

COMMUNICATION PLAN OF SONAE SIERRA'S GIFT CARD
SURPRISE

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“I may not be there yet, but I’m closer than I was yesterday”

(Unknown)

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ABSTRACT

The purpose of this master's thesis was the development of a Communication Plan for the Surprise Gift Card, a product that will soon be launched by the Sonae Sierra Company.

After a thorough evaluation of the financial trends of the Gift Vouchers sales (B2B and B2C), the company found that it was necessary to replace the current voucher for the card format and, at this moment, it is in development the future Surprise Gift Card (B2C model).

With respect to the product Surprise, it is facing a problem of seasonality and its degree of notoriety in the market is very low compared with other competitors.

Given this situation, this present communication plan will have two main objectives: to enhance brand awareness and increase purchase intention of the brand in the target audience.

To support the plan it was necessary to conduct a profound analysis of the external and internal environment to the product Surprise, using primary and secondary data, which allowed reaching a set of insights and conclusions.

Therefore, the Surprise Gift Card communication plan drawn up for one year, consisted of a large range of promotional activities and brand activations, as well as, in combining different communication tools in order to create an integrated and effective plan, taking into account the proposed goals.

Key-Words: Gift Card, Communication, Communication Plan, Shopping Centers.

JEL: M30, M31, M37, M39

RESUMO

O propósito desta tese de mestrado consistiu no desenvolvimento de um Plano de Comunicação para o Cartão Presente *Surprise*, um produto que brevemente será lançado pela empresa Sonae Sierra.

Na sequência de uma profunda análise das vendas do negócio dos Cheques-Prenda (B2B e B2C), a empresa considerou necessário proceder à substituição do atual cheque-prenda para o formato cartão e, neste momento encontra-se em desenvolvimento o futuro Cartão Presente *Surprise* (modelo B2C).

No que diz respeito ao produto *Surprise*, o mesmo depara-se com um problema de sazonalidade, além de que o seu grau notoriedade no mercado é muito baixo, comparativamente com outros concorrentes.

Perante esta situação, o presente plano de comunicação terá dois principais objetivos: aumentar o reconhecimento da marca e aumentar a intenção de compra da marca por parte da audiência alvo.

Para suportar o plano foi necessário proceder a uma profunda análise do ambiente externo e interno ao produto *Surprise*, utilizando dados primários e secundários, que permitiram chegar a um conjunto de perceções (*insights*) e conclusões.

Deste modo, o plano de comunicação elaborado para o Cartão Presente *Surprise* durante um ano, consistiu numa diversificação de ações promocionais e ativações de marca, bem como na combinação das diferentes ferramentas de comunicação de forma a criar um plano integrado e eficaz, tendo em conta os objetivos propostos.

Palavras-Chave: Cartão Presente, Comunicação, Plano de Comunicação, Centros Comerciais

JEL: M30, M31, M37, M39

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EXECUTIVE SUMMARY

The present master's thesis pretends to be the answer to an idea that emerged during an internship done in the Mall Activation Department in 2011/2012, in the sub-holding Sonae Sierra. Sonae Sierra, specialist in creating unique shopping experiences, is a Portuguese multinational enterprise founded in 1989, being nowadays, the major reference in the retail sector worldwide. In Portugal, it is responsible for the management of a robust shopping centers' portfolio coverage of Portugal from north to south and islands.

The Gift Voucher Business is segmented by two models, the B2B and the B2C model, representing respectively the Prize and the Surprise Gift Vouchers, umbrella brands of Sonae Sierra. After having accomplished the sales analysis of the last years (2007-2011), to both business models, the company realized that both were facing a seasonality problem, but the Surprise product situation was much more worrying. Therefore, Sonae Sierra was aware that something would have to be done and decided that the voucher format needed to be replaced by the card format.

Additionally, the notoriety degree of Surprise Gift Voucher (SGV) is very low, which may be one of the reasons to have a low sales performance.

Thus, this master thesis consists in the challenge of a proposal for the development of a communication plan to the Surprise Gift Card (SGC), with two main objectives: increase brand purchase intention and Surprise brand awareness.

The present thesis was organized in seven chapters. First of all, the problem context's definition was presented, **(Chapter 1)** followed by the literature review **(Chapter 2)**, in which a set of theories, concepts and arguments were studied, regarding three main issues: Marketing Communications, Shopping Centers and Gift Cards. The Methodology **(Chapter 3)** used to gather information was based on primary and secondary data. The primary data was collected from three different departments of Sonae Sierra, in which the Market Intelligence Department, gave the major contribution to the project, providing a qualitative and a quantitative market research, due to the fact there isn't any market information about the gift card sector in Portugal. The secondary data was collected from reliable sources such as reports, journals, reviews, institutions, internet and a yearbook.

A deep external and internal analysis of the SGV was done **(Chapter 4)**. The PEST analysis acknowledges that, a new legislation is being prepared concerning the gift card business and,

if approved, will have a negative impact over the sales. Concerning the macro-economic context, Portugal nowadays is facing one of the biggest financial and economic crisis, which is leading to the decrease of the families' available income and, consequently, to the reduction of their purchase power. However, the technological growth rhythm is being exponential and it constitutes a market opportunity to the companies.

The retail sector is being affected by the consumers' retraction, regarding the sales low results and it must be adjusted in accordance with the new Portuguese consumption patterns. The Portuguese's habits and lifestyles has changed and some of the consumer behavior trends predictable are the frugality, the value of time saving, regarding the products' consumption; the value of a transparency communication and with a huge impact, the society discount, where the "Bargain Hunters", the good business hunters, are able to convince the consumer, that there will be always, a timeframe where he will buy the product cheaper than the initial price.

The actual SGV has strong and dynamic competitors in the market. All of them already have the card format which represents a weakness to the actual SGV.

From the customer perspective, the gifts card/voucher market is inserted in the useful generic category and is seen as an easy, embracing, convenient, flexible, economic practical and quick solution but, also a last resort and a very impersonal option.

The company and the Gift Voucher's business were analyzed, specifically the SGV, concerning its features, sales trend, consumers, notoriety degree and communication strategies. The massive communication, through the advertising tool is always done inside the shopping centers because, the priority it's to reach the shopping centers' clients. Concerning brand activations, the SGV is very poor, and the SGV website isn't very interactive. There isn't a customer's data base, a problem that will be overcome by the SGC through the newsletter channel.

The conclusion of the whole chapter was done through a SWOT matrix of the SGV.

The proposed communication plan (**Chapter 5**), starts with the presentation of the predictable SGC, image and its features. After being developed, it can be changed until its launch.

Altogether, there were developed nine communications designs, mainly in special days, to remember the target audience that the SGC is a gift option. Starting with the launching of

SGC and followed by a mix of sales promotion activities, brand activations and one social responsibility action, the communication plan pretends to have a transversal presence throughout the year. The budget allocated to this communication plan will be 200.000,00€.

Then, it was selected the channels aiming to obtain the maximum impact in the communication designs' results. All the methods of communication were combined and had a key role in the communication plan, being the Advertising and the Interactive Marketing tools the ones that are common to all communication designs. To measure its feedback there were took in hand a set of actions.

The timeline to all communication designs was accomplished (**Chapter 6**), followed by the conclusions and expected results (**Chapter 7**), to the communication plan.

Trough the integration of the marketing communication, it is intended to reach the communication plan's objectives. The Sales Promotion and the Events and Experiences will be the strategic tools mainly used in the communication designs. It will also be made use of the Public Relation and Publicity tool, to the accomplishment of a social solidarity responsibility event. The indoor communication, inside the shopping centers, will be mostly carried out by the Advertising tool using different channels. The Personal Selling will have a key role in the creation of the database. In the online environment, the Direct Marketing and the Interactive Marketing tool will reach the target audience, trough the newsletter and the website channel. From the most communication designs will be estimated to generate a positive WOM.

1. PROBLEM CONTEXT'S DEFINITION

The business world is facing many challenges. The costumers are nowadays increasingly demanding and companies are facing a competitive environment, a current deep economic and financial crisis and major technological changes. These are some of the factors, which contribute to the transformation of the companies that need to keep looking for constant solutions to earn competitive advantage. The retail sector, specifically the shopping centers business, is clearly one of the most affected by the consumption's retraction, because the pace of growth decreased when compared with previous years.

The core business of Sonae Sierra is the tenant occupancy, but there is a secondary business area that generates direct incomes to the company, the Mall Activation, which makes part of the Temporary Letting Spaces and the Gift Vouchers' Business.

After a deep sales' analysis of the last years (2007-2011) to the Prize and Surprise Gift Voucher, the financial trends shown, that the business presented a growth rate but, in a closer future tend to stagnate. From that analysis was also detected that both products presented a seasonality problem, in Christmas season, once in December the sales are in over 50% higher than the volume of annual sales, that involves a high business risk. However, this situation is of more concern with the SGV.

A quantitative marketing research was done to find out the notoriety degree of the SGV, and the result was of only 22%. That was a big discrepancy when compared with the result of its major competitor (54%).

Facing with this problem, Sonae Sierra have considered an upgrade regarding the product features and, realized that the actual voucher must be replaced by a card.

Thus, the purpose of this communication plan to the SGC has two main goals: increase the Surprise brand awareness and increase the brand purchase intention, throughout the year, overcoming the problem of seasonality. The bottom line of the communication designs will be the SGC's launching, followed by a set of sales promotion and brand activations aiming to achieve the defined objectives, as well as, in the combination of different communication channels to create an efficient and effective communication plan.

2. LITERATURE REVIEW

2.1. Marketing Communications

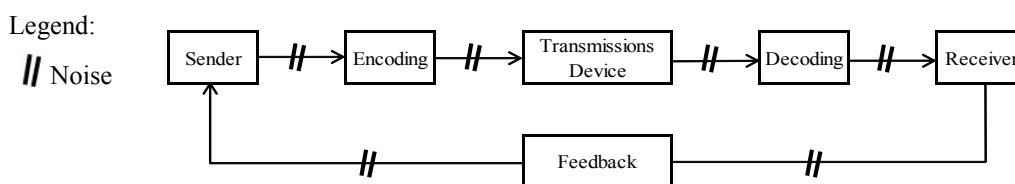
2.1.1. Definition, Process and Effectiveness

It's not enough to make a good product, it's also necessary to communicate it (Lindon *et al.*, 2004). The classic definition of communication is based on “*who (source or sender), says what (message), in which channel (medium), to whom (audience or receiver), with what effect*” (Lasswell, 1948 quoted by Danaher *et al.*, 2011:9). A simpler definition provided by Edson Athayde (cited by Carvalho, 2006:265) mentioned that “*communicate is the act of informing someone of something*” and to inform is nothing more than to pass a message. The message can be something abstract, provided it is relevant to the target.

Kotler (2009:510) defined Marketing Communications as “*the means by which firms attempt to inform, persuade and remind customers (directly or indirectly) about the products and brands they sell*”. They allow companies to relate their brands to other people, places, events, experiences, feelings and also contribute to the brand equity, as well as drive sales.

The marketing communication process is included in any advertising or marketing program. The companies hire advertising agencies or use an “in-house” marketing group for their communication process. It's composed by six stages (Fig. 1): the sender (companies), who encodes the message (“*a creative takes the idea and transforms it into attention-getting advertisement designated for various media*”), and then the message is delivered to the receivers (audiences) through various transmission devices (channels). The decoding of the message occurs when the message achieve the receiver's senses (one or more). The last, but not least, stage is the feedback and it reveals that the message reached the receiver and he is responding. It can take many forms: purchases, inquiries, complaints, visits to the stores, blogs and websites hits (Clow *et al.*, 2010:30).

Figure 1 – Communication Process



Source: Clow *et al.* (2010)

Popescu (2002) cited by Kailani (2012) asserted that the communication effectiveness occurs when the message is perceived and achieves the reaction intended by the receiver, in response to the message. In line with Popescu (2002), the Shannon and Weaver's model of effective communication (1949) quoted by Danaher *et al.* (2011:9) refers that the message will be most effective "when the sender's encoding of the message corresponds with the receiver's decoding of it". Thus, according to Clow *et al.* (2010), when the receivers decode or understand the right message as it was expected by the sender, it takes place the quality marketing communications.

However, sometimes there is an impediment which doesn't allow the marketing messages to be efficient and effective: the noise (Fig. 1). The noise distorts or disrupts a message and it is always present in any stage of the communication process. The most common form of noise is clutter, because everyday customers are exposed to a lot of messages, such as, eight minutes of commercials per half hour of TV and radio, a newspaper full of advertisements, endless billboards and websites with commercials (Clow *et al.*, 2010).

2.1.2. Communication Tools and Channels

For marketers, the selection of a marketing communication tool is becoming one of the most difficult and pressing tasks at a global level (Foley *et al.*, 2005 cited by Danaher *et al.*, 2011). The maturing of retailing market allowed the growth of competitors and as consequence, the competition environment is becoming more and more severe. Confronted with this threat, companies normally use the communication tools to reach competitive advantage (Kotler *et al.*, 2006 quoted by Hsu *et al.*, 2009).

The traditional difference among the communication tools "above the line" and "below the line" is a little outdated. Nowadays, the combination of the different communication variables to achieve the objectives efficiently it's called Communication Mix (Brochand *et al.*, 1999). The elements of communication mix can be used in different manners with the goal of maximizing the communication activities (Holm, 2006). The eight major modes of communication mix stated by Kotler *et al.* (2009) are: advertising, sales promotion, events and experiences, public relations and publicity (composed by nonpersonal channels), direct marketing, interactive marketing, word-of-mouth marketing and personal selling (composed by personal channels). A personal communication channel allows two or more persons communicate face-to-face or person-to-audience and its effectiveness depends on the

individualization presentation and feedback, while a nonpersonal communication channel are communications directed to more than one person.

Advertising is a non-personal presentation form (paid), which reaches many geographically dispersed targets, at the same time (Kotler *et al.*, 2009). The advertising channels/media are: print ads (magazines and newspapers), television and cinema ads, radio, billboards and public spaces (movies, airlines, sports arenas and stadiums, elevators, buses and bus shelters, subways, trains, garbage cans, parking meters, airport luggage carousels, gasoline pumps, etc), inner and outer packaging, product placement, point of purchase, among others (Kotler *et al.*, 2009). Rossiter *et al.* (1999) quoted by Hsu *et al.* (2009) defended that the television is the most powerful media to reach customer's attention through images and sound, when a company wants to announce new product information, however, from the point of view of Kotler *et al.* (2009) all advertising channels allow the creation of a long term image for a product and quicker results. The advertisement tool enables the seller to repeat the message many times and the buyers receive and compare the messages among other competitors. Moreover, it's a "monologue in front of", once the target audience is not obligated to pay attention or respond to the ads. So, it's a hard tool regarding the evaluation of results because it doesn't provide direct feedback (Kotler *et al.*, 2009).

Advertising "*offers a "reason" to buy, but sales promotions offer an "incentive" to buy*" (Kotler *et al.*, 2009:554). Honea *et al.* (2005) & Laroche *et al.* (2003) cited by Hsu *et al.* (2009) defined Sales Promotion as short-term techniques to induce customers' awareness with the goal of them gain interest in buy products or services. Indeed, sales promotions are short-term incentives aiming to stimulate the purchase, promote experimentation, acknowledge new products, sell the unsold stock or combat the seasonality of the purchase of determined products/services (Brochand *et al.*, 1999). They can take several forms: coupons, free trials, price-off (straight discount of the price list), contests, premiums and gifts, prizes draws, games, sampling, cross-promotions, price packs ("two for the price of one"), demonstrations, among others. This tool can attract new customers, captures the attention of audiences and can lead them to the product, because it "invites" customers to engage with the purchase at that moment (Kotler *et al.*, 2009), or by other words, "*tempting customers to make impulse purchases*" (Honea *et al.*, 2005 & Laroche *et al.*, 2003 cited by Hsu, 2009:42), therefore, the sales promotion have a quicker and strong feedback from the audience and, as consequence, boost the sales (Kotler *et al.*, 2009).

Events and Experiences are indirect “soft sell” in which the consumer feels personally involved, because they are company-sponsored activities and programs which are “*designed to create daily or special brand-related interactions*” (Kotler *et al.*, 2009:512). Communication platforms of events and experiences may be sports, entertainment, festivals, arts, street activities, factory tours, cause events and less formal activities that create new brand interactions with customers (Kotler *et al.*, 2009).

In Public Relations and Publicity, a variety of programs are “*designed to promote or protect a company’s image or its individual products*” (Kotler *et al.*, 2009:512). Its intended objectives are the creation of a good reputation, credibility, involvement, improvement of the company’s image, inform and increase further notoriety (Brochand *et al.*, 1999). Both modes of communication are composed by a lot of supports such as, publications (annual reports, brochures, articles, company newsletters and magazines), special events (seminars, conferences, trade shows, contests, anniversaries, etc), sponsorships, news (press release) and identity media (visual identity which the public instantaneously recognized, carried by company logos, brochures, business cards, uniforms, dress codes, etc) (Kotler *et al.*, 2009). Some public relations activities like protecting the environment, donating money to charitable organizations or doing other activities favorable to the community also contributes to increase the company’s goodwill (Belch *et al.*, 2004 quoted by Hsu *et al.*, 2009). Public relations and publicity have the advantage of reaching people who avoid salespeople and advertisements. These tools, together with other communication-mix modes can be very successful (Kotler *et al.*, 2009).

The Direct Marketing communicates directly to a specific target audience (without intermediaries) through different channels such as direct mail (newsletter), catalog marketing, telephone (telemarketing), blogs and mobile devices, aiming to obtain a response or dialogue from specific customers. From the measuring of those responses, marketers can perceive which campaigns are being more profitable. Direct marketing can reach the customers at the right moment and makes the company’s offer and strategy less visible to competitors (Kotler *et al.*, 2009).

The impact of internet in consumers’ life has continually growth as well as the number of internet users, either individually or enterprise level (Lindon *et al.*, 2004) and a new toll emerged. Interactive Marketing is based on online programs and activities in order to engage customers, increase awareness, improve image and generate sales. In the interactive and direct

marketing tools, the message can be customized, prepared very quickly (up-to-date) and changed, depending on the customer response. Some online channels are websites, microsites, search ads (paid-search or pay per click ads), banner ads, internet-specific ads and videos, online communities, e-mail, mobile advertising, etc (Kotler *et al.*, 2009). Carrera (2012) identified, among other promotion channels, the social networks, such as, the Facebook and LinkedIn, which allow the creation of pages, groups and announces. The promotions on online media are, usually, cheaper than physical advertising because they don't have geographical barriers (24/7/365), allow instantaneous communication (the realization of the announcement does not depend on deadlines such as it happens in the physical world) and receive the statistics in real time, allowing the recognition of the market reaction minute by minute, enabling to change the campaign if it's not having the desired outcome. However, the virtual communication brings some disadvantages such as the difficulty in reaching customers, because the competition offer is huge and everything is at a distance of a click, there is the hypothesis of not communicating with the right people (the records on databases may not be 100% accurate) and some people are still reticent regarding the digital world, but it is predictable that this number will be reduced with the course of time (Carrera, 2012).

