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MARKET ANALYSIS TOWARDS SUSTAINABLE LAUNDRY DETERGENTS: CHANCES OF PENETRATION OF AN ITALIAN ECOLOGICAL DETERGENT

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"Per un mondo più pulito."

Winni's

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I am grateful to have you by my side.

Abstract

The most urgent imperative of our current century is the concern about the Environment. Sustainability may be considered as the key solution to this universal problem. Living in a consumer society means that humans' actions always have a sort of impact on what will be our common future. This, together with the fast growing population rates, implies that something have to change in the pattern of consumption worldwide. In general, emerging economies are those that from this point of view scare the most, due to their increasingly augmenting urbanization, together with their enormous size and their retrograde industrial development and regulations. Specifically Brazil, with its exponential growth and its continental dimensions represents one of the biggest consumption forces of the planet. Since behavioral studies among ecological consumption in this country are mainly concentrated on organic food, this present work aims to analyze the market toward sustainable products in the cluster of Porto Alegre. Precisely, the pattern of consumption toward laundry detergents are inferred, in order to (a) identify the offer of laundry detergents in the market; (b) understand how does the purchasing process of laundry detergents occurs; and (c) define values and attitudes that drives green consumers' behavior, investigating the chances of penetration of an Italian green product. This work is disclosed through a triangulation of three different phases. Starting from the delimitation of the theoretical background both of consumer behavior and green consumption, it was then followed a qualitative research, either secondary and primary – via semi-structured interviews – supported by a quantitative Schwartz survey with the aim of inferring values and attitudes of the segments of interest. Results of the research depict a market that would be ready to consider greener product among the offers, either due to environmental consciousness or to slight displeasure of the average quality of the already commercialized product. At the same time, consumers would not be ready to face any high trade off between price and quality, thus would rather be exposed to a democratization of the green offer. This study improves knowledge on the weight that ecology awareness together with social considerations and personal values influence pattern of consumption, offering a description of a potential market for ecological laundry detergents.

Key words: sustainability, ecology, ecological laundry detergents, consumer behavior.

Sumario

O imperativo mais urgente de nosso século atual é a preocupação com o meio ambiente. Sustentabilidade pode ser considerada como a solução chave para este problema universal. Vivendo em uma sociedade de consumo significa que as ações dos seres humanos sempre têm uma espécie de impacto sobre o nosso futuro comum. Isso, juntamente com as taxas de população em rápido crescimento, implica que algo tem que mudar o padrão de consumo em o mundo todo. Em geral, as economias emergentes são aqueles que, deste ponto de vista, assustam mais, devido as suas urbanização cada vez mais em aumento, juntamente com os seus enorme tamanho e o seus desenvolvimento industrial retrógrado e privo de regulamentações. Especificamente o Brasil, com o seu crescimento exponencial e as suas dimensões continentais, representa uma das maiores forças de consumo do planeta. Porque os estudos comportamentais sobre o consumo ecológico neste país concentram-se principalmente em alimentos orgânicos, este presente trabalho tem como objetivo analisar o mercado para produtos sustentáveis no cluster de Porto Alegre. Precisamente, o padrão de consumo em direção a detergentes para a roupa são inferidos, a fim de (a) identificar a oferta de detergentes para a roupa no mercado; (b) compreender como é que ocorre o processo de compra de detergentes para a roupa; e (c) definir valores e atitudes que impulsionam o comportamento dos consumidores verdes, investigando as possibilidades de penetração de um produto Italiano verde. Este trabalho é divulgado através de uma triangulação desenvolvida em três fases diferentes. A partir da delimitação teórica do comportamento do consumidor e do consumo verde, segue uma pesquisa qualitativa, de modo secundária como primária – através de entrevistas semiestruturadas – apoiadas por uma pesquisa quantitativa de Schwartz com o objetivo de inferir valores e atitudes dos segmentos de interesse. Resultados da pesquisa mostram um mercado que estaria pronto para considerar um produto mais verde entre as ofertas, quer devido à consciência ambiental, ou ligeiro desagrado da qualidade média do produto já comercializado. Ao mesmo tempo, os consumidores não estaria prontos para enfrentar um trade-off muito mais alto entre o preço e a qualidade, e estaria bastante inclinado a uma democratização da oferta verde. Este estudo melhora o conhecimento sobre o peso de essa consciência ecologia que, juntamente com considerações sociais e valores pessoais, influenciam o padrão de consumo, oferecendo uma descrição de um mercado potencial para detergentes de roupa ecológica.

Palavras-chave: sustentabilidade, detergentes para roupa ecológica, ecologia, comportamento do consumidor.

