

These initiatives show that some companies are not only aware of the pollution of seas and its effects, but are also reacting to the problematic by developing initiatives and/or incorporating solutions in their core business. However, considering the specific case of *B&J's* Portugal and its inability to adapt production methods to face the problem, the way to tackle it had to be purely by diminishing the impact of sea pollution, such as *Vestas*, *Mercedes-Benz Portugal* and *Aicep Global Parques* did.

8.3. Action Plan

The relevance and urgency to tackle the problem of marine pollution led to the development of the second pilot. Considering the previous section, it was defined that this pilot should be the cleaning of a Portuguese beach. Helping in reducing the evidence of oceans' pollution with the contribute and engagement of volunteers should enable *B&J's* to inform consumers about the impact that pollution has on the oceans. Furthermore, this initiative should help in alerting participants that their purchasing decisions can impact the way companies do business, which will influence pollution levels. This can be done either by rewarding companies that use sustainable packaging or by "punishing" those that use plastic packages.

To surpass the lack of knowledge on ocean pollution, Dr. Miguel Lacerda, founder of the *Sea Guardians* community, was asked for assistance in choosing the beach to be intervened (that turned to be Praia de Algés).

Considering that the use of social media to raise awareness to environmental issues revealed to be effective (Kanter & Fine, 2010) and with the goal of obtaining volunteers, a *Facebook* event - “*Agarra o lixo, Liberta o Mar*” (“Grab the Waste, Free the Sea”) - was created so as to enable the implementation of pilot 2 (Appendix 22). All the communication was made without mentioning *B&J’s*, to ensure unbiased results. In addition, contacts with Nova SBE students’ union and an environmental students group named “Green Nova” were established, so that these groups could help in sharing the event. Also, a short speech was given to students in the beginning of a few selected classes at Nova SBE, in an attempt to gather volunteers within *B&J’s* target age.

In addition to raising awareness to the issue, the goal of this pilot was to understand if consumers would **positively alter their perceptions of the brand and purchasing intentions** when involved in an initiative promoted by *B&J’s*, being consequently exposed to the brand’s mission.

In order to measure changes on brand perception and intentions to buy, a **before and after quasi-experimental strategy** was followed. This means that two questionnaires were applied, before and after the initiative:

Before the initiative, people interested in participating were asked to fill out a participation form (Appendix 23). This was meant to gather data on personal information of the participants as well as on what consumers think about the importance of companies having an active role in society. Participants were also enquired on whether they knew any company that develops initiatives which positively affect the society. In addition, the surveyed were asked how companies’ values and mission affect their purchasing decision.

On the initiative day (Appendix 24), to ensure that *B&J's* had a notable presence, t-shirts were handed out to participants. So as to guarantee that no one would feel misled, participants were informed about the brand's presence the day before.

Additionally, two guests were invited to open the event. In the one hand, Dr. João Faria was challenged to speak on *B&J's* behalf, providing a brief explanation of the brand's social and environmental purpose. On the other hand, Dr. Miguel Lacerda was encouraged to briefly talk about ocean pollution, its impact, and how consumers have the power to make change happen.

After the participants' experience and contact with the brand, data collection was carried out. Therefore, the survey developed for this phase (Appendix 25) was a tool to understand if, after being exposed to the brand's values, consumers assimilate this information, and if it will then impact their decision at the time of purchase.

Concluding, this process should allow to **assess if initiatives of social/environmental nature have an impact on consumers' purchasing behaviour.**

8.4. Implementation Plan of Pilot Stage

To ensure a successful outcome, the following steps were defined:

1st, learn more about the topic and conduct research on how water pollution impacts in Portugal by applying the knowledge of the benchmark process. This allowed to decide on the type of initiative to be developed;

2nd, send an email to *B&J's* Portugal brand manager, Dr. João Faria, with the briefing of the initiative, asking for the approval of the project;

3rd, contact Dr. Miguel Lacerda to: 1) obtain further insights on the topic and other aspects to be taken into consideration (especially on which beaches there is a need of intervention); and

2) invite him to be present on the initiative day in order to raise awareness on what are the main impacts of water pollution and what can be done to prevent this issue;

4th, contact university/students' groups, clubs and associations, and university *Facebook* groups so they could share the event;

5th, define and design the initiative in order to understand if there is a modification on the consumers' purchasing decision as well as on their perception of the brand when participants are exposed to the social and environmental values of *B&J's*;

6th, meet with Professor Luis Martinez¹⁷ from Nova School of Business and Economics, to evaluate if the pilot was designed in the proper way to assess the research question;

7th, design and order the merchandising to be used on the day of the initiative, namely t-shirts, to ensure a clear and identifiable presence of *B&J's* brand;

8th, create a participation form to be filled in the moment of enrolment and a short survey to be conducted at the end of the initiative;

9th, create the *Facebook* event and research on content to publish, in order to engage the audience;

10th, launch the event at least one week prior to the initiative, encouraging family and friends to like, share and participate;

11th, engage students from Projects with Impact class from Nova School of Business and Economics to participate in the initiative;

12th, obtain information about the tides and atmospheric conditions in order to choose the beach location and meeting point;

¹⁷ Professor of Marketing and researcher, with a Ph.D. in Social and Behavioural Sciences.