Other personal communication toll is Word-of-Mouth (WOM). The usually definition of WOM consist in an “*informational communication about the characteristics of a business or a product, which occurs between customers*” (Westbrook, 1987 quoted by Nadeem *et al.*, 2011). WOM is a person-to-person oral, written or electronic media communication, which transmit the purchase or products usage experiences. WOM happens when and where people want it and it's a communication form with credibility (people trust others who know the product), very personnel (because some products or services require intimate dialogues to explain the experience and express opinions) and persuasive (Kotler *et al.*, 2009), once WOM communication influence consumer attitudes and purchase behavior (Christiansen *et al.*, 2000 quoted by Nadeem *et al.*, 2011). According to Balter *et al.* (2006) cited by Kotler *et al.* (2009), there are two important forms of WOM that should be highlighted: buzz and viral marketing. Buzz marketing create excitement, publicity and transmit new relevant brand related information across unexpected or outrageous means (Rosen, 2000 quoted by Kotler *et al.*, 2009), while viral marketing is a kind of “word of mouse” to lead consumers to pass audio, video or written information to others online about the products and services developed by a company (Silverman, 2001 & Rosen, 1999 cited by Kotler *et al.*, 2009).

The Personal Selling communication tool involves two or more people communicating directly face-to-face. Personal Selling takes many forms, such as, sales presentation, sales meeting, incentive programs, samples, fairs and trade shows. It's the most effective element of communication-mix, because the personal selling creates an interactive and immediate scenario and can build a relationship with the audience, receives an immediate feedback from the customers (they have some kind of pressure or obligation for having listened to the seller) and obtain answers from questions (Kotler *et al.*, 2009).

2.1.3. Integrated Marketing Communications

Integrated Marketing Communications (IMC) is a new paradigm (Kitchen & de Pelsmacker, 2004 quoted by Kailini, 2012) and a new way to develop marketing communications (Kailani, 2012).

The IMC concept was introduced in 1980s (Reinold *et al.*, 2012) but only in the beginning of 1990s it revealed to be an important milestone in the development of the marketing discipline (Kitchen, 2003 quoted by Holm, 2006) and has become well known at on an international level (Holm, 2006). The developments and shifts in markets, media, communications and consumers' needs (Reinold *et al.*, 2012), the quick globalization and the fast technological developments have driven to the evolution and diffusion of the IMC concept (Holm, 2006).

In accordance with Zahay *et al.* (2004) cited by Reid (2005), the IMC consist in a *"planning process that evaluates the strategic and synergistic role of a variety of communication disciplines and considers how best to integrate them across the firm"*. Smith *et al.* (1999) quoted by Holm (2006:24) goes further and distinguished the IMC in three definitions:

- 1) *"Management and control of all market communications;*
- 2) *Ensuring that the brand positioning, personality and messages are delivered synergistically through all the communication's elements and are delivered from a single consistent strategy;*
- 3) *The strategic analysis, choice, implementation and control of marketing communications which efficiently (best use of resources), economically (minimum costs) and effectively (maximum results) influence transactions between an organization and its existing and potential customers and clients."*

In line with Smith *et al.*, Kitchen and Schultz (1999) cited by Danaher *et al.* (2011:8) stated that the IMC is the combination of the communication mix's elements in which the "*the strengths of one channel are used to offset the weakness of others*". Thus, creating the synergy, this is, coordinating the messages for delivering more impact (Schultz, 1993 quoted by Danaher *et al.*, 2011) among the different communication channels, it's possible to presents a single unified position (Schultz, 1999 quoted by Danaher *et al.*, 2011).

Currently, the idea that the main marketing objective is to satisfy customers is universally accepted instead of finding and persuading people to purchase what a company produces (Kailani, 2012). Butler and Peppard (1998) cited by Kailani (2012) stated that the "heart of marketing management" is to perceived the consumer psychology. Supporting this idea, Kailani (2012) referred that understanding psychology issues, such as how consumers think, feel and select amongst different alternatives, marketers can adjust and improve their marketing campaigns to more effectively reach the consumers. Kotler (2000) quoted by Kailani (2012) also considered the study of consumer behavior as being essential to marketers in order to communicate with their customers successfully. Hence, the IMC start with the focus on consumer, searching for the most appropriate and effective combination of communication channels (Danaher *et al.*, 2011), therefore, companies must adopt a "360-degree view" over consumers aiming to perceive all the different manners that communication can influence their behavior (Kotler *et al.*, 2009).

So, the IMC might produce a stronger and consistent message and can help to build brand equity and create better sales results. Moreover, IMC should make the company's performance better in to reach the "*right customers, with the right messages at the right time and in the right place*" (Schultz *et al.*, 2003 & Schultz *et al.*, 1992 quoted by Kotler *et al.*, 2009:533).

2.1.4. Brand awareness: The effect of advertising and promotion tools on it

A product is something manufactured in a factory and can be copied by a competitor, but a brand is something purchased by a consumer and it is unique (King quoted by Lindon *et al.*, 2004). A brand is defined as a "*name, term, sign, symbol or design, or a combination of them, intended to identified the goods or services of one seller or group of sellers and to differentiate them from those of competitors*" (Kotler *et al.*, 2009:276).

An important concept of branding is brand equity, this is, the differential effect that brand knowledge has on consumer response, which may be reflected in the way consumers think, feel and act to the brand (Kotler *et al.*, 2009). Brand knowledge is formed by two components: brand awareness and brand image (Keller, 1993 quoted by Wang *et al.*, 2010). Thus, brand awareness precedes brand equity because it helps to build the last (Aaker, 1991 quoted by Huang, 2012).

Brand image is the “*set of brand associations that consumer retain in their memory*” (Keller, 1993 quoted by Wang *et al.*, 2010:180) and it can influence the consumer’s purchase intention (Esch *et al.*, 2006 cited by Wang *et al.*, 2010). Faircloth *et al.* (2001) & Lassar *et al.* (1995) quoted by Wang (2010) pointed out that a strong, favorable and unique brand image can lead to consumers' willingness to pay for premium prices. Zhou *et al.* (2004) cited by Wang *et al.* (2010) even mentioned that more important than the brand’s credibility when consumers are buying a specific brand it’s the brand image association, such as Louis Vuitton handbag, in which the brand becomes an extension of the individual’s self image. In turn, brand awareness is related with what consumers know about a brand and with the consumers’ ability to recall or recognize a brand (Keller, 2008 quoted by Huang *et al.*, 2012) in different contexts and situations (Rossiter & Percy, 1987 quoted by Wang *et al.*, 2010). The consumers recognize a brand when they have the ability to confirm their “*prior exposure to the brand when given the brand as a cue*” and recall a brand when they can “*retrieve the brand from memory when given the product category as a cue*” (Keller, 1993 quoted by Wang *et al.*, 2010:179).

Brand awareness provides advantage over the brand (Keller, 2008 quoted by Huang *et al.*, 2012) and affects consumer decision-making, because the brands that customers already know have a major probability of being included in their consideration set (Hoyer *et al.*, 1990 & MacDonald *et al.*, 2000 cited by Huang 2012). Pae *et al.* (2002) cited by Wang (2010) even referred that consumers prefer purchase a brand well established and familiar to them. Moreover, consumers also can use brand awareness “*as a purchase decision heuristic*” (Hoyer *et al.*, 1990, MacDonald *et al.*, 2000 cited by Huang 2012:92).

Thus, brand awareness contributes to boost market performance (Huang *et al.*, 2012). However, Mowen *et al.* (2001) cited by Huang *et al.* (2012) stated that sometimes consumers don’t follow the cognition-affection-action procedure (namely with products which involving low financial risk, like convenience products) because there are other factors such as,

shopping environment, product placement and on-the-spot promotion, which can influence the consumers' purchase decision and, consequently, the market outcome.

In order to enhance brand awareness, previous researchers focus on the use of some tools like advertising and promotions. Promotions (of price and non price) generate brand switchers and brand sales, which induce of product usage experience, and consequently, in creation of brand awareness (Huang *et al.*, 2012). On the other hand, the advertising allows the exposition of the brands to customers, providing the creation and growth of brand awareness (Aaker, 1991; Batra *et al.*, 1995; Keller, 1993; Rossiter *et al.*, 1987 & Yoo *et al.*, 2000 cited by Huang *et al.*, 2012). Advertising also increases the possibility of a brand to be included in consumer's choices set, improving the brand performance on the market (Krishnan *et al.*, 1993 quoted by Huang *et al.*, 2012). Clark *et al.* (2009) stated that the role of marketers for stimulate the consumer to select their brands consists firstly on inserting the brand in consumers' choice set and, after that, encourage the consumer to prefer their brand over all the other brands. He even added that the advertising can facilitate this process of building a brand preference.

2.2. Shopping Centers.

“Shopping is one of the activities included in the lives of city dwellers and that nowadays is mostly carried out in shopping centers.”

(Cachinho, 2001:135)

2.2.1. Concept and business

The concept of “shopping center” has been progressing since the beginning of 50's. A shopping center is “*a group of retail and other commercial establishments that is planned, developed and managed as a single property*” (Levy *et al.*, 2004:218), with parking facilities and a balanced tenancy (Berman *et al.*, 2004). Its size, location and balanced tenancy (mix of stores which complement each other as to quality and variety of products offerings) are associated with the trading area served (Berman *et al.*, 2004). The ICSC (International Council of Shopping Centers) defined shopping centers in two main configurations: Shopping Mall and Open-air Center. The Shopping Mall is “*typically enclosed, climate-controlled and lighted, flanked on one or both sides by storefronts and entrances*” and the Open-air Center is “*an attached row of stores or service outlets managed as a unit*” (Goedken, 2006:80).

The shopping centers are a combination of large anchor stores and many small stores. More and more shopping centers include banks, dentists, doctors, beauty salons, car rental offices, among others, and the well-balanced assortment of goods and services attract customers interested in “one-stop shopping” (Berman *et al.*, 2004). For that reason, mall managers like to have all stores that attract a certain type of target market located together and thus, customers know what can be expected in a particular location within the shopping center (Levy *et al.*, 2004).

Furthermore, shopping centers also offer “temporary tenants”: rental spaces in mall aisles, where retailers sell from booths or moving carts. The rents of these “temporary tenants” are lower and have a short-term commitment, which allows shopping centers create more excitement and diversity in shopping and consumers to face up to new vendors in unpredicted places (Berman *et al.*, 2004).

The level of competition within shopping centers can be very intense, which is difficult for small stores to compete with large department stores. Shopping centers are facing outdoor competition too, due to other types of retail location alternatives (such as, power centers¹, catalogs and internet) (Levy *et al.*, 2004) and the big number of shopping centers existing in the same area (Berman *et al.*, 2004).

The contemporary business of shopping centers is based on the old trilogy: (1) acquire new customers; (2) increase the average purchase of the regulars’ customers of the shopping center; (3) increase the frequency of visits from existing customers. Nevertheless, the predictable trends for shopping centers point out that the forms and levels of relationship with customers will increase aiming to find out a deeper knowledge about the client and the resulting loyalty (Dionísio quoted by Carvalho, 2006).

2.2.2. Communication

In addition to the commercial offer, it’s fundamental that the shopping centers offer values of their own brand to their consumers and the communication is the key support to achieve this (Dionísio, quoted by Carvalho, 2006).

¹ A Power Center is a shopping typical unclosed and include several unconnected anchors (discount stores, off-price stores, warehouse clubs or category specialists (e.g. Home Depot, Office depot, Sports Authority, Toys’R’us) and a minimum number of small stores (Levy *et al.*, 2004). According to the Yearbook of APCC (2011), a power center is also known as a retail park.

When clients/city dwellers go to a shopping center, they are certain that they will find answers, in the form of goods and services, for their needs and desires. Thus, the communication of a shopping center should pass the message that the customers will fulfill their needs and realize their desires in that place. The communication helps consumers to choose a brand instead another, in this case a shopping center, because they feel comfortable with it (Athayde, quoted by Carvalho, 2006).

In accordance with Athayde (cited by Carvalho, 2006:265), shopping mall is a synonym of “*commodity, proximity and convenience*” (as a general rule “*nobody likes to across an entire town to shop at the shopping mall A, when the shopping mall B close to home*”, therefore, it should communicate first internally. The customers who ever goes to the shopping mall should be informed about the reasons why they should return and, moreover, they should be convinced to be prescribers of the shopping center, because there is no better publicity (of malls) than “word of mouth” (Athayde quoted by Carvalho, 2006).

To conclude, Pereira cited by Carvalho (2006) referred that shopping center communication is accomplished at two levels: (1) institutional level, which promote the brand, increase the brand awareness and reputation and reinforce the shopping image; (2) “product” communication level: campaigns, actions and traffic’s animation initiatives of the shopping center aiming attract visitors, maintain customers and increase the tenant business.

2.3. Gift Cards

2.3.1. Brief Introduction

Gift vouchers (paper gift or certificates) were introduced in the market from the beginning of 20th century (Horne, 2007). During the 1990s, the paper gift began to be replaced by the plastic gift card with a magnetic strip (Hudson, 2005 cited by Anitsal *et al.*, 2011) or a barcode (Offenberg, 2007) representing, therefore, the boom of gift cards and increasing the number of shoppers who started to use them (Anitsal *et al.*, 2011). The gift cards are very trendy (Abrolat, 2007) and have additional value regarding the gift vouchers, because it’s not necessary to spend the total value of the card at once and the purchases are automatically deducted in the card (Offenberg, 2007).

Gift certificates or vouchers didn’t achieve the same popularity than the gift cards. They never have the same treatment in terms of disclosure, they are “hidden” and the costumers have to

go to the sales person or go to the balcony and ask for them. In contrast, gift cards are sold as another product of the store, with a high visibility, a good merchandising and a strong point of purchase. Some gift cards can be personalized with statements, greetings or images and they can be offered jointly with small or complementary gifts, such as “*a body lotion packaged with a gift card to a bath store*” (Tuten *et al.*, 2009:68). In spite of the “*merchandising is a key factor in the popularity of gift cards*” (Tuten *et al.*, 2009:68), retailers are still researching different ways of gift cards can be adjust to costumers preferences (Warren, 2008 cited by Tuten *et al.*, 2009).

2.3.2. Advantages

As stated in article of the Accountancy’s Journal, “*gift cards offers buyers and gift recipients a variety of products, but restrict those choices to a single or limited number of retail service providers*” (Kile Jr., 2007:39). In contrast, Offenber (2007) referred that, if gift givers and gift receivers appreciate to give and receive gift cards, respectively, so the restriction of a particular store should represent an add value in the gift instead of a limitation. Besides, one of the factors driving the rise of gift cards sales is the quick extension of chain stores, because “*gift cards can now be purchased and redeemed nationally*” (Offenber, 2007:229)

Bolt (2004) quoted by Offenber (2007:229) mentioned that Dick Outcalt of Outcalt & Johnson Retail Strategists calls gift cards a “win-win-win situation”, because they are a win for the gift-giver (“*it relieves the pressure of deciding on an appropriate gift*”); a win for the receiver (“*he can choose what they want and when they want to buy it*”) and of course, a win for the retailer. First of all, it’s evident that the retail will always win just with the purchase of the gift card. However, there are other factors which contribute to the gift card to be a profit for the retailer, such as the new magnetic strip technology, which allowed the creation of the ability to account for sales electronically, contributed positively to reduce costs and consequently improve the growth of gift cards (Offenber, 2007). Kile Jr. (2007) also considered the gift cards a profit for retailers, because they influence some undecided people to make purchases that otherwise wouldn’t, which lead to the growth of sales. Moreover, the fixed value of the gift card represents the minimum value that will be spent, because the receiver could spend more than the offered value. Gift cards also represent additional sales when they are not deducted or use. In some companies, the unredeemed balances of gift cards represent a great slice of profits. Besides, the gift cards may generate marketing opportunities,

because when it's offered to someone, the retailer can acquire two customer contacts and two sales opportunities.

2.3.3. Types

Prepaid gift cards are “pay in advance” cards, “*which store money but are not linked to a bank account*” (Groine, 2009:10). As Groine (2009) stated, there are two types of prepaid cards: open-loop cards and closed-loop cards.

The open-loop cards or “network-branded” gift cards are redeemable at any merchant on a credit card system, which bear the logos of MasterCard, Visa or American Express (Horne, 2007) therefore, they “*are accepted at all locations, such as retail stores or ATMs displaying that card logo*” (Groine, 2009:10). In a deeper definition, open-loop cards are transaction devices that are not tied closely to the ultimate purchase, therefore the card issuer must rely on fees for revenues. “*The fees include an issuance charge, an interchange fee for utilizing the payments network, and any "back-end" fees associated with dormancy or expiration of unused balances*”² (Horne, 2007:345).

The closed-loop cards or “retailer-specific” cards (Horne, 2007) are limited to specific merchants, and “*are generally issued by stores or retailers as a part of their marketing programs*” (Groine, 2009:10). They generate revenue through the margins on the goods purchased with the cards³ and through the small amount from the cards that are not redeemed (Horne, 2007).

Apparently, the closed-loop card looks more appealing to retailers. For them, the benefits included in a closed-loop card are the acquisition of new customers, increasing store traffic and increment spending. Regarding an open-loop card, many points of sales don't have the capability to accept split tender transactions and the card can only be used when the amount is equal or less than the total of the card. For instance, if a customer has a \$50 open-loop card and wants to buy an article that costs \$51, the card will be rejected even if the customer offers to pay the remainder in cash. Further, in some places the open-loop cards can only be accepted if the customer makes purchases above a minimum limited fixed by the store (Horne, 2007). However, the "back-end" fees may alter the returns of an open-loop card,

² Example: “If a consumer uses a \$50 open-loop gift card, the issuer collects around \$4 to issue the card (split with whomever actually sells the card) plus the interchange fee on the \$50 purchase (around 2%). This yields a gross margin of just over 6%” (Horne, 2007:346).

³ Example: “If a consumer uses a \$50 Old Navy gift card to purchase \$50 worth of goods, Old Navy has a gross profit equal to the \$50 minus their cost of goods sold”.

because the *“revenue at the back-end, accomplished by widespread usage of dormancy fees sometimes surprisingly short expiration dates, can generate substantially better returns”* (Horne, 2007:346). For costumers, the open-loop cards would seem to have more advantages than the closed-loop cards, due to the multiple and different choices that they provide. However, the costumer should be aware of the risks associated with the different card options since the open-loop cards also include negative features (Horne, 2007).

According to Alves *et al.* (2007) the “Private Label” concept is related to the own brand products which are marketed under the brand of large retail chains, aiming to increase the market share, its sales or profit margins. The food products are the most popular type of "Private Label" products. However, this term is also used to refer to Private-Label cards, also known as "Store Cards". The Private Label card is a *“payment method that provides a credit line pre-approved to the customer acquire goods or services within specific establishments that comprise a private business network”* (Alves *et al.*, 2007:15). The Private Label cards are usually issued by large retail networks like hypermarkets, department stores and clothing stores (Alves *et al.*, 2007).

The Private Label cards can acquire different forms: debit cards, purchase cards and property cards (Alves *et al.*, 2007). The debit cards are used to acquire goods or services only in a specific retail points and have the advantage of guaranteeing the receiver the credit which was previously approved. The main disadvantage is the charging interest on the outstanding balance when the purchase is done. However, *“each card can have the profile desired by the merchant and thus, in some cases, provide deadlines, grace period and even lower rates than those prevailing on the market”* (Fortuna, 2002 quoted by Alves *et al.*, 2007:14). The purchase cards are those *“that can only be used in the network that corresponds to its brand like the Marina⁴ card, accepted only in Marina Shops network”* (Lima, 2003 cited by Alves *et al.*, 2007:14). Lastly, the property cards *“are normally issued by the retailers, aiming to retain clients and offering benefits”*, (Cardnews, 2005 quoted by Alves *et al.*, 2007:14) such as, the partial payment of purchases and a scoring system with gifts.

2.3.4. Selection: Gift givers and gift receivers’ perspective

Gift exchanges are related to ties among people (Austin *et al.*, 2012). They vary with the intimacy and strength of the relationship, with the perceptions of giver and receiver identities

⁴ Marina is a Brazilian Store.

(Belk, 1979 cited by Tuten *et al.*, 2009) and the perceived importance and periodicity of the gift-giving situation (Wolfenbarger, 1990 cited by Tuten *et al.*, 2009).

From the standpoint of Horne and Kelly (1995) cited by Horne (2007), the gift cards fulfill gifting obligations, reducing the giver's risk of a poor gift selection. Austin *et al.* (2011) pointed out that consumers are mainly driven by emotional reasons (more than rational and economics reasons) when selecting gift cards instead of gift items. The choice of a gift card can indicate how the giver wants to be perceived by the receiver and also may reveal the giver's perception of the receiver's lifestyle and preferences. Although, gift card buyers should be aware of the occasion, the store and the amount of the gift card so that the receiver can enjoy it. For instance, the value for a wedding gift card can't be equal to a birthday gift card.

In accordance to the gift receivers hierarchy (Austin *et al.*, 2011), the best gift options are (by order of preference): a personal gift (e.g. handmade), a specific gift, cash, a general specific gift card (VISA) and a store-specific gift card. In the gift givers hierarchy, the best gift options are, by preference order, a personal gift (e.g. handmade), a specific gift, a store-specific gift card, a general specific gift card (VISA) and at least cash. Thus, Austin *et al.* (2011) concluded that gift cards aren't considered the best present to offer, because they reveal the little knowledge the giver really has about the receiver. The gift card selection has been revealed an easy task when the gift giving doesn't know well enough the receiver or is not comfortable in offering him a gift item (Austin *et al.* 2011 & Otnes *et al.*, 1993 cited by Austin *et al.*, 2012) and also considered a "last resort" option, after gift buyers can't find a better specific item for the receiver (Austin *et al.*, 2012). From the standpoint of Horne and Kelly (1995) cited by Horne (2007), the gift cards fulfill gifting obligations reducing the giver's risk of a poor gift selection and decrease the chance of the receiver not being satisfied with a specific gift (Austin *et al.*, 2011) and therefore, they are considered as a "first choice" (Austin *et al.*, 2012) when the gift giver has afraid to buy the "wrong" gift.

2.3.5. The value loss of gifts: monetary gifts and non-monetary gifts

Waldfoegel (1993) cited by Offenbergl (2007:230) explored the gap among the price of a good to the giver and the value for the receiver and called this gap the "deadweight loss of Christmas". His findings revealed that the gap is bigger for gifts from family and smaller for gifts from friends and "significant others" and concluded that *when the gift giver knows more about a gift receiver, the value of the giver will be closer to the value of receiver*".

Offenberg (2007) referred that the gift giver can give a gift card with a great face value⁵, but he always takes the risk of this value not being enough for the receiver. Even so, in accordance with Tuten *et al.* (2009), receivers prefer receive monetary gifts due to their functional/utilitarian value which allow apply the money to any need. In other article, Waldfogel (1993) quoted Austin *et al.* (2011:11) referred that “*non-monetary gifts make little sense and are a source of potential deadweight loss when givers and receivers do not perceive equal value of the gift items exchanged*” and thereby, the gift cards can help gift givers and receivers avoid this deadweight loss, if not entirely eliminate it. Camerer (1988) quoted by Tuten *et al.* (2009) also indicated that the gift givers should offer monetary gifts instead of figure out what the receivers really want. In the same line, Liao and Huang (2006) cited by Austin *et al.* (2011) stated that monetary gifts are convenient when a receiver is difficult to satisfy with a non-monetary gift and gift cards solution can aid to transform difficult receivers into easy ones. For the receivers, the possibility to choose their own gift between a set of alternatives, will probably be more useful than a gift item (Austin *et al.*, 2011).

Hence, Offenberg’s (2007) also made a comparison between gift cards and cash gifts, where the last are normally seen as inappropriate gifts. In spite of gift card might seem more meaningful than a cash gift, in both cases the total amount spent will be revealed to the receiver. In a receiver’s perspective, a cash gift is more convenient and would offer him more flexibility because he can decide where to buy the gift, however, in a gift giver perspective, gift cards offer considerable convenience and they make the gesture more memorable than a cash gift. Moreover, Offenberg (2007:231) stated “*if consumers are perfectly informed of their own preferences, then a gift-giver will be unable to produce a higher utility-increasing gift for the recipient than cash*”. Otherwise, if consumers are not completely confident regarding their own preferences, the gift-givers have the opportunity to offer a gift card that possesses value from a store that the receiver has no knowledge, but that fits their personality or style.

⁵ The amount of the store’s credit stored on the gift card is denoted by “face value” (Offenberg, 2007).

3. METHODOLOGY

For a deep information analysis it was used primary and secondary data. The primary data was collected from Sonae Sierra, namely through the Legal Department, Mall Activation Department (in which the Gift Voucher Business makes part of) and the MID - Market Intelligence Department. The MID made a great contribute to understand the gift cards' consumers, through a qualitative market research and was also responsible for the survey about the penetration rate of the SGV on the market. For all the other topics regarding information analysis, were used secondary data.

Concerning the Pest Analysis, (Political-Legal, Economic, Sociology and Technologic Environment Analysis) the data collected was obtained through reliable sources such as Sonae Sierra Legal Department, newspapers (ionline, *Jornal de Negócios*, *Oje* and *Sol*), Eurostat report, Cushman and Wakefield Spring'11 report, *Instituto Nacional de Estatística* (INE), Tek-Sapo, Marktest, Socialbakers and trendwatching.com. The retail sector analysis was analyzed throughout the Vida Imobiliária Report, the Cushman and Wakefield reports (Spring'11 and Autumn'12) and the Yearbook 2011. It's important to point out that the Pest analysis (except the political/legal environment), as well as, the sector analysis was based on the retail sector, due to the lack of market information about the gift cards.

The information about the competitors was gathered after consulting the respective official websites

The qualitative market research was conducted by a Consultant Company, requested by MID in September 2011, concerning the specific SGV and the gift cards/vouchers market. The research has helped to understand how consumers evaluate the Surprise product, how gift cards/vouchers are perceived by who buy and receives them and, contributed also to realized how the gift card/voucher market is organized from the consumer perspective. The sample was composed by male and female consumers aged between 20 and 44 years old, living in Lisbon, Oporto and Algarve, belonging to the middle and upper class, with a variety of family profiles. The consumers selected were regulars of Colombo Centre, Vasco da Gama Centre, Norte Shopping, Gaia Shopping and Shopping Centre Continente Portimão that have already considered the purchase of a gift card/voucher and have done it at least once. The qualitative methodological approach used for the research had three distinct phases: Observation (to Sonae Sierra employees, where only 7 answers were valid), Online Immersion (participation of a restricted group on Facebook: 7 participants) and four Mini focus Group with a duration

of 90 minutes (in which a total of 20 individuals participate). The main source for the description of Portuguese's consumer behavior trends was a study performed by the Consumer Intelligence Lab. To reinforce some of these trends not only in Portugal, but worldwide, we consulted the Euromonitor International and the trendwatching.com predictable trends.

The company and SGV information was provided during my internship during 2011/2012 at the Mall Activation Department. The qualitative market research described above also gave information about the SGV's consumers. In order to collect quantitative data analysis about the SGV's penetration, a questionnaire was conducted by the MID in March 2011. The total sample was composed by 500 interviews equally applied to the Municipalities of Great Oporto and Great Lisbon. The interviewed profile was composed by 51% of female and 49% of male, with ages between 16 and 65 years old or over. In the Annex 3.1 there's represented the sample profile regarding the age class and the social class. The survey was accomplished by phone and its error margin was 4,4%.

Finally, through the analysis of all the data and information collected previously, a SWOT analysis was designed, in which the strengths, weakness, opportunities and threats of the Surprise gift voucher were identified. The interesting conclusions obtained from the SWOT analysis, as well as, the entire chapter will lead to the creation of a proposal of an effective communication plan, presented in the chapter 5.

4. INFORMATION ANALYSIS

4.1. External Analysis

4.1.1. PEST

Political-Legal Environment

Under the rules of E-Money legislation, a new legal context is being prepared by Portuguese Governmental Entities. This new legislation will impact expressively on the gift card business, because the client will have the right to convert the gift card amount in direct money (paid in cash with no additional costs, during one year) or for the residual amount, after the expiration date of the card (paid by bank transfer and with possible extra cost) (Source: Sonae Sierra Legal Department).

In general, the unredeemed gift cards represent a big slice of sales and therefore, if this legislation goes ahead, the impact on sales will be high due to the fact that, no company will be allowed to consider the breakage amount as an income.

Economic Environment

Portugal is now facing one of the biggest financial and economical crises of all times. The public debt in 2012 achieve 123,6% of the GNP, more 15,3% than in 2011 (Agência Lusa online, March 2013). The unemployment rate reached historical values in the last quarter of 2012, achieving 17,3% (Eurostat, 2013) and the prediction is that it will continue raising, probably until 19% until the end of 2013 (João Sousa Andrade in JN, March 2013).

The State Budget for 2013, approved in the end of last year, is probably one of the toughest and troubled, because it includes further austerity measures and more taxes which will have a huge impact on consumption. Government previsions point towards a breakdown of 2,2% in private consumption and 3,5% in the public one in 2013, but they expect a growth in the GNP in the second semester of 2013 (Oje, September 2012).

In accordance with the provisionally data of Eurostat, the purchase power of the Portuguese population in 2011 was only 77% at the European level (minus 4% than in 2010), assuming Portugal, the 9th place among the poorest countries in the 27 countries of the EU (JN, June 2012).

The actual economic recession isn't favorable to any market sector. In accordance with Cushman & Wakefield report (Spring, 2011), the downsizing on the private consumption has been and will be one of the biggest challenges for the retail sector in the next years. The loss of purchase power, the raising of the families' debt and the unemployment growth, will impact on the positive evolution of the retail market business.

In 2011 the shopping centers invoiced nine thousand millions Euros, less than one thousand millions Euros than in 2010. Nevertheless, the decrease in sales was higher than the number of visitors (less 8,18% in 2011). In 2011, each Portuguese that frequented a shopping centre spent, in average, less 10% than in 2010 (equal downsize in the retail sector) (Sol, February 2012).

With all the austerity measures, the available income of families will be even more reduced and the consumption recession will remain. The Portuguese families will need to reevaluate their priorities in consumption spending and take in consideration the capability to save money for an uncertain future.

Socio-Cultural Environment

In 2011, 65,8% of the Portuguese population was between 15 and 64 years old, which represents 6.933.000 habitants of the total population (INE, 2012).

Portugal is also facing a social crisis. The raise of taxes, along with a social dissatisfaction that was never so high, is having an impact on the hope of a better future. The Portuguese population is more educated, informed and is becoming more skeptical regarding the government promises. The demanding austerity efforts required seem endless and the country is under depression and frequent crowd demonstrations.

The social differences in Portugal worsened and social unfairness is one of the most relevant subjects besides the economic crisis. The distribution of the national wealth system is becoming even more unfair and unbalanced, increasing the discrepancy between rich and poor (the poor are getting poorer and the rich are getting richer and more powerful). Portugal is one of the developed countries more unequal of the world and the studies carried out by Ernest&Young (ionline, March 2012) reveal that in 2015 Portugal will have the minimum conditions required to be classified as a poor country: slow growth rhythm (only 0,5% until 2015), decrease in public investment, high unemployment rate and recession in public and private consumption.

This economic, financial, social and (it's possible to say) political crisis, is changing the Portuguese consumption habits, attitudes and lifestyles, mainly among the young people, where the act of shopping is becoming a more planned process rather than an impulsive one. These big changes and trends will be further explained in the consumer behavior trends topic (Chapter 4.1.5).

Technologic Environment

We live in the technological revolution era. The velocity of technological advances has been exponential and its impacts are clearly visible. If companies don't accomplish progress in their manufacturing process, communication processes, and so on, they can be surpassed by competitors. Technology has provided big changes and with the evolution rhythm, there are some trends which could constitute an opportunity to companies.

The internet has clearly impacted on Portuguese people and has changed their lives. According to Marktest (Tek - Sapó, 2012), the penetration rate of internet has been presenting a positive evolution since 1997, increasing the number of users from 6,3% in 1997 to 62,8% in 2012 and representing a growth of 3,8% compared to 2011 (Annex 1.1). The young people aged between 18 and 24 years old (99,2%), the social groups with better conditions (99,2%), students (99,4%), and middle and senior managers (99%), have the highest rates of internet use contrary to the elderly, women, individuals from lower classes and domestic employees in which the rate penetration is lower.

The social networks are also important tools of marketing and brand communication. They are so important for individuals as for companies, which can interact with their customers in a rapid way (Marktest, 2012). In 2012, a study conducted by Marktest to users of social networks, aged between 15 and 64 years old and living in Portugal, revealed that 62% of the sample (n=826) follow the brands in social networks, 15% visit social networks sites as soon as they wake up and 95% have a Facebook account. Currently, the Facebook social network penetration in Portugal is 44,09% (representing 4.706.960 Facebook users) compared to the country's population and 86,28% regarding the number of Internet users. The groups which use Facebook the most are aged between 24 and 35 years old (1.220.800 users), followed by the users aged between 18 and 24 years old (Annex 1.2) (Socialbackers, 2013). The most active users group of Facebook is among 24 and 35 years old (1.220.800 users), followed by those aged from 18 to 24 years old (Annex 1.2) (Socialbackers, 2013).

The mobile technology is also a new identified paradigm. There is a foreseen trend for the present year regarding this thematic which is the “Mobile Moments”, where consumers will use their mobile phones to maximize each moment. Despite the vibrant and fast urban life, there is always a space or a time, although brief, to include more content, to connect and consume or simply to look for more fun. So, in the current year one will be watching an explosion of “Mobile Moments” where products, services and experiences will allow the customers of mobile lovers to adopt a multi-hiper-tasking lifestyle (trendwathing.com, 2013).

Regarding the technological improvements in the retail sector; Westfield, the largest shopping center operator in the world, incorporated a search functionality of Google Commerce to its in-mall mobile application aiming to save customers’ time inside their shopping centers. Thus, shoppers can search what they are looking for because the application provides information about the specific products sold in the stores and they can even compare prices among them. The application facilitates the client’s contact with the seller, because he can call directly from the application to check product’s availability (trendwathing.com, 2012).

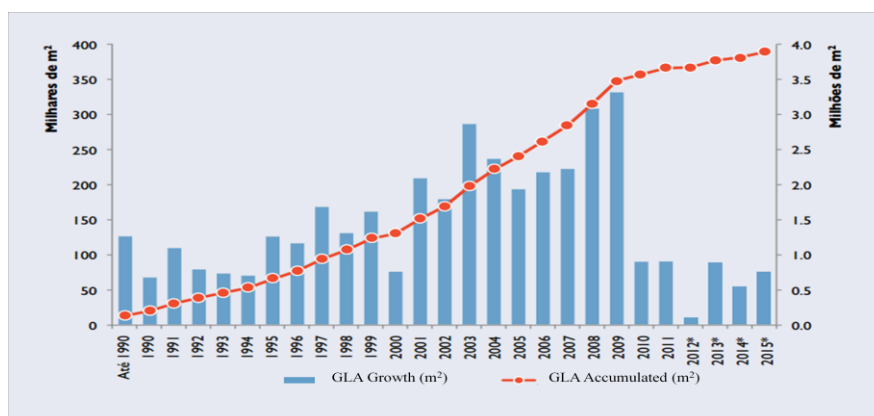
4.1.2. Retail Sector

According to Cushman & Wakefield report (Autumn, 2012), the retail sector suffered, in the first semester of 2012, the effects of his own maturity as well as the constant decline of customers purchase power. The actual crisis coupled with lower incomes contributed negatively to the decrease of sales volume. As a consequence, the reduced sales drive to “*an increase in the number of vacant retail spaces and to adjustments in rents, which in turn has caused a drop in the value of properties that in some cases has been quite significant*” (Leuven cited by Vida Imobiliária, 2012:22). Shopping centers and retail parks are the most punished ones due to this situation, where the competition among retailers is increasingly intense and the sells more difficult (Seconde quoted by Vida Imobiliária, 2012).

The graphic 1 demonstrates that the GLA (Gross Leasable Area) of the commercial complexes reached in 2009 its historical peak since 1990. According to Cushman & Wakefield report (Spring 2011), in 2010 this positive evolution suffered a breakdown, reaching the lowest GLA value from the last ten years (only 90.000 m²). This breakdown was the result of the economic retraction which was felt two years ago, but the project construction was initiated during the crisis period and, therefore, there was the full

consciousness of the new market fragilities as well as the risks associated with the execution of new projects.

Graphic 1 – Commercial Establishes’ Evolution from 1990 to 2015 (GLA)



Source: Cushman & Wakefield, Autumn 2012

Across the reading of graphic 1, it was estimated that in 2012 the total GLA will present the worst growth since 1990, representing just 10.000 m². The GLA accumulated value estimated in 2012 was 3,66 million m² and until 2015 the growth predicted was weak, entering in the marketplace only more 221.000 m² of GLA, totalizing 8 projects (news or refurbishments) (Cushman & Wakefield, Autumn 2012).

As shown in the Annex 2.1, the forecast of GLA by region until 2015 presents a decentralization of Great Lisbon and Great Oporto urban centers. There are no plans to build new commercial establishments until 2015 in Oporto, the Center region and the Islands (Cushman & Wakefield, Autumn 2012).

The shopping centers represent the major slice of retail offer (Annex 2.2), corresponding to 82% of the total (2.984.000 m² of GLA), in which the premium shopping centers have maintained their attractiveness with strategic upgrades and new stores. In contrast, the retail parks are the format less sought by retailers and they have a total weight of 12%, occupying 449.000 m² of GLA. The factory outlet centers represent the small portion of the retail offer with 218.000 m² of GLA (6%) and they are benefiting from the economic situation which has led to a growing demand from consumers, due to their kind of offer, i.e. large discounts (Cushman & Wakefield, Autumn 2012).

According to the latest official data report in the Yearbook 2011 (APCC, 2011), in the first quarter of 2011 the Portuguese Council of Shopping Centres (APCC) adds 107 shopping centers associated (includes all formats) with 8896 stores and 89.674 jobs. If one counts all

employees of shopping center management and stores, the associated centers employ nearly 103.000 workers.

Regarding the means of travel used by customers of the shopping centers (Annex 2.3), in 2011, 65% (in average) of the customers go the shopping centers by their own cars, 22% by foot and only 12,5% go to the shopping by public transportation (APCC, 2011).

Concerning the retail sector's trends, the scenario predictable is not the best. The breakdown on private consumption will remain, as well as the low sales volume and, therefore, the retail business must to be adjusted, adapting to the new patterns of consumption (Silva quoted by Vida Imobiliária, 2012)

Hence, the retail sector's evolution faces a big challenge, where some current retail projects need to be rethought because their sustainability may be putted into question or in doubt, considering a different approach within the same market segment or taking into account new alternatives uses for the asset (Rutkowski cited by Vida Imobiliária, 2012).

Further, in the near future, it will expect some shifts in tenant mix, due to the closure of some chains, that will not be able to deal with the crisis effects, and the introduction of new concepts and brands which find good business opportunities when entering now on the market (Araújo quoted by Vida Imobiliária, 2012). The secondary shopping centers are those that will be most affected by the decline of consumption (Araújo quoted by Vida Imobiliária, 2012), while the premium shopping centers will keep going the most sought, and therefore, the most attractive (Cushman & Wakefield, 2012).

4.1.3. Competitors

The gift cards market is quite diverse and has a wide range of offer. In the gift card market it's possible to distinguish between two types of competitors: the direct and the indirect. The direct competition is the outdoor competition, this is, the gift cards of the main shopping centers's competitors, and the indirect competition is the indoor competition and is related to the tenant-mix inside Sonae Sierra's shopping centers, and the ones that really compete with the actual Surprise Gift Voucher (conclusion obtained from the questionnaire about the Surprise Gift Voucher's penetration made by MID of Sonae Sierra that will be further presented).