13th, contact volunteers to update them on information regarding: beach location, meeting point, and material needed;

14th, buy the material needed (garbage bags and gloves);

15th, conduct the final survey during the initiative day.

8.5. Results and Discussion

This pilot's most relevant metrics were: 1) engagement in the *Facebook* event; 2) number and analysis of registration answers (before the initiative); and 3) analysis of the answers of the second survey (conducted during the initiative).

1) Engagement on *Facebook*: The “*Agarra o lixo, Liberta o Mar*” (“Grab the Waste, Free the Sea”) event was launched on the 18th November. From the moment that was made public until the day of the pilot (26th November), it was shared 400 times, and there were 1060 people that clicked on the “Interested” button. To increase the engagement with the initiative, daily posts were made with statistics about ocean pollution (Appendix 26).

2) Registration survey: The registration survey was filled in by 99 people, but only 96 fully completed the survey and were considered. From that total, 35% belonged to *B&J's* age target (Appendix 27). From the total number of respondents, 10,4% belong to a social/environmental group and the same percentage was able to identify companies that support social/environmental causes. Interestingly, *B&J's* was not mentioned in the previous question. In order to verify the level of agreement with statements, respondents were asked to use a scale, from 1 (Not important/Not affected at all) to 5 (Crucial/Extremely affected):

Table VI: Statistics of respondents' level of agreement on the registration survey

	How important is it that brands have an active role in society?	How affected is your buying decision by the values and initiatives of a brand?
	Average answer	Average answer
NON-TARGET	4,548	3,484
TARGET	4,823	3,823
TOTAL	4,646	3,604

It is possible to verify that most respondents believe that is important that brands have an active role in society, while fewer respondents take that information in consideration on the buying decision. Interestingly, in both questions, the target shows a higher level of agreement with the statements.

3) Pilot day's survey: On the event day, around 50 people joined the initiative. From the 43 that have agreed to reply to this second survey, 17 (39,5%) belonged to the age target (Appendix 28). When asked about *B&J's*, 32,6% of the respondents claim to buy it, 39,5% are aware of the use of fair trade ingredients, 25,6% know that *B&J's* is a B-corporation and 44,2% acknowledge that *B&J's* supports social and environmental initiatives.

Applying the same method of the previous survey (using scales), the following results were obtained:

Table VII: Statistics of respondents' agreement on the day of the environmental pilot

	My perception of <i>B&J's</i> has improved *	When buying ice creams, I will opt for <i>B&J's</i> *
	Average answer	Average answer
NON-TARGET	4,577	4,038
TARGET	3,765	3,236
TOTAL	4,256	3,721

* Scale: 1-Totally disagree, 2-Disagree, 3-Not agree nor disagree, 4-Agree, 5-Totally agree

The perception of *B&J's* clearly improved for most respondents, **meaning that with a higher level of understanding and awareness of the brand's corporate social responsibility efforts, there is an improvement in consumers' image of *B&J's*.**

When analysing purchase intentions, results are consistent with Mohr *et al.* (2001) argument about the inconsistency between consumers' beliefs about CSR and their behaviours, as **not all consumers claiming to be concerned about CSR were purchasing goods based on it**, as the average reply for this question was 3,721 (out of 5).

Looking to the differences between the target and the non-target, it is possible to conclude that the non-target reacts more positively both on perception and purchasing intentions.

In the future, there is the challenge of understanding why these potentially interested consumers have not been able or willing to actually express their preferences in real purchasing activities. Depending on the findings of such future research, *B&J's* strategy may require the creation of initiatives that activate a change of consumer habits.

8.6. Limitations

The location of the initiative depended on the amount of waste present at the beach. In fact, this led to the alteration of the location of the event, from Cascais to Algés, which may have had a negative influence in the participation of volunteers. This communication was made only two days prior to the event, and only around 50 of the 99 enrolled appeared.

Another limitation was that it was only possible to communicate the initiative close to the date of the event (with only one week of advance) and that may have limited its level of reach.