Direct Competition

Dolce Card

The Dolce Card is the gift card associated to all Dolce Vita Shopping Centres. It's a prepaid, no rechargeable and not nominative gift card (it's not associated to any name/person) issued by UNICRE, which can be used as means of payment in Portugal at more than 50.000 participating stores (physical or virtual) through the VISA network. The gift card is just a payment card, so it's not possible to make any cash withdrawal transactions or bank transfer.

The Dolce Vita gift card can be acquired online (<http://dolcecard.unibanco.pt/>) or in the information desks of some Dolce Vita Shopping Centres⁶. The card can only be used once it's activated and if the card activation has no costs.

The face values of the card are printed in the plastic itself and can vary from values of 15€, 25€, 50€, 100€ or 150€ (and only in particular situations can be superior to 150€). The balance can be consulted through the internet and an automatic service of consultation, calling a determined telephone number and the client will only have to follow the instructions. The expiration date of the gift card can vary between 2 and 12 months. After the expiration date, the balance remaining (if exist) will not be recovered.

The Dolce Card is not segmented and it can be used by anyone, the only requirement is that the user knows how to sign. Its motto is "*A single card, one thousand gifts*".

MMM MasterCard® Gift Card

The MMM MasterCard® (Fig. 3) is the gift card associated to MMM Portugal. It's also a prepaid card, non-rechargeable and it is redeemable in MMM shopping centers of Portugal and other places where MasterCard network is accepted (offline and online payments).

The MMM MasterCard® gift card can be acquired online (<http://www.mmmgiftcard.com/>) or at the information desks of MMM Shopping Centres⁷. The cards purchased directly at the information desks don't need to be activated in contrast to the cards purchased online, due to security reasons. In both cases, the card has an activation tax of 2€.

⁶ Dolce Vita: Tejo, Porto, Coimbra, Douro and Funchal.

⁷ Almada Forum, Armazéns do Chiado, Espaço Guimarães, Forum Algarve, Forum Aveiro, Forum Coimbra, Forum Madeira, Forum Montijo, Forum Sintra e Forum Viseu.

The face values of the card vary from 10€ to 1.000€. When the values vary between 151€ and 650€ will be asked some information data to the buyer and, according to European Community regulations, specifically the recommendations of the legislation against money laundering, when the value is above 651€ it's necessary to request the buyer's identification data, such as, the identity card or passport, driving license, address, etc. The balance and recent transactions can be consulted in the site (https://cardmgt.bpscards.com/mmm/manage_my_card). The validity of the Card is one year after its activation and its motto is: "*MMM Gift Card. The card that turns into a gift*".

Mundicenter Gift Card

The Mundicenter Gift Card (MGC) is the gift card of Mundicenter Group (Fig. 4). The MGC is a VISA Electron prepaid, rechargeable and not nominative card, issued by BES, SA (Espírito Santo Bank). It's used as a mean of payment in more than 1000 participating stores of the seven shopping centres of Mundicenter Group⁸, except in Continente hypermarket, Worten, Geostar travel agency of Oeiras Parque, Citizen Store and Pingo Doce of Odivelas Parque, banks, real estate agencies and in other stores that don't have the Visa Electron network.

The Mundicenter Gift Card, can be acquired at the information desks of the seven Mundicenter Shopping Centers with a extra cost of 2,5€ related to the activation tax of the card. The buyer can load the gift card until the maximum value of 1.000€. It can be loaded at the information desk of any shopping centre belonging to Mundicenter Group or through a bank transfer for the Bank Identifier Code (NIB) printed on the back of card on any ATM machine or home banking. The validity of the card is 2 years and the balance of the gift card can be consulted in any ATM machine or trough a link available on Mundicenter Website (www.mundicenter.pt/mgc) or through a telephone number. The slogan of Mundicenter Gift Card is: "*The present that's easy to give and good to receive*".

In the next page there is a table with the comparative analysis between the three direct competitors and some communication strategies used by them:

⁸ Amoreiras Shopping Center, Arena Shopping, Braga Parque, Campus de S. João (Porto), Odivelas Parque, Oeiras Parque and Spacio Shopping (Olivais).

Table 1 – Competitors Analysis

Competitors Gift Cards Features	Dolce Card	MMM MasterCard® Gift Card	Mundicenter Gift Card
Card Type	Open-Loop	Open-Loop	Closed-Loop: Private Label Credit Card
Point of Sale	Information Desks of SC (Shopping Centers) and Online	Information Desks of SC and Online	Information Desks of SC
Denomination Values	15€, 25€, 50€, 100€ or 150€	From 10€ to 1.000€	Any value until 1.000,00€
Rechargeable	No	No	Yes
Redemption	Anywhere (physical or virtual) where Visa network is accepted	Anywhere (physical or virtual) where MasterCard network is accepted	Only in shopping centers' stores of Mundicenter Group where Visa Electron network is accepted
Validity	From 2 to 12 months	1 year	2 years
Activation Tax	N/A	2€	2,5€
Some Communication Strategies used by each Player:	<p>1. Christmas Campaign (8th to 16th Dec. 2012) - The Dolce Vita's clients that realized purchases between 100€ and 250€ could receive 40% of the amount spent, being the value refunded on Dolce Card. The customers only had to go to the information desks to validate their proofs of purchases.</p> <p>2. Valentine's Day Contest (14th February 2013) - Who wanted to participate on the contest only needed to send a romantic photo which showed all his/her passion. The winner of the most romantic photo will be awarded with a Dolce Card, with a face value of 450€.</p>	<p>1. UEFA Champion League Campaign (2011) – The campaign had three phases and in each phase, the 6 customers who bought and made the highest charge in a single MMM GC would receive a ticket for the game related to each phase.</p> <p>2. "Here you can win" Campaign Almada Forum (31st October to 15th November 2011) - This campaign was conducted once a day and it consisted on surprising a Shopping Centre visitor, in a place of the Centre, with the sentence "Here you can Win" and the visitor should answer "and Forum Almada is giving", thus winning immediately a MMM Gift Card with 500€.</p>	<p>1. Christmas Campaign (14th November until 31st December 2011) - It was delivered the value of 5€ in MGC by each person by day, upon presentation of the purchases' proof realized at the shopping center with the minimum amount of 30 €.</p> <p>2. "MGC Father's Day 2012" Campaign (1st to 19th March, 2012) – The prize was three double trips to Azores for 5 nights, with bed and breakfast included. To participate, the costumers needed only to have their own MGC or acquire one. The three winners of each centre were those who had the highest money value accumulated, loaded in a single MGC, during the contest.</p>

Competitors Gift Cards Features	Dolce Card	MMM MasterCard® Gift Card	Mundicenter Gift Card
<p>Some Communication Strategies used by each Player (Continuation):</p>	<p>No more found.</p>	<p>3. Forum Montijo’s D Day Campaign (26th May 2012) – on 26th of May the costumers were refunded with 20% of the total amount of their purchases. The campaign was only valid for purchases between 100€ and 500€. The refund of the 20% was made in MMM Gift Cards at the Information Desk of Forum Montijo.</p> <p>4. Flight Offers Campaign (Ryanair) – On specific days of March and May of 2012, the costumer that bought a MMM Gift Card, containing a credit with at least of 75€, received an automatic round-trip flight to the main cities of Europe (Rome, Milan, London, Liverpool, Dublin, Barcelona, Madrid, etc.).</p>	<p>3. “27th Birthday of Amoreiras SC” – The costumers who made purchases equal or higher than €100 on the 27th September (Birthday day), were awarded with 27% of the total value of their purchases in MGC card;</p> <p>4. Facebook contest “Life is built on Memories” (15th April to 13rd May): The Amoreiras SC, opened in 1985, was the first big space in the centre of Lisbon for commerce and services. It promoted a contest which aim was to reconstruct its history, based on memories of its visitors. Those interested in participating had to collect important historical events of the shopping and place photos, videos, newspaper articles, party invitations, brochures/catalogues/magazines or statements about Amoreiras in the facebook shopping wall. The winners (one per week during the contest period) were awarded with a MGC of 100€.</p>

Indirect Competition

After the results of the gift voucher penetration's questionnaire (March, 2011), which it will be further exposed, it was concluded (in a sample of 500 individuals) that the more acquired gift cards are from Player 1 and Player 2⁹, both private label purchase cards. The two players present the advantage of the face value inside the card doesn't need to be used all at once, unlike it happens in the Surprise Gift Voucher. Nevertheless, the Surprise gift voucher has the benefit to include these Player 1 and Player 2 and others stores of the shopping centers.

The Player 1 Gift Card is acquired in the stores of Portugal (geographically spread all over the country) and it can only be used in the purchase of goods and services marketed in the physical stores (of Portugal), so it's not valid for purchases online. However, there is a virtual gift card, which is send to the receiver by e-mail, containing a short greeting that can only be used for online purchases at Player1.pt. The gift card is reusable (it can be used more than once), non-rechargeable and the balance remaining (if exist) will not be recovered anytime or after the expiration date. The face values of the card vary from 10€ to 500€ and it's valid for one year. The general conditions of use and the balance or the expiration date of the gift card can be consulted in any Player 1 store or through a Call Center number.

The Player 2 gift card is accepted in more than 1.100 stores geographically dispersed in Portugal and Spain. It can be acquired in a number of stores belonging to the same Group. The gift card can be charged and recharged with any amount ranging from 5€ up to a maximum of 1.000€ and its balance is valid for 12 months from the date of the last recharging. The Player 2 gift card holder has the possibility to register his card in a certain website and block it in case of loss, theft or destruction and also consult the balance and transactions of the gift card.

Because the gift cards of both players are easily sold and have a high net profit margin, they don't need to invest too much on communication and when it's done they use their own stores.

⁹ For confidentiality's reasons will be used encoding Player 1 and Player 2.

4.1.4. Gift Cards/Vouchers Consumer

As it was said in Methodology chapter, for the gift card/voucher consumer analysis it was done a qualitative market research by MID of Sonae Sierra in September 2011. Some of the main conclusions and results removed from the sample are described below.

From the point of view of those who offer, the gift cards/vouchers are seen as an easy solution to acquire, practical and quick - *“We don’t spend too much time and sometime we can give less money and we are sure that the person will like once he himself will choose.”* (sentence collected by a person from the sample) - embracing (for anyone), convenient, safe (the receiver choose his own gift so, there isn’t the danger of a poor selection), flexible (the receiver has time to decide/choose) and economic (we can offer the value one’s want).

On the other hand, from the point of view of those who receive gift cards/vouchers, it may be seen as a laborious and impersonal solution, because the gift-giver is not concerned with the receiver interests – *“...I like to receive, because I have freedom to choose what I like and prefer. But it is not ideal. It takes work and is not specifically for me ... could be for anyone.”* (sentence collected by a person from the sample)

From the consumer perspective, the gift card/voucher’s offer market is organized in 4 categories:

- Experience/Leisure: Odisseias, Vida é Bela and Smartbox¹⁰, etc.
- Useful/Generic: Continente Gift Card, Surprise Gift Voucher, IKEA Gift Card, etc.
- Entertainment/Culture: Fnac Gift Card, Worten Gift Card, etc.
- Shopping/Specific: Zara Gift Card, Mango Gift Card, Sport Zone Gift Card, etc.

The Experience/Leisure category is related with the emotions and special feelings. This kind of offer stand out clearly from the other categories, because we are not offering something physical but an experience, an emotion, an opportunity to realize a wish. Offerings are more expensive, but the perceived value is always higher than what you pay. They are more intimate and personal gifts that show knowledge of the desires and tastes of the receiver. Thus, the specific targets for this kind of offers are closest people or friends from which the gift giver has more information and whose gifts offered have a higher budget. *I have the*

¹⁰ Although Vida é Bela and Smartbox already having suspended their activities in Portugal (in the end of the last year), when the market research was made the brands still were active.

opportunity to give something to the person I know who likes or wants to do, and, that otherwise will not. It's the possibility of offering something special" (sentence collected by a person from the sample).

The Useful category is the maximum exponent of security. These offers are more flexible and the range of products is wide. They are more impersonal offers that involve less knowledge and sometimes, last resort options. The offers are practical and convenient, as they imply the access to dispersed purchase locations accessible to all. Thus, the targets are typically individuals more distant from the gift giver from which he has less information and also the hardest segments (such as children and teenagers). *"As that person is difficult or I don't know very well what I should offer, this kind of stuff is the best, because thus the opportunity of choice is not lacking"* (sentence collected by a person from the sample).

The Entertainment/Culture Category is the replacement of existing offerings such as books or music. It's a group, which is faced with the possibility of offering something related to entertainment, has the guarantee that there are no repetitions. The specific target of this category is usually younger people, teens and men.

Last but not least, the Shopping/Specific Category. This group constitutes the most specific offer which shows some knowledge about the tastes of the receiver. The aim of this type of offer is to ensure a choice that pleases without disappointments. The targets are Men (Sportzone, Decathlon, etc) and Women (Mango, H&M, etc) - *"Offer a piece of clothing to a men or women, is always difficult. It's a kind of gift which the probability of failure is always great. So, offering from a specific store that the person likes it's always easier"* (sentence collected by a person from the sample).

4.1.5. Consumer Behavior Trends

The behavior tendencies' study of the Portuguese Consumer, in the actual crisis scenario, is a key tool to any marketer gain competitive advantage. Examples of consumer behavior during and after crisis in countries such as, United States, Argentina (2001-2002) and Greece were used as an insight basis by C – The Consumer Intelligence Lab (2011) to define the eleven tendencies of the Portuguese consumer. Bellow they are identified some of these trends:

- **Frugality** - The Portuguese Consumer adopts a new attitude: appreciation of what his already have, less consume, less waste, less dependence of material goods and more by

personnel development. The current crisis, the increase of unemployment and the precarious conditions of many workers may lead to great changes in people's life style, mainly among youngsters. People between the age of 20 to 30 show signs of great change in their priorities: more responsible consumption (ethically and environmentally), more awareness, new experiences and travels. The forecast is that consumers start consuming less, trying to justify their purchases, focusing on quality over quantity and rely on the durability of goods avoiding waste.

- **Everyday Life Simplicity** – It consists on the search for simplicity as a new expression of suitability. A quest concerned with time saving, which include all dimensions in an individual life: easiness in performing everyday life tasks, consumption of products and services, work, etc. The consumers have a natural tendency to acquire products that simplify their life, such as, household appliances (e.g. bimby) or storage solutions. They dream with robots which are able to do all domestic tasks, but do not dream with a "real" employee, because they consider that hiring a service that one can do is superfluous consumption or a luxury. Nowadays, it is considered that simplicity is on hold regarding the purchase process. The convenience is paid at a high price and due to the current crisis context there isn't any availability to pay profits of time. Nevertheless, the consumer will continue to accept offers and innovations of products that have a simplification argument, mainly if these innovations are low cost. So, the forecast is that consumers will subscribe to enabler electronic and technological solutions, user-friendly equipments, value a simple and clear communication and value the essential things and solutions that help simplifying the everyday life.

- **Increased Scrutiny = Transparency and Authenticity** - Increasingly informed consumers and evermore involved in the purchase process, ask questions regarding the practices of brands and companies, such as, price, quality, social responsibility, internal employment policies, raw materials origin, etc. The digital world, the web, the networks and the social media enabled a wider exposure of the companies towards their clients. So, they are increasingly exposed to negative comments and continuous requests for information/commentary which demand a prompt answer. The crisis context and the Portuguese disbelief are compelling brands to value coherence, speak truthfully and think over their communication. The consumer will value an honest and direct communication, and also see the "human side" of brands, willing to become an ambassador of a brand/product once he acknowledges its quality, he search for reliable information regarding a

product/service and he will be very sensitive to bad consumption experiences and communication practices which reveal to be unfit.

Strengthening this trend, one of the worldwide tendencies predicted is the "Custowners": consumers become investors, if not shareholders, of the brands they trust. The base of this behaviour lies in the quest of a financial and/or emotional refund. As a result, only the opened, friendly, honest, trustworthy, reliable, transparent and "human" brands will be able to allure "Custowners" (trendwathing.com, September 2012).

- **Discount Society** - According with C-The Consumer Intelligence Lab, *"the consumer will assume the labelled price as a mere reference, convinced that there will be a moment or mechanism in which he will manage to buy products at a lower price"* (C-The Consumer Intelligence Lab, 2011). Most Portuguese are "Bargain Hunter" – good business hunters – because they not only buy cheap, but also search for the right place and time to find the products/services they want at the best price. The consumer recognizes the value of spending time searching for various saving options offered daily by the market. Reinforcing this fact, one of the trends predicted in the world is the bargain hunting as a *"new shopping therapy for many who channel the thrill they used to get from shopping into a quest for bargains"* (Euromonitor International's Report, 2012). The discount coupons and card loyalty/customer benefits are becoming more actively used by Portuguese consumers. There is a growing tendency to join websites like Groupon, Clube Fashion, Goodlife, Letsbonus, among other, which sell products/services coupons with a big discount, during a limited period. Therefore, it is inevitable to say that we are facing an era of discount coupons websites, sales and promotions. Consumers believe that the product they would like to buy will get cheaper even if that means having to wait a long period of time. Retail and brands are facing an even greater challenge: they cannot ignore this consumption trend and must face it as a business opportunity.

The measures announced by Troika and the salary cuts imposed by the Government prolonged until 2013, will imply a decrease in the available family income which will impose a new and different future for the society in general. The Portuguese consumers will face a new reality and the word adjustment will become part of their lives.

This new reality will demand a wider reflection in consumption and a change at all levels in consumers' actions and lifestyles. It is anticipated that the consumption of "overspending" will change into consumption of "back to basics".

In order to keep being competitive and having large productivity profits, brands must regulate and understand all these changes in consumer behaviour.

4.2. Internal Analysis

4.2.1. The Company

SONAE (Sociedade Nacional de Estratificados) was founded in 1959, with just a single business area: the production of decorative laminates. In 1965, Belmiro de Azevedo was hired. He assumed a lifestyle and one entrepreneurial attitude in accordance with the motto "be prepared", which means, to be prepared to decide with little information and little time. For coincidence SONAE has this meaning in Japanese (Fernandes, 2008).

Currently, the company group is present in 41 countries, with more than 40.000 employees and has a businesses' portfolio grouped into six sub-holdings. The core businesses of SONAE Group are the Sonae MC (Food Retail) and Sonae SR (Non-Food Retail); the core partnerships are Sonae Sierra (Shopping Centres) and Sonaecom (Telecommunications, Media and Information Systems and Software); the related business is Sonae RP (Retail Properties) and last business area but not least, the Investment Management within the Active Investment.

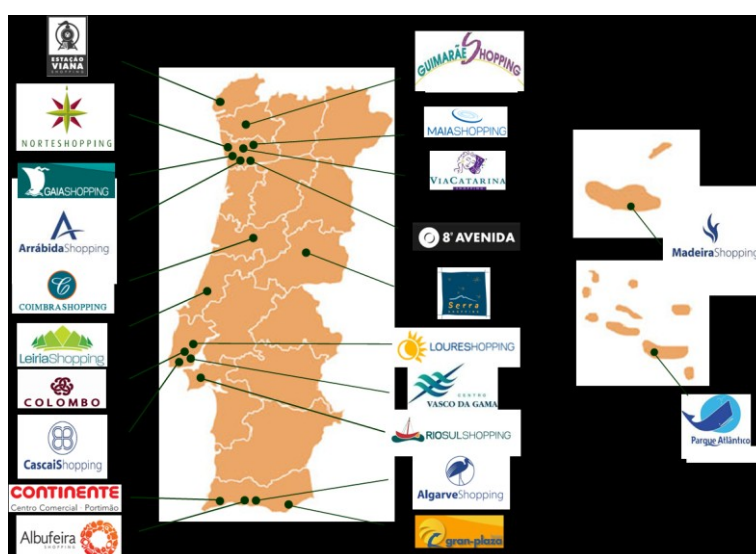
Founded in 1989, Sonae Sierra is owned by Sonae, SGPS (Portugal) with 50% and Grosvenor (United Kingdom) with 50%. In the same year, occurred the opening of the first shopping centers managed by Sonae Sierra: Continente Portimão Shopping Centre and Albufeira Shopping (current naming). The shopping centre business includes the ownership, development and management activities.

Sonae Sierra is owner of 47 Shopping Centres with a total GLA of 2 million m² and it's responsible for the management of more than 70 shopping centers, in eleven countries (Portugal, Spain, Italy, Germany, Greece, Romania, Croatia, Morocco, Algeria, Colombia and Brazil). Sonae Sierra is passionate about bringing innovation and excitement into the shopping and leisure industry. It's specialist in creating unique shopping experiences,

understanding people, delivering the unexpected and making the impossible possible with specialized knowledge and know how. With more than 20 years of experience, Sonae Sierra has won over 100 awards and has been seen as an international benchmarking. In 2012, Sonae Sierra reached a direct result of €62.6 million, an increase of 2% compared to 2011.

In Portugal, with more than 195 million of visits by year, the Sonae Sierra's portfolio has coverage from north to south and in islands (Fig. 2) and it's composed by 22 shopping centers¹¹ and 3 retail parks.

Figure 2 – Coverage from North to South and Islands



Sonae Sierra is responsible for managing and leasing shopping centers with a focus of maximizing their long term value. The core business of the company is the tenant-mix occupancy, but there is also integrated a secondary business area that generates direct incomes to the company: Mall Activation. Mall Activation business area involves the temporary letting spaces (brand activation, sales promotion, exhibitions, events, stands, etc), shop spots (kiosks), media partners, paid services, sponsorships and the Sonae Sierra Gift Voucher business.

4.2.2. Gift Vouchers' Business

The Gift Voucher was introduced in 2007 paper format. In April 2010 the product was segmented in B2B and B2C being named as Prize and Surprise respectively and re-launched. The Gift Vouchers are available at all the 21 shopping centers of Sonae Sierra Portugal

¹¹ Sonae Sierra is not owner of Tavira Gran Plaza, but the management of the shopping centre is 100% made by Sierra.

(Tavira Gran Plaza isn't included) and they can be used in more than 1500 tenants, which means there are some stores that aren't adherent to the Gift Vouchers.

Prize: The Reward¹²

The B2B business model is represented by product Prize (Prize's logo is on Fig. 3) and refers to Sonae Sierra's offer for the corporate market. The Portuguese companies are increasingly recognizing the good performance of their employees and gift vouchers emerged as a response from Sonae Sierra Shopping Centres to this intention that companies have in appreciating the positive performance of their human resources, especially the ones who demonstrate more interest in their duties.

Figure 3 – Prize's Logo



Surprise: The Gift¹³

The B2C business model is represented by product Surprise (Fig. 4), available for purchase to all final customers which are not companies or legal based entities. Giving presents isn't always easy; interests may change and tastes modify with time and states of mind. Therefore, the Sonae Sierra Shopping Centres present an improved reply regarding the customer's doubts: a line of gift vouchers.

Figure 4 – Surprise Gift Voucher



The name "Surprise" refers directly to the intended effect. It is similar to the Portuguese word "Surpresa" (easy to understand), and has the intention of translating feelings such as excitement and unexpectedness. The fresh red color was chosen for the logo (Fig. 5) and represents emotions, symbolizes passion and enthusiasm. However, it also takes some qualities from the colour pink, which refers to something kind, familiar and harmonious. The motto of GVS is "*A good surprise for sure*".

Figure 5 – Surprise's Logo



The sales team of the product is present in all shopping centers, on the Information Desks and Management offices of the shopping centers. The sales team is merely reactive in the presence

¹² <http://www.chequeprendaprize.com/>

¹³ <http://www.chequeprendasurprise.com/>

of the costumers at the point of sale, mainly because the initiative arises from the costumer in the moment he decides to buy the gift voucher.

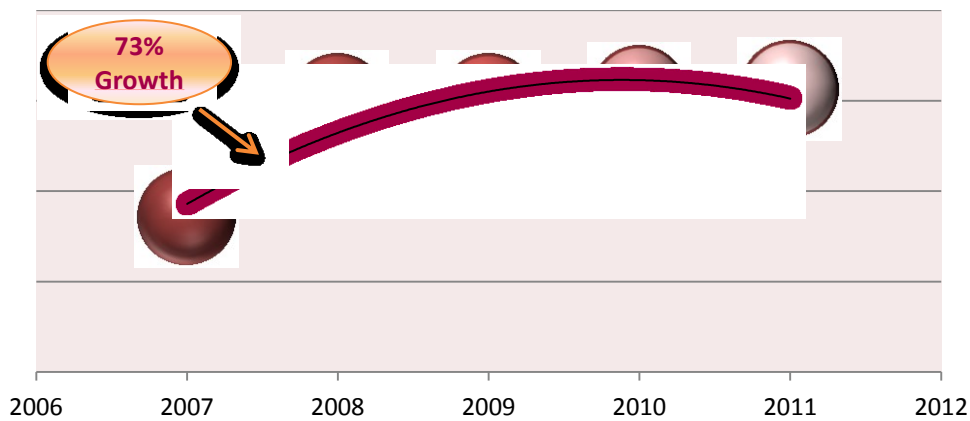
There isn't any possibility of customizing or segmenting the product. The face values of product Surprise are: 10€, 15€, 25€ and 50€.

The SGV website doesn't allow people to register, so there is any database available.

Financial Trends of Gift Vouchers (Prize and Surprise)

Since 2007 the sales amount of Gift Vouchers presented a growth rate, but the sales trend shows that in a close future the sales tend to stagnate. The graphic 2 shown that the sales in 2008 (after the launch year) had a growth rate of 73%, but it is quite visible that in the following years the sales have continued to grow, but with a tendency to stagnate.

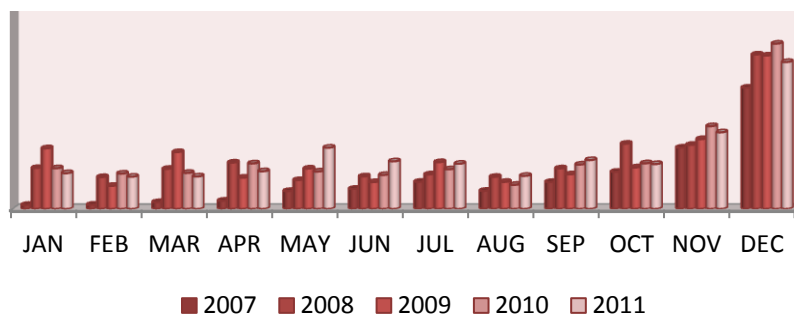
Graphic 2 – Financial Trends of Gift Voucher's Business (2007-2011)



Source: Sonae Sierra

Analyzing the 5 year period of total gift voucher sales from 2007 to 2011 (Graphic 3), it's important to point that their sales are much higher during the Christmas season, especially in December. In 2012, this tendency remained.

Graphic 3 -Total Gift Vouchers' Sales (2007-2011)



Source: Sonae Sierra

4.2.3. Surprise Gift Voucher

Although the problem of seasonality happens in the two business models (B2B and B2C), in the Surprise product this situation is more worrying, because in December month its sales are in over 50% higher than the volume of annual.

The TOP 5 shopping centers, this is, the shopping centers where the sales volume of Surprise gift vouchers are higher are: Colombo, NorteShopping, CascaiShopping, Centro Vasco da Gama and GaiaShopping. These five shopping centers represent almost 90% of the total amount of Surprise sales.

Consumers

The Website doesn't allow people to register, so there is any database available.

Thus, through the qualitative market research accomplished by MID in March (2011), the sample also provided how they evaluate the SGV.

They considered the Surprise as an offer that allow the total choice freedom for who receive it; convenient, avoiding a poor gift selection; reliable, because it has behind the Sonae's brand, which is a Group recognized by the Portuguese market; associated to the purchase of a product's diversity and not related to the basic needs (which are not adequate to the gifts universe).

On the other hand, they also characterize the Surprise has an impersonal gift because if the total choice freedom as a good point, it also can be a disadvantage because it is related to an offer less personal and antiquated, because it still use the paper format, unlike its competitors. The paper format has the disadvantage of to have fixed amount options and just allows one single use, because the stores don't give change.

They even refer that the Surprise is little known and recognized. While competitive products are present physically in stores and have associated communication, the Surprise is only available for those who are looking for it. Thus, it's a product that many people still not properly understand and fear that the receiver does not know what it is, resulting in a gift with less impact.

Penetration

According to a questionnaire made by Market Intelligence Department in March 2011 (Annex 3) to Lisbon and Oporto habitants, in order to understand the Surprise gift voucher penetration, the main conclusions obtained from the sample (n=500) were the following:

- The gift vouchers' penetration rate in the total sample is 28%, which means only 28% of the interviewed people (138), already purchased a gift card/voucher (Annex 3.2);
- The gift voucher with the major penetration, within the 28% of people that already purchased gift cards/vouchers is the Player 1 (54%). There are a lot of references to the Player 2, totalizing 18% of references. From the references made by the interviews, 4% even mentioned the "*NorteShopping Gift Voucher*", instead of Surprise Gift Voucher (Annex 3.3);
- The principal motives leading to the purchase of gift cards/vouchers are Birthdays (54%) and Christmas season (37%) (Annex 3.4);
- Each interviewed client tends to buy gift vouchers one or two times per year (Annex 3.5), being the average amount spent on these gifts vouchers/cards 65€;
- Only 22% of the interviewed people new Surprise gift voucher product (Annex 3.6). Within that those said they didn't know the Surprise gift voucher, the awareness grows for 30%, when the Surprise gift vouchers are related to Sonae Sierra's shopping centers (Annex 3.7).

So, one concluded that the notoriety degree of the SGV is low and the name "Surprise" is still unknown by the most individuals (taking into account the sample).

Other results from the qualitative market research made by MID (September, 2011) also concluded that when people think in gift cards/vouchers, the Player 1 and Player 2 are more in the consumers' top of mind than the SGV.

Communication Strategies

Regarding the communication strategies, in 2011 was launched the Matrioshka campaign (Fig. 6). The concept involved was the surprise effect that, when the Matrioshka (constituted by 6 or 7 dolls) is being opened, it is always surprising. This campaign was transversal along the year (less in Christmas season), this is, it was adapted in all special days such as, Mother's Day, Father's Day, Child's Day, Valentine's Day, etc.

Figure 6 – Matrioshka Campaign (2011)



The purpose of the campaign was boosting the sales, however, the communication using Matrioshka had a low impact and didn't have the effect desired, and the result on the product sales amount was significant. The consumers didn't understand its meaning and didn't associate it to the SGV. Through the qualitative marketing research (September, 2011), the sample evaluate the campaign unclear, because the Matrioshka is associated to a foreign cultural element and also pointed out that the campaign didn't identified immediately the product, which is aggravated with lack of knowledge about it.

So, Sonae Sierra had to change its Gift Vouchers' communication strategy and in the end of 2012, namely in Christmas season, a new campaign was launched and that's still used currently (Fig. 7). The campaign's messages consisted in remember the consumers that there is the possibility to buy the perfect gift when they even know what the receivers want. Through the SGV, the gift buyers can offer what's a specific person really desire, giving to them the opportunity to buy what he/she most like, because sometimes the tastes of the gift givers are not equal to the gift receivers or the gift voucher buyer even has pleasure in to offer a SGV, because he want to offer a shopping experience or to be remember by the gift receiver when look to the gift that himself/herself choose. The communication channels used (like was used in Matrioshka campaign) was banners, stand-ups and traditional mupis using a consistent message: *"The perfume that Joana always wanted"*; *"The watch that Peter always wanted"* and *"The game that Andrew always wanted"*.

Figure 7 – Currently SGV Campaign



It's important to refer that this two campaigns (2011 and 2012) were communicated just indoor, which means only inside of all Sonae Sierra's shopping centers.

In the Christmas season of 2011 were still made some brand activations in the TOP 5

Figure 8 – Christmas Action



shopping centers. In all weekends before 24th December, a girl wrapped like a gift (Fig. 8), walked on the shopping centers' main aisles talking with clients, giving them balloons and flyers, containing information for people go to the information desk (the gift voucher's point of sale) and ask for his/her gift. It was also given balloons and flyers to the children who took photos with Santa Claus.

In Christmas time of 2012, the communications channel used were the same, but it was added the digital mupis of JCDecaux (Sonae Sierra Media Partner) in which a short promotional video was displayed (without sound) among other promotional videos from other brands. Outside the digital mupis were hanging two boards in PVC (one on top and another on the bottom) with the format of the Surprise logo with the message: *“Do you want to hit on your gift?”*.

4.3. SWOT Analysis of Surprise Gift Voucher

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> - Brand Features - Convenient - Reliable: Sonae's Umbrella - Total Choice Freedom - Associated to a products' diversity: usable in more than 1500 stores of Sonae Sierra's shopping centers - Not related to the first needs 	<ul style="list-style-type: none"> - No database - Available only for those who are looking for it - Product Tipology: Old fashion (paper/voucher) - Fixed amount options - One single use per voucher - Unknown: low brand awareness - Low product communication - Product Seasonality (Christmas)
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> - Gift Card/Vouchers Market: Pratical, quick and security options - Internet, social networks, “mobile moments” - New patterns of consumption - Everyday Life Simplicity: value time saving concerning the consumptions of products - Value a simple, honest and clear communication - Social responsibility - Society discount: “Burgain Hunter” – era of discounts, sales and promotions. 	<ul style="list-style-type: none"> - Inserted on the useful category The new legislation: if approved, the impact on sales result will be negative - Macro-Economic Context (Crisis) - Decline of customer' purchase power - Frugality (less consumption and more experiences) - Digital world - may have a huge impact when something goes wrong or a consumer have a bad experience with the product - Product category: generic - Dynamic competitors on the market: all players have gift cards

5. COMMUNICATION PLAN TO SURPRISE GIFT CARD

In order to increase the sales growth rate of the business, a product development has been considered as a key action. Considering all the information previously presented, an upgrade is needed, principally in what refers to the features of the product: the replacement of the voucher format by a card format.

5.1. Surprise Gift Card¹⁴

The Surprise Gift Card (SGC) – Fig. 9 - will be an open loop card, no rechargeable, no nominative and issued by BES, SA (Espírito Santo Bank). It can be used at any store of Sonae Sierra's shopping centers portfolio and anywhere, since the Visa Electron network is accepted. The point of sales will be the information desks of the shopping centers (the online sale will be available in the future, but not in this launching phase). The SGC will have a tax activation cost of 1, 50€ and it can be loaded from 10€ until 250€.

Figure 9 – Surprise Gift Card (Image Predicted)



An advantage of this gift card regarding the competitors of the same type (Dolce Card and MMM MasterCard® Gift Card) is that it comes with a PIN code. Thus, the SGC holder has the possibility to utilize the ATM's machines for different operations, such as: check the balance, change the PIN code, payments for services and to the State, phone cards charging and purchase tickets. The balance can also be consulted through the SGC website (which will have a link directly to the card account of BES) and the enroll on the website should be strongly recommended for security reasons, to the gift card buyer or to the gift card user because, if the gift card is lost or stolen, it will automatically be cancelled and issued a new gift card, with the face value contained on its registration. In a discrete manner it will be

¹⁴ Currently the SGC is under development, therefore, it can be suffer changes regarding their features until its launch.

created a database that will allow sending newsletters to all the holders registered on the website.

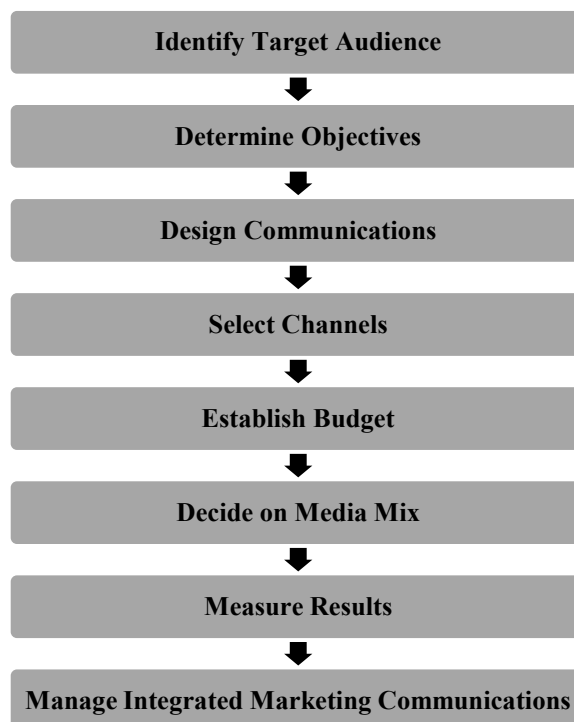
The SGC doesn't allow online purchases because the main objective is that, the customers redeemed the gift card at the Sonae Sierra's shopping centers and not in any other place (although it is possible). Its validity will be one year. The package design isn't yet defined but, in principle, there will be two type of package: a simple package with no extra cost and a premium package, more qualitative and with a space to write a message/dedication.

5.2. Communication Plan Framework

The communication plan presented is based on all the information analysis previously collected and it will give a suggestion for the communication plan to the SGC. Its launching is expected for September 2013 but, as stated before, the product continues under development and therefore its features, as well as, the launch date predicted, can be changed. However, the budget was established by the Mall Activation Department.

According to Kotler and Keller (2009) in the book "Marketing Management, for the developing of an effective communication plan, a set of steps should be followed. For the present communication plan, the steps (Fig. 10) were used aiming to make it clearer and more understandable.

Figure 10 – Steps in Developing Effective Communications



5.2.1. Identify Target Audience

The segmentation criteria to identify the target audience were based on Geographic, Demographic, Psychographic and Behavioral variables and each variable was composed by different sub-criteria (Annex 4). These sub-criteria were based on the consumer profile of the Sonae Sierra's shopping centers (Annex 5.1) and in the consumer profile of the Top 5 shopping centers (Annex 5.2) because, as it was referred previously, the total amount of Surprise sales almost represent 90% of these, based on the gift cards/vouchers consumers' behavior, attitudes and opinions analysis toward the gift cards/vouchers. Thus, the target audience defined for the communication plan was the follow:

- People of male and female gender with ages between 25 and 44 years old, belonging to the upper middle and middle class, who lived in Urban regions of Mainland Portugal, namely in Greater Lisbon Area and Greater Porto Area;
- Regular and occasional buyers of SGV, in order to keep its loyalty to the new product and increase the number of SGC buyers, respectively;
- Men and Women with an active lifestyle, that frequent Sonae Sierra's Shopping Centers;
- Men and Women who don't know the Surprise Gift Voucher;
- Convenience shoppers, interested on the product (who value the time saving, security, easy and practical solutions) and buyers that acquire the gift card product as the last resort option;
- Men and Women who are looking for a gift or the perfect gift, who didn't know what to offer and enjoy giving and receiving gift cards.

5.2.2. Determine Objectives

Through the analysis of the gift vouchers business' financial trends it was perceived that, despite of the sales amount represents a growth rate since 2007, the sales trend reveal that in a close future they have a tendency to stagnate. Other situation provided by the analysis, revealed that the sales volume is higher during the Christmas season, namely in December. Regarding the Surprise product this situation is more worrying because, in December, its sales are over 50% higher than the volume of the annual sales.