Additionally, in regard to the surveys, it was difficult to establish a trustworthy enough comparison between the first enrolled participants and the ones that actually participated, since the sample was not the same. This makes any comparison between the first and the second survey inconclusive.

Moreover, when the sample is small, statistical evidence is not as credible. Also, it is not representative of the population.

Lastly, some participants made recommendations concerning the number of brand representatives in the event. The fact that participants believed that there were not enough *B&J's* representatives present may be a signal of the impression of a lack of commitment on *B&J's* behalf.

8.7. Budget

For this campaign, the only branded materials produced were 50 t-shirts: 250€ (Appendix 29).

Additionally, 2€ were spent in gloves and bags to handle the collected waste.

8.8. Campaign Tracking for Escalating

In order to make escalation possible, it is crucial to have a broader communication of the event. This can be done by using the brand's social platforms and by establishing partnerships with institutions that can relate to the cause and increase its reach, such as *Oceanário de Lisboa*, *Banco Voluntariado de Lisboa* and *Gulbenkian*.

As it is especially beneficial for the brand to have its target participating in the initiatives developed, *B&J's* could directly address university students.

A broader reach should lead to the increase of volunteers. This, in turn, enables the possibility to act in more beaches and perhaps, with higher frequency.

Finally, in order to truly make the brand's presence recognisable, not only t-shirts should be printed, as *B&J's* should distribute ice cream at the end of the initiative to ensure that participants are not only put in contact with its values and mission, but also with its products.

9. Additional Pilot Idea - The Impact of Forest Wildfires

There were more pilot ideas, that due to budget and time constraints were not implemented.

As such, this chapter will present one of them, so that *B&J's* can implement it later on.

9.1. Reasoning

Wildfires impacts the environment by being a source of greenhouse gases, releasing black carbon emissions and, also, increasing the combustible materials on soils (Larkin *et al.*, 2014). Furthermore, they have many negative economic implications (Brunson & Tanaka, 2011).

This year, in Portugal alone, the burnt area amounted to a total of 418.087 hectares (ICNF, 2017). According with the Wildfire provisory report of 2017, these fires led to several social

damages, in terms of lost lives, number of injured people, destruction of private property and deterioration of the lifestyle of the affected. Therefore, it is urgent to tackle the problem so as to aid in preventing fires and help in the recovery of burnt areas and population affected.

Considering the importance of the subject and bearing in mind that it is a dear one to *B&J's* target consumer (ranked 4th within the target age in the comprehensive survey) it seems that the fires in Portugal are a theme with which the brand could bring current and potential consumers to engage.

Accordingly, two pilot ideas were designed: 1) recovery of the areas devastated by the fires either by cleaning or planting; and 2) supporting and rewarding the firemen that put their life at risk.

9.2. Insights from Examples of Ben & Jerry's/Benchmark

The only initiative developed by *B&J's* on the topic of fires or aiding the firemen was the following:

In US, in 2004, *B&J's* collaborated with *Canton Volunteer Fire & EMS* department in order to fundraise the respective department. *B&J's* franchise in Canton offered free ice creams that aimed to sensitise the local population to donate money for the fire department for equipment and training. The team registered over 2500\$ and 5000 cone of ice cream were given away (Town of Canton Volunteer Fire & EMS Website, 2014).

When looking for other companies' initiatives supporting the fire department, the following were found in Portugal:

- *Eugster & Frismag*, partnered with Fire department from Torres Vedras in order to produce and sell calendars of 2017 with photos of the firemen. This campaign was

able to raise 1 700€ (Associação Bombeiros Voluntários Torres Vedras Website, 2017).

- *Continente*, in 2017, also developed an initiative related with supporting fire departments which consisted in organising concerted of Tony Carreira, godfather of Missão Continente, to fundraise money to Liga dos Bombeiros Portugueses. This tour was a social campaign called “*Tour of Smiles*” with the aim to support ten institutions in ten locations where the artist performed. Additionally, in order to compensate the effort made by the firemen, Continente opened their doors to offer basic goods that were needed by the firemen (Missão Continente Website, 2016).
- *CTT* and *Alves Bandeira* developed a campaign, “*Heróis sem Capa*”, in order to sensitise and create awareness among the population that is essential to help firemen during the whole year and not only in the wildfire period. This campaign consists in selling magnets, from which the total revenues were donated to Liga dos Bombeiros Portugueses (CTT Website, 2017).

All in all, initiatives involving firemen seem to represent an opportunity of intervention for *B&J*'s and a plausible way of showing its commitment with the communities where it operates.