Through the analysis, was also concluded that the awareness of the Surprise Gift Voucher is lower in comparison with other market players, which are more in customers' top of mind.

After the deep analysis of the Gift Vouchers business, Sonae Sierra realized that it was necessary to proceed to the replacement of the present voucher format by the gift card format and then, briefly, the Surprise Gift Card will be launched.

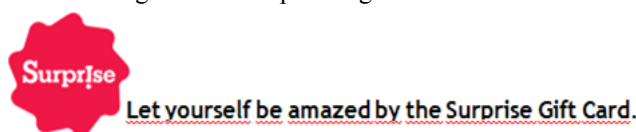
Thus, the present communication plan to the Sonae Sierra's Surprise Gift Card has two main objectives:

- Increase the Surprise brand awareness;
- Increase the brand purchase intention (raising significantly the sales growth across the year, overcoming the problem of seasonality).

5.2.3. Design Communications

The motto of Surprise Gift Card will be: *“Let yourself be amazed by the Surprise Gift Card”* and it will be always accomplished by the Surprise logo in any communication design (Fig. 11).

Figure 11 – Surprise logo and its motto



There will be created the Surprise Mascot (Fig. 12). The Mascot will be dressed with the Surprise logo and not with the Gift Card, because it's important to build brand knowledge, especially brand image on consumers' mind in order to increase the Surprise brand awareness that currently, is low. The Surprise Mascot will have an active presence in some events and activities aimed to people more and more associated the Surprise brand to the Gift Card.

Figure 12 – Surprise Mascot



There will be produced two mascots: one to use on Greater Lisbon and other for the Greater Oporto.

Surprise Gift Card's Launch

To the SGC's launch will be development several actions aiming to introduce the new product on the market.

Launching Event

It will be composed by a teaser and an event in the Colombo Center. The Colombo will be the shopping center selected to the event because it's the shopping center of the portfolio with the best performance in terms of visitor traffic (around 23 million per year), stores typology and diversity and selected by the costumers as "the one that has everything".

Figure 13 – Event's Layout



One week before the launch day, there will be made a teaser, exposing a carpet with the Surprise logo and a big box wrapped (Fig. 13) on the Central Square (the big square that's used for the most events). From Central Square's cupula will have hung big balls. Close to the space it will be placed information to those who approach it or are curious to know what will happen there. The information will be written as follows: "*Do you want to be surprised? Appear in the next Saturday at 3:00 p.m. and let yourself be amazed!*".

At lunch time of the launching day (1:00 to 3:00 p.m.) the Surprise Mascot will deliver flyers to the customers walking on the shopping center. In the flyers will be written "*Do you want to be surprised? Go to the Central Square at 3.00 pm and let yourself be amazed!*". By 3.00 p.m. the Central Square is expected to be crowded and the event starts. A music is placed and the gift cover is being open by a winch (that the Central Square already have) and then start to come out various objects (made in card) from inside the gift box as pair of shoes, a t-shirt, a clock, a book, a perfume, a show ticket, a necklace, a mobile phone, a playstation game, a mirror home, a baby trolley and many others (the idea is to come out with the various objects that any store inside of the shopping center offers). The space will be adequately sealed, so that the objects do not injure people. After coming out several objects, a girl appear with a big SGC in her hands (with a big smile) and with the music as background someone starts to talk, saying "*Do you want to be surprised? Let yourself be amazed by the Surprise Gift Card, the card that allows you to offer and obtain everything you wish.*". Immediately afterwards, the big balls on the cupula burst and release a lot of balloons with a normal size, ending the event. Inside of these balloons there will be vouchers (one for balloon) with the gift card size. In front of them will be the SGC image and behind it will be described its features and written the follow: "*Do you want to win a Surprise? Go the information desk and ask for your Surprise!*". The surprise will be a SGC with a face value of 10€.

The purpose of the SGC, being the last one to appear is to pass the message that it is the perfect gift because it allows offering any object that come out from the gift box. The customers' visits should also perceive that, with the SGC they have the possibility to offer/acquire whatever the gift receiver/themselves wishes/wish.

Advertising

In order to avoid that the target audience decodes the wrong message and associate the Surprise to a “more one loyalty card” or a “credit card”, there will be created a strong advertising (example on Fig. 14). Thus, for the customers clearly understand that the Surprise is a gift card, the advertising phrases will be the following:

Figure 14 – Artwork Example



- “Don't you have time to buy the perfect gift? The Surprise Gift Card gives you time”.

- “Are you afraid to buy the wrong gift? The Surprise Gift Card takes away your afraid”.

- “Are you undecided on the gift? The Surprise Gift Card helps you to decide”.

- “Buy a gift is a boring task for you? The Surprise Gift Card makes it easier”.

- “Your friends never hit in your gift? Ask them to offer you a Surprise Gift Card”.

The ads image should be clean, premium and not confuse, containing all the relevant and necessary information. The QR code on the top is for the most curious and mobile lovers to access the application, which is going directly to the website of SGC¹⁵.

These ads will be distributed inside the Sonae Sierra's shopping centers after the day of the launch event, through different communication media.

¹⁵ Suggestion: It will be interesting the QR code application was redirected to a video standard explaining the SGC product, even if it is inserted on the website.

Brand Activation

In the shopping centers of the Greater Lisbon and Greater Oporto (which include the Top 5 shopping centers and also the LoureShopping, 8ª Avenida, ArrábidaShopping, Via Catarina and RioSulShopping), the Surprise Mascot will distribute mini envelopes with the gift card size (Fig. 15). Inside the envelopes there will be the same cards that were inside the balloons in the launch event (a voucher to pick up a SGC with a face value of 10€).

Figure 15 – Mini Envelopes



Christmas

The Christmas is the selling peak, so the investment on communication doesn't need to be very high. Although, in Christmas the shopping centers are very crowded, there is always entertainment activities related to the Santa Claus (realized by the Marketing Department) and, therefore, to invest on a brand activation will have less impact and can create some mass.

Therefore, it will just be made a special Christmas ads (Fig. 16) to remember the SGC as a gift option, if not the perfect option, with the following phrases: “*This Christmas, fill your tree of surprises with the Surprise Gift Card!*” (being its image associated to a tree fulfilled with the SGC) and “*Surprise Gift Card, the Santa Claus’ best friend*” (with the Santa Claus image looking and smiling to the customers, holding a SGC).

Figure 16 – Christmas’ Artwork Example



Automobile’s Prize Draw

January is the sales season and, in the last years, the footfall indicators of Sonae Sierra shown that there isn't much difference to the Christmas time in relation to the visitor traffic. Thus, during a week, in two shopping centers of the TOP 5 - Vasco da Gama Center and GaiaShopping (localized in Lisbon and Oporto, respectively) – it will be launched a prize draw where the automobile SEAT Mii Style (RRP: 10.999,00€) is being drafted.

Although the automobiles will only be exposed in these two shopping centers, everybody can participate, not only the customers of Vasco da Gama and GaiaShopping, because the prize draw will be communicated for the whole Sonae Sierra's portfolio. To participate, they only

need to acquire a SGC with the minimum amount of 10€ at the information desk of any Sonae Sierra's shopping center and register on the SGC website or do login, if they already are registered and insert a code that the salesperson of the information desk, will give them to enroll in the prize draw. The person has the possibility to make it immediately, through a computer that will be available at the information desk. The two winners will be announced by the Surprise Mascot in the last day of the prize draw, around 7.00 p.m, in each shopping center. For the prize draw has more success, every single day, once per hour the salesperson that is at the information desk of Vasco da Gama and GaiaShopping, through a microphone (which will achieve as much clients as the ones that are walking on the mall) will remember that the prize draw is ongoing, saying something like: *“Do you like to win a SEAT Mii Style? It's easy, go to the information desk and I tell you how to win!”*.

The prize draw will be based on a partnership with the SEAT Company. Seat uses to work with Mall Activation Department namely, in the mall letting spaces, in Sonae Sierra's shopping centers to make car exhibitions. The mall letting spaces have a cost, but with this partnership the space will be offered during a week in each shopping center and, in return, Mall Activation has a good discount in the purchase of the two cars, like around 30%. The Colombo Center and NorteShopping won't be the selected shopping centers, because they are the premium shopping centers of the whole portfolio. Consequently, due to the fact that they are the most required by the costumers, the Mall Activation can't compromise business opportunities in the mall letting spaces. Thus, it was choosen Vasco da Gama and GaiaShopping to do the prize draw in order to reach the customers of the Greater Lisbon and Greater Oporto. Once CascaiShopping is near to Vasco da Gama it doesn't make sense to do it there.

During the contest, the SEAT Mii Style will be exhibited in one of the most visible places inside the mall with SEAT promoter(s) standing up (two-sided) announcing the prize draw: *“Would you like to win a SEAT Mii Style? With the Surprise Gift Card it's very easy!”*. In Figure 17 there's an example of layout. If there is available space and SEAT is willing to that, it can invest in a bigger exhibition with entertainment actions and other automobile models, but has to highlight the SEAT Mii Style.

Figure 17 – Layout Example



This communication strategy will be a win-win partnership, because Sonae Sierra is aiming to increase the SGC sales creating a buzz campaign. SEAT will have the opportunity to promote its Mii Style automobile model and sell two of them at least. Sonae Sierra will also try to increase the number of visits, because if the participant has curiosity in knowing if he/she was the winner of the Mii Style, they will return to the shopping center.

This communication strategy will be a win-win partnership, because Sonae Sierra aiming to increase the SGC sales and to create a buzz campaign, while SEAT will have the opportunity to promote its Mii Style automobile model and sell two of them at least. Sonae Sierra also will try to increase the number of visits, because if the participant had curiosity in to know if he/she was the winner of the Mii Style, they will come back to the shopping center.

Valentine's Day

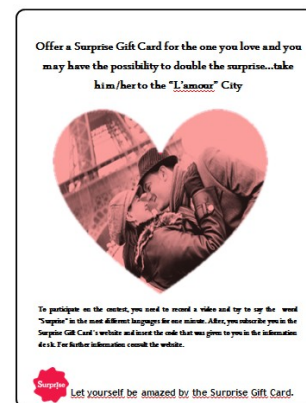
This communication design will consist in the launch of a contest to the Valentine's Day aiming to incentive the customer to buy a SGC for the his/her love, providing the possibility to make him/her a double surprise, being one of them the SGC and the other a trip to the L'amour City (Paris) for both: *"Offer a Surprise Gift Card for the one you love and you may have the possibility to double the surprise...take him/her to the "L'amour" City"*. The Figure 18 is an artwork example for the contest.

It will be drafted 5 trips for who can say more times the word "Surprise" in different languages for a minute. The individuals interested to participate on the contest should go to the SGC website and insert the code that was given to him/her in the SGC purchase and send a video with his/her performance.

The contest will be launched a week before the Valentine's Day to the whole portfolio of Sonae Sierra and in the Valentine's Day will be announced the winner.

This communication design is clearly a way to induce sales, creating some enthusiasm to the contest's participants.

Figure 18 – Valentines' Day Artwork



Women's Day

During the woman's day, the Surprise Mascot will distribute reusable bags personalized by the Surprise logo that, when closed has a shape of a rose (Fig. 19). In the clinging to the "stems" of the rose there will be a paper with the shape of the gift card. The front of the flyer will have the gift card image and in the back there will be described its features. The Surprise Mascot's role is to approach a woman and create a short dialogue like:

Figure 19 – Rose-Bag



Surprise Mascot - "Hello! I'am Surprise! What's your name?"

The woman - "Sarah" (for example)

Surprise Mascot - "Do you know who am I?"

Sarah - "Yes, I know."

Surprise Mascot - "Good! Sarah, because it's woman's day, your day, I want to give you a little gift - offers the "rose" and continues talking - "Well Sarah, I hope you have enjoyed it. Now I have to go to surprise another lady. Have a nice day!"

If Sarah answers that she doesn't know who Surprise is, the dialogue continues this way:

Surprise Mascot - "I'm Surprise, the brand of the Gift Card that can be used in any store of the Sonae Sierra's shopping centers. Are you already recognizing me?"

Sarah - "Oh, yes!" / "No..."

Surprise Mascot - "Good!" / "No problem, now you already know me!"

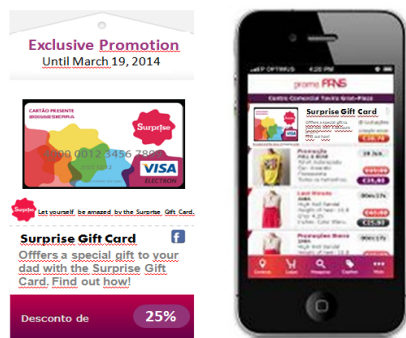
Surprise Mascot: Sarah, because it's woman's day, your day, I want give you a little gift - offers the "rose" and continues talking - "Well Sarah, I hope you have enjoyed it. Now I have to go to surprise another lady. Have a nice day!"

PromoFans Promotion Platform

For the commemoration of these days it will be made a specific promotion to the ten shopping centers inserted in the PromoFans' promotion platform (shopping centers of Greater Oporto and Greater Lisbon). The promotion will consist in offering a discount of 25% in a gift equal or superior to 20€, since the payment mean is made through the SGC together with the PromoFans coupon presentation. It will start three weeks before each special day (19th March

and 1st Sunday of May). Like it happens with all the promotions inserted on the PromoFans' platform, for the customers to get the promotion discount they just need to access to PromoFans Website or through the free mobile application available for iPhone or Android (available in AppStore and Google Play), choose the SGC promotion and print the coupon or

Figure 20 – PromoFans Promotion



present the virtual coupon through his/her smartphone. The customers also may print the coupon at the information desk of each shopping center. Therefore, the customer can acquire the SGC and the PromoFans coupon at the same time. In the Figure 20 there's how the promotion appears on the PromoFans website and in the mobile application together with the phrase: *“Offer a special gift to your dad/mum with the Surprise Gift Card. Find out how!”*.

The promotion background will be based on a partnership with the stores that want to participate. To join, they just have to be willing to offer a discount of 25% for who presents the SGC and the PromoFans voucher (printed or virtual). The participants stores list will be available for the clients in the PromoFans website and in SGC website.

This promotion is aiming to induce sales and provide the purchase of a special gift to his/her father/mother through the SGC. Moreover, there may be customers who end up buying a SGC because they consider it the best gift option to offer. In addition, Sonae Sierra may promote two of its umbrella brands, PromoFans and Surprise, with this communication design.

“Surprise Eggs Hunter”

The “Surprise Eggs Hunter” is a game for kids aged between 5 and 12 years old and its purpose is to find chocolate eggs hidden around the center. The three kids that found the major number of eggs will receive a surprise that only will be revealed in the end of the hunter. The surprise will be a SGC with a face value of 50€ for each winner.

The game will be realized in the Top 5 shopping centers and also in LoureShopping and RioSulShopping because in the Sonae Sierra portfolio they are inserted on the family cluster, therefore it makes sense to include them in this communication design.

Realized on a Saturday morning, before the Easter Day, the children participating on the game will be split by the promoters. If the number of kids is lower than it was expected, before the games' begin, the promoters should walk inside the mall inviting the children to participate on the game. The parents can follow/monitor their children, if they want, or take a walk by the mall and come back in the end of the game. For security reasons the vigilance will be reinforced during the game and will be monitored by the promoters. Additionally, each children will be identified, with a kind of ribbon in turn of their necks with the logo of Surprise hanging and in the back of the logo there will be his/her name, parents name and phone number.

The game will have the duration of 1:30h and will finish only when all parents are present and the three winning kids will be announced. Before that, one of the promoters will say that each kid can stay with the chocolate eggs found and can only reveal what the surprise is by the end. His/Her role is to say that each winner will win a SGC with a face value of 50€ and explain to the children (indirectly to the parents) that with that card they can buy whatever he/she want until 50€ in any store of the shopping center, mentioning a lot of examples, like buying a video game, a toy, a doll, clothes, tennis, going to lunch with his/her parents, eating his/her favorite food, going to the cinema (adding something like “if your parents agree, of course!” , smiling while talking) and many other things. To the other kids, there will be delivered candies with the Surprise logo (Fig. 21).

The promoters should be dressed with jeans and a white t-shirt with a big egg stamped with the Surprise logos, like displayed in Figure 22.

Figure 21– Candy Example



Figure 22 – Promoters T-shirts



The “Surprise Eggs Hunter” will create entertainment in the Easter season inside the shopping centers, offering an activity which can involve parent’s children, if they want to monitor them. Its action aiming to mainly give visibility to the brand, and indirectly or in a soft way, achieve the target audience through the kids. When the game is promoting on the different communication media, the image of the “Surprise egg” should be highlighted.

“Helping Hands Wall”

The “Helping Hands Wall” will consist in a social responsibility event to help a private institution of social solidarity, the Acreditar: Association of Parents and Friends of Children with Cancer.

The event will occur in Colombo Center, during 10 days previous to the Children’s Day, during two weekends, in which it will be exposed closed to the information desk of the shopping center (SGC point of sale), a big wall with the title “Helping Hands Wall”. In the side of the wall there will be a LCD (lent by a brand that can be interested in promoting its brand and be associated to this cause, like Samsung, Sony, etc) passing a video touching people’s feelings in which Acreditar’s children participate.

To the people participating in this cause, they only need to acquire a SGC with a minimum amount of 10€ and take a photo of his/her hand. From the total sales amount of SGC, 15% will be donated to Acreditar. Thus, as greater the number of SGC acquired is, the greater will be the sum donated to Acreditar.

Figure 23 – Layout Example



After buying the SGC, the customer will be invited by a promoter to take a photo of his/her hand through a Polaroid machine to be posted on a big wall. Lastly, the promoter will take a photo to the wall with a mobile phone and ask permission to his/her for sharing the photo on his/her Facebook wall, with a message like

“Thanks (name of the person) for your participation on “Helping Hands Wall” ” (through the Acreditar Facebook Page). In the figure 23 there’s a layout to better understand the idea. The promoter’s role will also be to approach the customers that pass by the big wall and invite them to participate on the “Helping Hands Wall”.

The video idea with Acreditar’s children is to create a viral campaign on social networks like Facebook and Youtube. It can be, for instance, begin with healthy children, running happy, playing and making simple things of their everyday life; then the scenario changes and kids of Acreditar appear, without hair, saying: “*Do you believe in surprises?*”; and the other one appear and answer “*I believe!*” and both kids turn to the camera and say: “*If you want be a helping hand, buy a Surprise Gift Card and fill our lives of surprises*”. The scenario change again and it will appear the ill children of Acreditar holding a huge SGC in front of the

Acreditar's house. By the end it will appear in the middle of the Surprise logo a circle formed by hands. The video will also explain the action's context.

Finally, in the end of the action, in Acreditar Facebook page will be posted the big wall with the total of the "helping hands" and tagged the people who have participated. To enhance the social responsibility activity, an ambassador will be invited in the first weekend, and the Surprise Mascot should also be present to create more impact.

The purpose of this campaign will be to sensitize and make the population aware of the problems of some children in Portugal and also to create some brand reputation and company's goodwill, but mainly to increase further brand notoriety

Holiday Season

Approaching the holiday season, it will be created a partnership with the travel agencies' stores of each shopping center. Despite of some customers have started to book their holidays in advance, there will always exist the "bargain hunters" who believe that they will have the possibility to acquire the product/service that they wish at the best price.

Thus, the holiday season communication design will consist in 25% of discount over the price that the customer spends on the travel agency: *"Check your holidays in one of our travel agency and enjoy 25% of the value in Surprise Gift Card"* (Artwork example in Fig. 24). The value will be refunded in the SGC.

Figure 24 – Holiday Ad Example



Behind this promotion, the travel agencies need to be willing to make the price discount and in turn, Sonae Sierra will make the campaign communication. The ad image will highlight the SGC and will contain the travel agencies' logo that wanted to participate.

How much customers adhere to the campaign, more SGC will be purchased by the travel agencies and the Surprise's sales increase.

5.2.4. Select Channels, Establish Budget and Decide on Media Mix

For the communications design there will be used personal and non personal channels, aiming to reach the target audience in different, efficient and effective manners.

The Sonae Sierra’s shopping centers generate more than 195 million visits per year, and therefore, in agreement with the Mall Activation Department, the customers to reach are already inside the shopping centers. Thus, due to budget restrictions, it’s more important to make use of non personal communication channels just inside the shopping centers. Therefore, the channels used for the Advertising, Sales Promotion and Events and Experiences tools will have a key performance in the communication plan.

Regarding the personal channels, the Direct Marketing and the Interactive Marketing channels will have an important role in the communication plan, because they will be the ones that will mainly communicate directly to the target audience outside the shopping centers through newsletters and the SGC website, respectively. The Personal Selling channels will be also very significant, because they will involve the salespeople at the information desks, who have to convince or persuade the gift card buyer to pass the message to the gift card user about the importance of the registration, due to security reasons, in the SGG Website.

For the gift card launching and its communication during one year, there was allocated a budget of 200.000,00€, since September 2013 to August 2014.

Following, it was evaluated the costs and advantages of each communication channel. Through this evaluation, there will be selected the tools that allow to maximize the effectiveness of the communication plan. The table 2 shows the budget discriminated by each communication design¹⁶ and the Table 3 (next page) provides an overview of the communication mix’s tools used in each communication design, as well as, its respective channels.

Table 2 – Budget by Communication Design

	BUDGET BY COMMUNICATION DESIGN
Gift Card’s Launching	67.500,00 €
Christmas	25.250,00 €
Automobile’s Prize Draw	31.000,00 €
Valentine’s Day	19.900,00 €
PromoFans Promotion	17.000,00 €
Brand Activation	2.650,00 €
“Surprise Eggs Hunter”	6.400,00 €
“Helping Hands Wall”	11.300,00 €
Holiday Season	19.000,00 €
TOTAL	200.000,00 €

¹⁶ The budget was made with the aid of Sonae Sierra Company.

Table 3 – Media (tools) and Channels of Communication Mix

	Advertising	Sales Promotion	Events and Experiences	Public Relations and Publicity	Direct Marketing	Interactive Marketing	WOM	Personal Selling
Gift Card's Launching	Stand Ups Digital Mupis QRCode Flyers Elevators Food Court Tables		Day Event Launch Surprise Mascot	Press Release		SGC Website	Buzz	Information Desk's Salesperson
Christmas	Stand Ups Digital Mupis				SGC Newsletter	SGC Website		Information Desk's Salesperson
Automobile's Prize Draw	Stand Ups Digital Mupis	Prize Draw	Surprise Mascot		SGC Newsletter	SGC Website	Buzz	Stand Information Desk's Salesperson
Valentine's Day	Stand Ups Digital Mupis	Contest			SGC Newsletter	SGC Website		Information Desk's Salesperson
Women's Day	Bags Flyers		Surprise Mascot				Buzz	
PromoFans Promotion	Digital Mupis	Coupons			SGC Newsletter PromoFans Newsletter	SGC and PromoFans Website PromoFans Facebook Page		Information Desk's Salesperson
"Surprise Eggs Hunter"	Stand Ups Candies		Entertainment Game		SGC Newsletter	SGC Website		
"Helping Hands Wall"	Stand Ups		Surprise Mascot	Social Responsibility Activity - Donation	SGC Newsletter	SGC Website Acreditar's Facebook Page Youtube (Video)	Buzz Viral (Social Networks)	Stand Information Desk's Salesperson
Holiday Season	Stand Ups Food Court Tables	Cross- Promotion			SGC Newsletter SGC Newsletter	SGC Website		Information Desk's Salesperson

The advertising tool will be use for the whole Sonae Sierra's portfolio in the SGC' launch, Christmas, Automobile's Prize Draw, Valentines' Day and Holiday Season communication designs and it will be use just in the shopping centers of Greater Lisbon and Greater Oporto (Top 5 and LoureShopping, RioSulShopping, ArrábidaShopping, 8^a Avenida and Via Catarina) in the PromoFans Promotion. The "Surprise Eggs Hunter" will be advertised in the places where the entertainment game will occur, as well as, the "Helping Hands Wall". The SGC website and the newsletter channel will communicate all the communications designs independent of the place that they will happen.

5.2.5. Measure Results

After the implementation of the communication plan, it's important to measure the impact of each communication design on the target audience.

The **Advertising** is the mode of communication mix that is common to all communication designs. Based on the literature review, the advertising is a hard tool regarding the evaluation of results, because it doesn't provide direct feedback, therefore, there is no mechanism that allows measuring how many people saw the advertisings channels (stand'up, elevators, QR Code, food court tables, digital mupis, flyers). Concerning the **Interactive Marketing**, namely the website channel, it is also common to all communications designs and will be measured through the quantification of visits' number and trough the new registrations on it during the period of each communication design, allowing comparing what was the campaign more profitable. The **Direct Maketing**, specifically the direct mail (newsletter) can be very useful reaching the customers at the right time, allowing the measuring its results in the communications designs that require their enrollment. The **Personal Selling** mode of communication, in particular the salespeople, who have the major responsibility in the increase of the database, it will be also measured trough the number of registration on the website after each communication design occurred.

Beyond what was referred previously, the measures to evaluate each communication design are as follows:

SGC's Launching – The results of the buzz created in the week before the launch, as well as, the involvement of the Surprise Mascot before the event starts, it will be

measured through the estimation of the number of people that will appear in the event's moment. Although, it will be consulted the footfall data of Colombo Center, in order to check if the number of visitors had a big discrepancy in comparison to other Saturday in the same month. The press release will be measured by the number of exposures carried out by the media.

Christmas – Once the Christmas communication design will be composed only by advertising, it just can be measured through the quantity of SGC were sold and comparing this result with the homolog period.

Automobile's Prize Draw – This communication design will be measured through the number of customers participate on the prize draw. Probably the Seat will use their own communication tools (like PR Agency, Facebook Page, website, etc) and it will be asked the results of their communication channels.

Valentine's Day – The Valentine's Day's contest, will be measured through the number of customers that participate on the same, as well as, through the sales analysis on that period, because could exist people that, due to the advertising, decided simply to offer a gift card to their loves but didn't want participate on the contest.

Women's Day – There is no quantitative measuring tool that can provide the impact of the communication design in women's day.

PromoFans Promotion – The special promotion created to the father and mother's day will be measured through the number of clients who participated on the same, through the PromoFans website. However, it isn't a measuring tool 100% secure, because the customers that adhere to the promotion, receive the coupon in their e-mail, but doesn't mean that they print and used it. So, to measure exactly the results of this communication design it will be need to ask to the stores' partners how many customer adhered to the promotion. Crossing these responses with the total sales amount in that period it will be the best way to measure the promotion's impact. Moreover, it will be measure the quantity of comments and likes made on the post of the PromoFans Facebook page's wall.

"Surprise Eggs Hunter" – To measure the game related to the Easter Season it will be collected the number of children that participate on the entertainment action in each shopping center.

“Helping Hands Wall” – The social responsibility event will be measured by the number of “hands” that wanted contribute to the social cause; through the likes and comments made in Acreditar’s Facebook page and through the Youtube video, which offer a measuring tool where it’s possible to know how many times the video was seen by the internet users and the number of comments that it has.

Holiday Season – The promotion of holiday season will be measured by the total of SGC that were “offer” (paid by the travel agency) to the customers upon the presentation of the invoice with the total amount spent on the travel agency. How much the total spent in the travel agencies, bigger the discount, and more SGC will be “offered” to the customers, because the discount value can overcome the 250€, the maximum value that a SGC can be redeemed.

After each communication design occurred, it will be very important to do a sales analysis of each period comparing them to the homolog period. Through that analysis it will be perceived if the communication plan’s objective concerning the increase of brand purchase intention was achieved.

When the implementation of the communication plan is concluded (August 2014), it will be made a survey in order to perceive what’s the notoriety degree of the Surprise brand and the Surprise product and, as consequence, to find out if the communication plan reached its objective, regarding the increase of the brand awareness.

5.2.6. Manage Integrated Marketing Communications

The IMC (the combination of the communication mix's elements), among many others similar definitions, could lead to reach the “*right customers, with the right messages at the right time and the right place*” (Schultz *et al.*, 2003 and Schultz *et al.*, 1992 quoted by Kotler *et al.*, 2009:533). Through the example of the Automobile’s Prize Draw, will be the following explanation on how the marketing communications are integrated in this communication design.

Using the Prize Draw as a Sales Promotion channel with just one stand (Personal Selling) without communicating its existence, the impact of this tool can be lower if it won’t make use of Advertising. For example, the stand ups will be put in shopping center entrances, at the end and beginning of stairs moving, in the parking lobby and in

strategic places trying to catch the attention of all the customers that enter in the shopping center. Concerning the other channel of Personal Selling, the salesperson has one of the most important roles on the communication designs, because he communicates directly face-to-face with the customer. If the customer has had a bad purchase experience he doesn't come again and through WOM can pass the message of his bad experience and damages the Surprise brand and its sales performance. Thus, the client should be well served, the salesperson has to be duly informing him and answer his questions, for the client to become satisfied and with a good image about the brand and the product. If he has a good purchase experience he will remember that and return or even become an ambassador for the SGV. The salesperson will also use the microphone to get customer's attention. Furthermore, he has the role to advise the clients to do the registration on the Interactive Marketing channel, the website. Through the salesperson one is trying to build a database for further delivery of newsletters to customers, a channel that belongs to another tool, the Direct Marketing. Although, through the newsletters (for the ones that already are registered) it will be possible to reach customers that in that week didn't plan going to the shopping center but after receiving it, they are tempted to go, just to participate in the prize draw. The Surprise Mascot, belonging to the Events and Experiences' tool will allow to create a "brand-related interaction with the clients in the day of the winners' announcement. Once the prize draw is related with the offer of automobiles, it's expected the creation of some buzz, one of the channels of the WOM's communication mode.

As it can be seen, in this communication design there will be used seven modes of communication mix. It's evident that all the modes of communication are combined with each other and without this combination, the prize draw will not have so better results if only one is used.

To the communications designs of this communication plan, all the modes of communication mix will be combined (IMC) as it is possible to see in Table 3, aiming to “*build brand equity and create better sales results*” (Kotler *et al.*, 2009).

6. TIMELINE

	Sep.'13	Oct.'13	Nov.'13	Dec.'13	Jan.'14	Feb.'14	Mar.'14	Apr.'14	May'14	Jun.'14	Jul.'14	Aug.'14
Gift Card's Launching												
Stand (Event)												
Stand Ups												
Digital Mupis												
Elevators												
Food Court Tables												
SGC Website												
Christmas												
Stand Ups												
Digital Mupis												
SGC Website/Newsletter												
Automobile's Prize Draw												
Stand Ups												
Digital Mupis												
SGC Website/Newsletter												
Valentine's Day												
Stand Ups												
Digital Mupis												
SGC Website/Newsletter												
Women's Day												
Surprise Mascot												
PromoFans Promotion												
Digital Mupis												
PromoFans Website/Newsletter												
SGC Website/Newsletter												
"Surprise Eggs Hunter" (1 day)												
Stand Ups												
SGC Website/Newsletter												
"Helping Hands Wall"												
Stand Ups												
SGC Website/Newsletter												
Holiday Season												
Stand Ups												
Food Court Tables												
SGC Website/Newsletter												

7. CONCLUSIONS AND EXPECTED RESULTS

The information collected to support the communication plan had a crucial role commencing with the literature review and ending with a deep information analysis, which provided the development of the Surprise Gift Voucher's SWOT matrix. From this matrix, a set of conclusions and insights were withdrawn and used as the basis for the development of the Communication Plan.

The communication plan aims to have a constant and active presence of the brand during twelve months, taking always in account the achievement of its objectives. Thus, the Surprise Gift Card's launching will be the kick off of the communication plan, as well as the Surprise Mascot, which will intend to create brand knowledge in the target audience's mind throughout the year. The other communication designs developed (except for Christmas season, because it has a good net profit margin) it will consist in a mix of sale promotions activities and brand activations, creating special interactions with customers, in order to reach the defined objectives. It will also be made a solidarity event.

The message strategies of the communication designs will be created to fit the target audience, in order to associate the brand "Surprise" to the Gift Card and not to the Sonae's shopping centers. In the Surprise Gift Card's launching, a strong communication to customers will be done, in order to really understand what the "Surprise" is. The leftovers of the communication designs will be mostly done in special days to remember that, the Surprise Gift Card is a gift option and for some of the customers, the best option.

Taking into account the budget allocated to the communication plan, it will be expected to reach the maximum impact of the results through the combination of the different communication mix (IMC). Based on the literature review, one can extract that the communication in shopping centers should first be done internally. The Mall Activation Department also consider that it's most important to communicate to the customers/visitors of the shopping center than to the outside (unless if the budget was higher). This was the bottom line to the media mix's selection.

The strategic tools used to reach the communication plan's objectives it will be the Sales Promotion and the Events and Experiences. The accomplishment of a social

responsibility event it will also done, Public Relation and Publicity tool, toward the creation of some brand reputation and company's goodwill, but especially increase further brand notoriety.

The tool that will combine with all the communication designs trough different channels, inside the shopping centers is the Advertising while, outside the shopping centers, will be the Interactive Marketing through the website channel. The Direct Marketing tool will reach the target audience effectively using also an online channel, the website. The Personal Selling, namely the salesperson of the information desk will have a key role in the boost up of the database and, from the communication designs there will be expectations of a positive WOM.

Thus, managing and combining all the elements of communication mix it is predictable to create a communication plan integrated and effective. The main purpose it will be to increase the brand purchase intention and raise the Surprise brand awareness, overcoming the seasonality problem that the Surprise Gift Voucher had faced in the last years and, in a long term, generating engagement by customers.

It's important also to point out that, the communication designs will be developed attempting to achieve the whole Sonae Sierra's portfolio. However, due to budget limitations, at least, one of the Top 5 shopping centers will be always included in the communication designs. So, whenever it makes sense, even if the communication designs only happen in one or two shopping centers of the Top 5, the offline communication tool, the Advertising, will be spread to all. Therefore, the communication designs priority will be always the Top 5 shopping center, the ones placed in Greater Lisbon and Greater Oporto and finally, all the shopping centers of the portfolio trying to reach the maximum customers belonging to the target audience.

Other limitation, that do not allow the communication plan be even more effective is the impossibility of having a Facebook Page, Interactive Marketing channel, due to internal policy reasons. From the data previously collected about this social network, almost half of the Portuguese population uses it. It's one of the most efficiently and effectiveness tools that allow, not only to communicate directly with the target audience and interact with them every single day, but also, to divulgate all the communication designs that happen inside the shopping centers. Thus, this tool will provide the communication outdoors to the target audience without extra costs.

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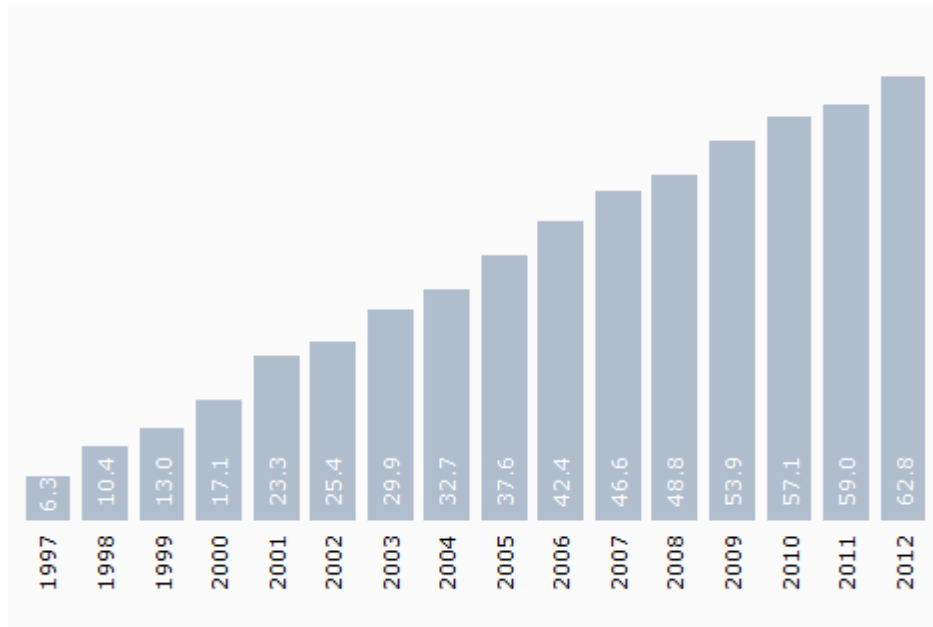
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ANNEXES

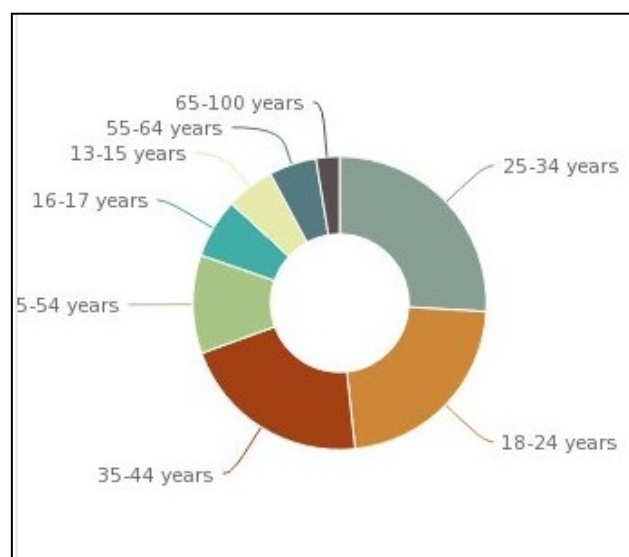
Annex 1: PEST Analysis

Annex 1.1: Evolution of the number of internet users in Portugal from 1997 to 2012 (%)



Source: Marktest, Bareme Internet on Tek-Sapo, 2012

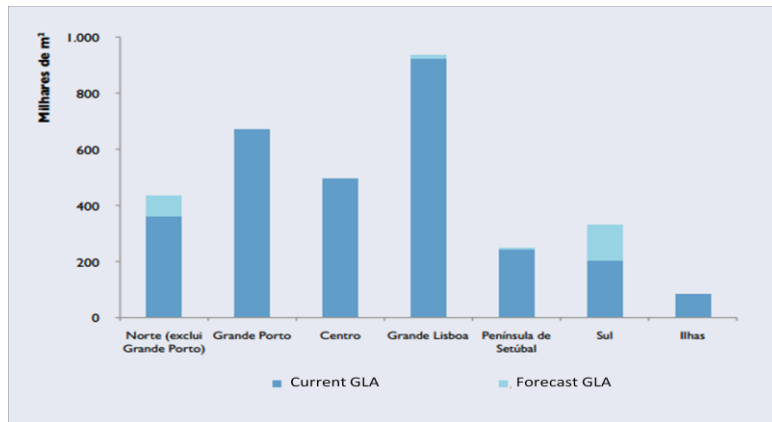
Annex 1.2: User age distribution on Facebook in Portugal