10. Additional Recommendations

B&J's needs to become socially active by developing and implementing new initiatives, taking into account the causes its consumers feel more connected with, in order to increase the chances of originating involvement and participation. To do this, the company should take into consideration, and continuously update, the **market research** undertaken on the problematics that consumers worry about. As such, future initiatives should tackle one or

more of the following: global warming/climate change, water scarcity, and pollution of the seas/beaches/oceans (survey' results).

In the comprehensive questionnaire, 45 people affirmed they would like to be more involved in *B&J's* social and/or environmental causes and left their email. Therefore, in each initiative developed by *B&J's*, the emails of those interested in participating in future events should be collected. This could also result in a useful **database** that could provide essential insights on current consumers' characteristics.

However, it is relevant to mention that *B&J's* needs to make sure the supported causes have a natural connection to its core mission and values, so as to **avoid to be considered as inauthentic or to be practicing social- or green-washing**.

Also, even though the focus should be the involvement of consumers, strong and credible **partnerships** with the public or private sector organizations or with relevant non-profits can be helpful in different phases of the initiatives, mainly if technical expertise needs to be sought.

Moreover, for CSR initiatives to become core to *B&J's* Portugal, **more involvement from senior management** is necessary. As stated by some scholars, it is paramount that senior leaders express their commitment to the initiatives developed so as to ensure that these are successfully incorporated into the company's culture (e.g. Heslin & Ochoa, 2008; Chatterji & Toffel, 2016).

Finally, there should be a **continuous commitment to CSR initiatives** so that these are not perceived as inauthentic. To do so, planning is key, and so is choosing causes that can be supported continuously, over the long-term.

Throughout the development of this work project, some demands/market trends which are not being met by *B&J's* current product offer were encountered. Accordingly, the following section consists of recommendations outside the scope of this work project.

Moreover, according to the Portuguese *B&J's Facebook* page, consumers are aware of the existence of vegan options in other markets and there are several comments requesting this product in Portugal. Thus, it would be beneficial for the brand to include the vegan, non-dairy ice cream options, which exist in other markets. (Appendix 30) (Ben & Jerry's Facebook, 2017).

Furthermore, considering that *B&J's* current packaging only has a small fair trade logo, the packages should be modified (*e.g.* by adding a sticker) and used to communicate the brand's social mission.

In addition, point of sale (POS) material with relevant information on *B&J's* way of doing business (caring dairy, brownies' sourcing, cage free eggs and overall production methods) should be developed.

Lastly, *B&J's* should alter its marketing strategy by including its social and environmental concerns in the way it conducts production and the overall business (*e.g.* in the *FOX* advertisements).

11. Conclusion

B&J's has a social and environmental mission that has the potential to generate differentiation, brand loyalty, and willingness to pay a premium price. In fact, evidence suggests that markets where *B&J's* is most active in pursuing impactful social or environmental initiatives (US, UK and the Netherlands, among others), through the engagement of consumers, it achieves a superior performance in terms of market share.

Notwithstanding, *B&J's* Portugal does not have a clear nor differentiated positioning in the Portuguese market, since little has been done to activate its mission. Accordingly, the brand has a weak market penetration (both in terms of market share and on consumers' knowledge of *B&J's* values). Therefore, in Portugal, there seems to be a window of opportunity to capitalise on this differentiation factor, since *B&J's* is not recognised by its values.

Thus, the aim of this work project was to find a joint value creation model for *B&J's* as the brand has potential to leverage such strategy. This can be achieved by capitalising on its differential factors - CSR and values - and by involving its consumers in social and environmental initiatives. By doing so, *B&J's* would not only create value for the brand (by increasing its reputation and loyalty, ultimately leading to a boost in sales), but also for its consumers, as they would be empowered to create value for the society.

To validate whether consumers change their perception and intention to buy *B&J's* once they engage in social/environmental activities, a corporate societal marketing strategy was put in place, with the following: 1) comprehensive survey, 2) citizenship engagement pilot on voting in local elections, and 3) environmental pilot on beach cleaning and raising awareness to microplastics.

Empirical data suggests that consumers' knowledge of *B&J's* CSR practices positively affects brand consumption, as well as the perception of brand's quality, loyalty and reputation. Additionally, the belief that Portuguese consumers were not aware of *B&J's* values was confirmed. Moreover, most respondents claim to have improved their perception of the brand, as well as a higher intention to buy *B&J's* after participating in the pilots. Accordingly, it is possible to verify that the joint value creation model has potential to be put in practice. The potential profit increase should enable the company to keep positively impacting the society, allowing the continuity of the joint value creation.

Concluding, there is a clear margin of improvement for *B&J's* to clarify its values and CSR strategy among consumers. When added to the brand's strategy, the suggested model may contribute for the creation of a blue ocean opportunity, incentivizing other companies to follow the same approach.

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