Source: Socialbackers, 2013

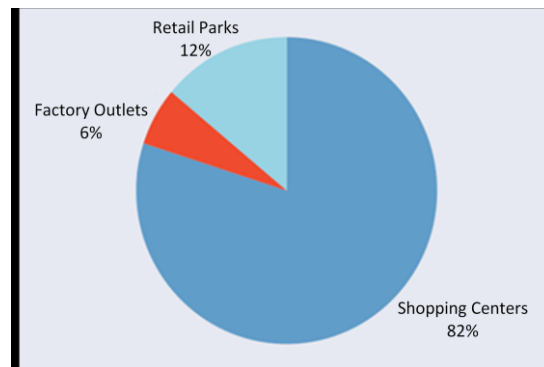
Annex 2: Retail Sector Analysis

Annex 2.1: Current and Forecast GLA by region (2012/2015)



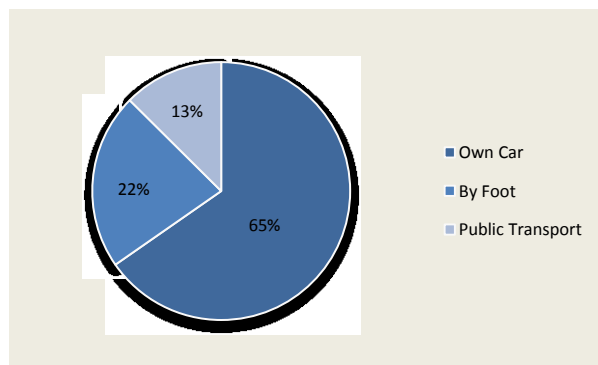
Source: Cushman & Wakefield, Autumn 2012

Annex 2.2: Current GLA by format (2012)



Source: Cushman & Wakefield, Autumn 2012

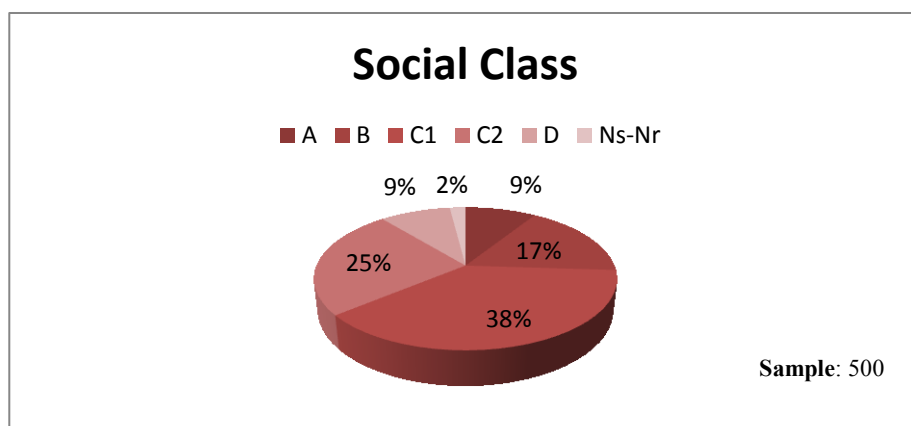
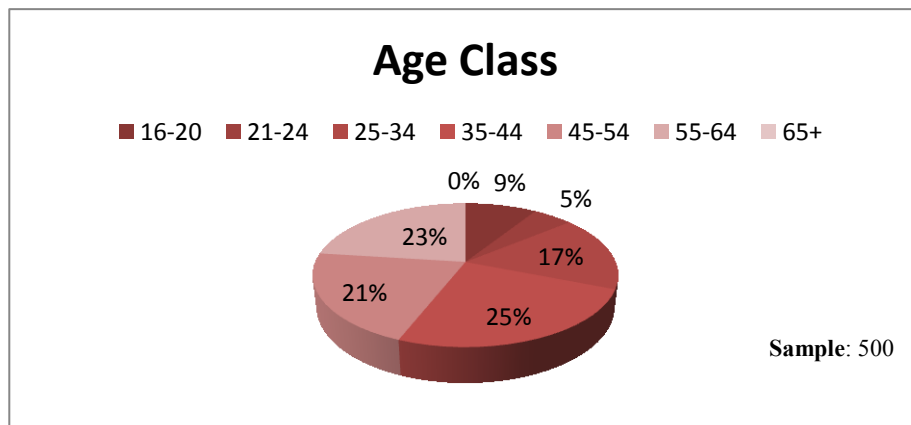
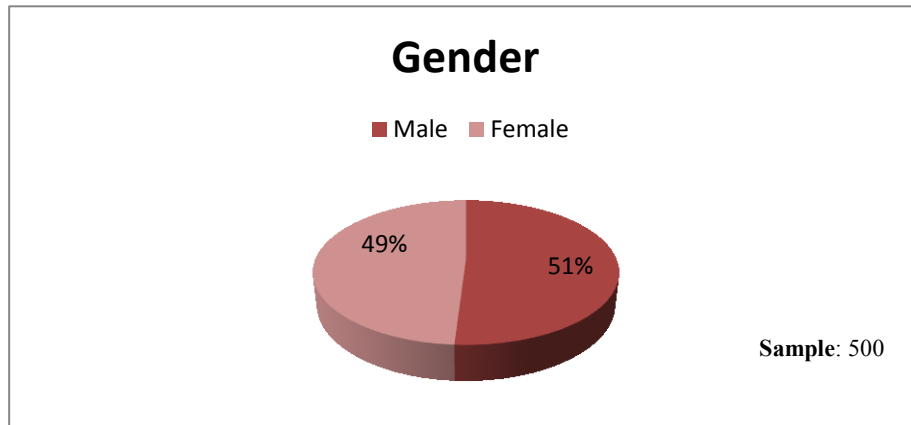
Annex 2.3: Means of travel used by customers (2011)



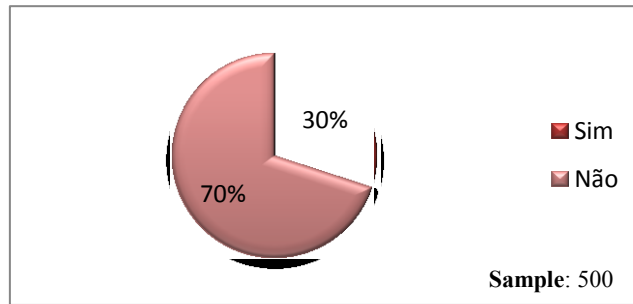
Source: APCC Member Survey, 2011

Annex 3: Questionnaire's Results of the SGV's Penetration (n=500)

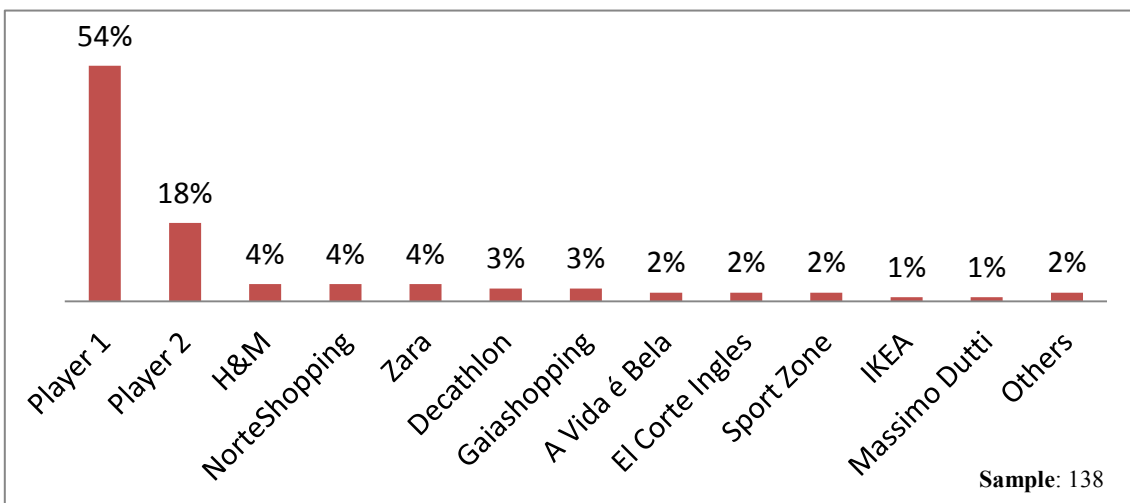
Annex 3.1: Sample Profile regarding the Gender, Age Class and the Social Class



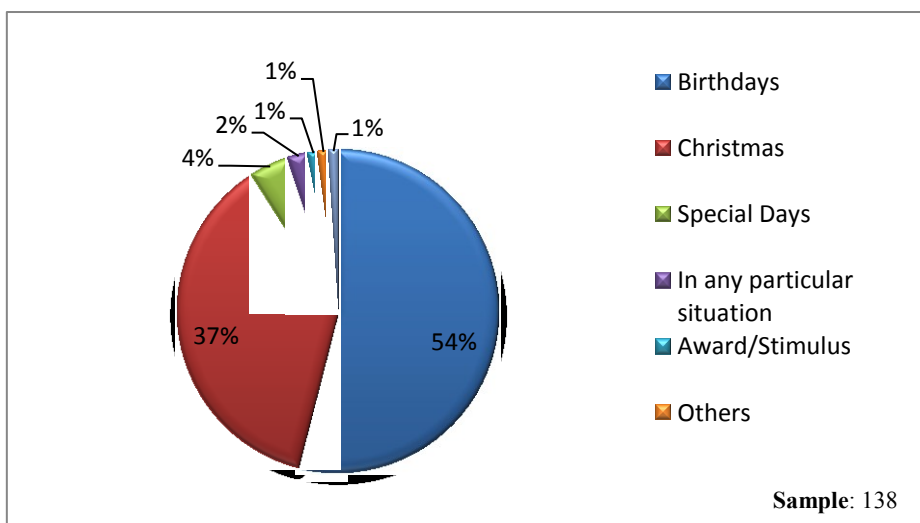
Annex 3.2: Have you ever bought a gift card/voucher?



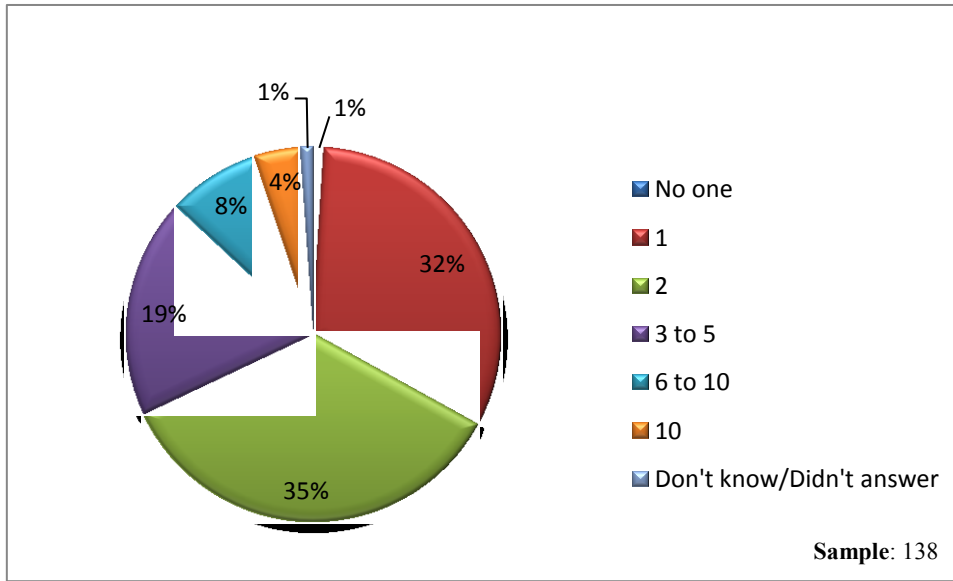
Annex 3.3: What brand or store has already bought gift cards/vouchers?



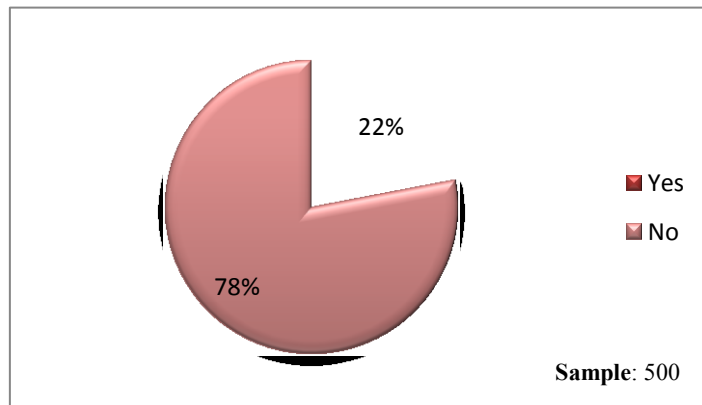
Annex 3.4: In which situations you usually buy gift cards/vouchers?



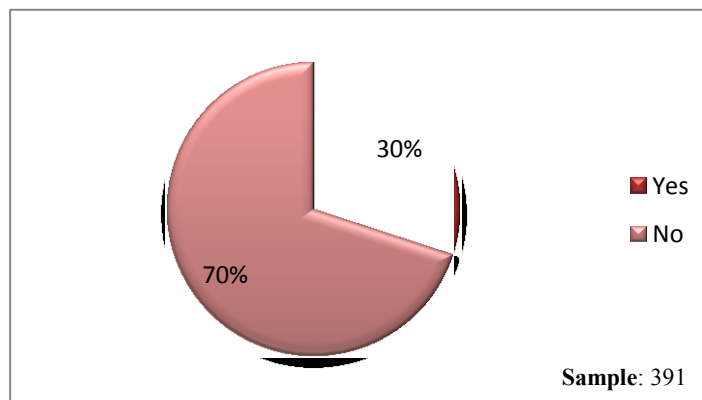
Annex 3.5: How many gift cards/vouchers you usually buy per year?



Annex 3.6: Do you know the Surprise Gift Voucher?



Annex 3.7: The Surprise Gift Vouchers are the Gift Vouchers of Sonae Sierra's Shopping Centers. Have you ever heard about these gift vouchers?

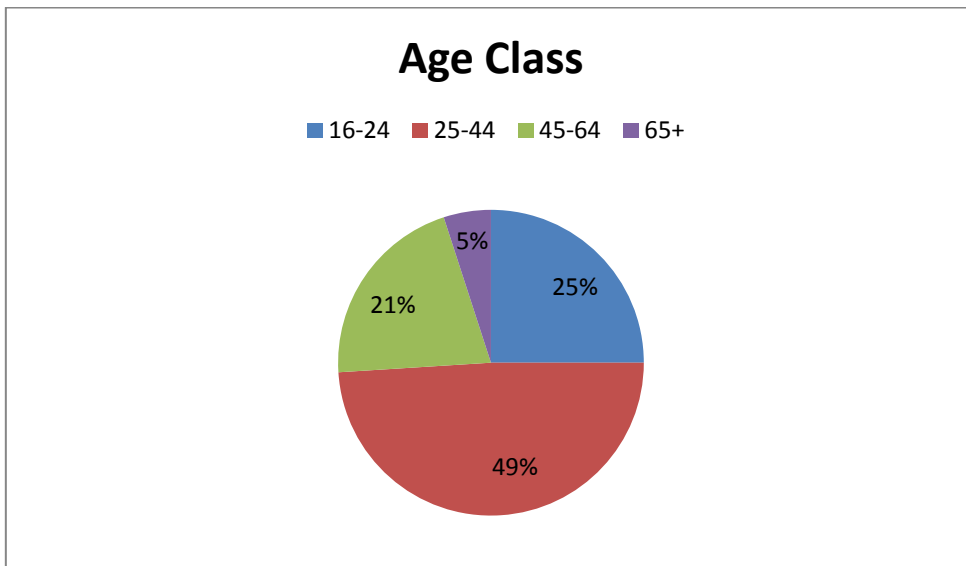
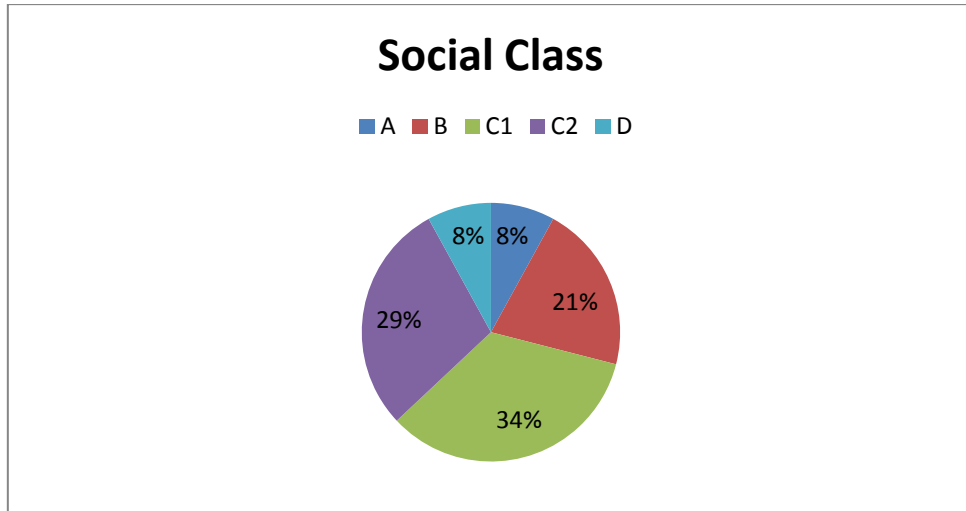


Annex 4: Segmentation Criteria

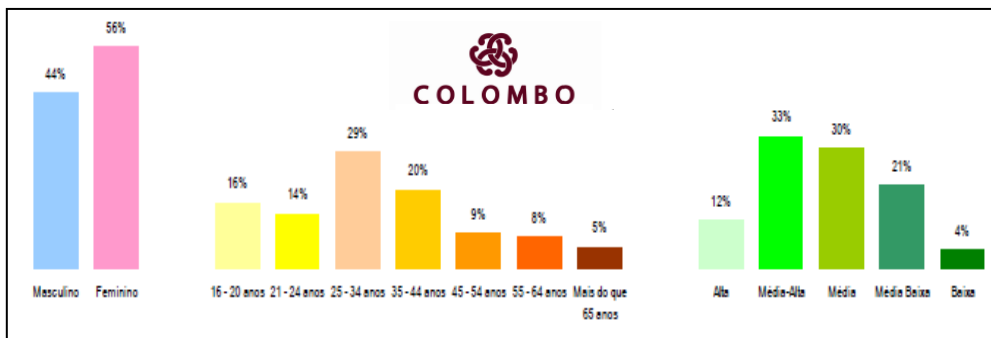
Variable	Sub-Criteria	
Geographic	Country	Mainland Portugal and Islands
	Regions	Urban Rural
Demographic	Age	0-14 15-24 25-34 35-44 45-54 55-64 + 65
	Gender	Female Male
Psychographic	Social Class	Upper Upper Middle Middle Lower Middle Lower
	Lifestyle	Active Sedentary
Behavioral	Loyalty Consumer	Frequent Sonae Sierra SC's Don't frequent Sonae Sierra SC's
	Buyer Status	Regular Occasional
	Attitudes toward the Product	Know the SGV Don't know the SGV Convenience Shoppers Last Resort Indifferent Interested
	Desire Benefits	Looking for the perfect gift Looking for a gift Don't looking for a gift Don't know what should offer Know exactly what they want Enjoy giving gift cards Don't enjoy giving gift cards Enjoy receiving gift cards Don't enjoy receiving gift cards

Annex 5: Consumer Profile

Annex 5.1: Sonae Sierra' Shopping Centers (whole portfolio)



Annex 5.2: Top 5 Shopping Centers



Communication Plan to Surprise Gift Card