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1 INTRODUCTION

1.1 Problem Statement Background

Sustainability is the big imperative of our current century. In the era of fast information flow -disposable for almost everyone –global citizens are aware of the urgency of this topic, and tired to accept forceless environmental disasters such as the Bento Rodrigues dam one[1].

An overture on the topic started in the 70s, through the introduction of the Earth Day and with the United Nations Conference on the Human Environment, when industrialized and developing nations jointly delineated the "rights" to a healthy and productive environment. The first relevant initiative concerning the topic sustainability is dated 1983, when the United Nations General Assembly gave birth to the Brundtland Commission, formally known as the World Commission on Environment and Development (WCED). The aim of the commission was to unite countries to push sustainable development together. WCED (1987, p. 39) defined that sustainable development "seeks to meet the needs and aspirations of the present without compromising the ability to meet those of the future".

WCED report "Our Common Future" identified the environment as in cohesion with the humans concerns; it is interconnected with human actions and they both influence each other. As we live in a consumer society (SOLOMON *et al.*, 2013) in which our social life is organized more around our role as consumers in the consumption system, sustainable consumption is globally one of the top priorities, together with understanding the behavior of green, ecology-sensitive consumers (PAGIASLIS, KYSTALLIS, 2014). Indeed, any purchase decision derives from a more or less sustainable pattern of consumption and implies ethical, resource, waste and community impact (YOUNG *et al.* 2009). That is why consumer behavior is the starting point to make a contribution to sustainable development (MOSER, 2015).

[1] *http://www.abc.net.au/news/2016-02-29/bhp-samarco-dam-collapse-brazil-linked-to-ramping-up-production/7201022*

Parallel with the popularity of the sustainability topic, nowadays consumption growth is boosting. This, even if could eventually be seen as the solution to global problems such as poverty, unemployment and inequality, represents a cause of environmental degradation too. That is why there is an increasing awareness that from now on growth in consumption must respect planetary boundaries and be “green” (OECD, 2011).

In the era of Globalization, Emerging economies are those that frighten the most when concerning about environmental issues. Defined as rapidly growing and volatile, they usually promise huge potential growth but with significant political, monetary and social risks. Global index providers may include in this category rather wealthy countries, but with economies that are still considered underdeveloped from a regulatory point of view[2] (Financial Times, 2016).

The association of emerging national economies acronym is BRICS; Jim O’Neill, then chief economist at Goldman Sachs Asset Management, coined it in 2001 in order to describe the titan member countries, i.e. Brazil, Russia, India, South Africa and China Their stage of industrial development foresees an environmental degradation that belonged to their rich developed neighbors centuries ago. What frighten the most is that BRICS countries have in common not only the economic situation, but also the size and the relatively young population. Indeed, these five countries represent 42% of the global population by themselves, meaning that their environmental footprint on a worldwide level cannot pass unnoticed. Thus the BRIC, and other emerging market countries, are trying to face the dual challenge of promoting economic growth and mitigating the environmental impact of their growth techniques.

Brazil, as fifth largest country in the World, with its continental dimensions and with its exponential growth will represent one of the biggest consumption forces in the planet. Indeed, according to Euromonitor (2015) in 2030 is estimated to have a population around 223 million of people, with a likewise increase in urbanization. Moreover, the economical rise of the middle class has brought more than 100 million people to the marketplace, stimulating consumerism (DE BARCELLOS *et. al*, 2014). Even if the economics of this country still can be defined as emerging, a report of National Geographic (2015) indicated consumers in this

[2] *http://lexicon.ft.com/Term?term=emerging-markets*

type of market as the most likely to state their awareness of how environmental problems are having a negative impact on their daily lives. This is remarked by a report of Euromonitor International (2015) too, where Brazil is depicted as one of the countries with highest levels of concerns about environmental damage, but with a gap of expression of this concern as consumers, not only due to the lower incomes, but mainly to the lack of availability of specifically marketed environmentally friendly products.

That is why it is interesting to see that environmentally friendly products in Brazil are still almost inexistent, with a gap of availability of product choice for those consumers that would considers themselves as “green”. Indeed, in Brazil eco-innovative products are seen as a highly differentiated segment, with both higher quality and prices (DE BARCELLOS *et al.*, 2012), and usually result in consumption from small-scale specified businesses (EUROMONITOR INTERNATIONAL, 2015).

Eco-innovation - defined by Boons and Lüdeke-Freund (2013) as the search of new technologies and new social practices that make society more sustainable - may be considered as the answer to the needs for sustainability, as it is an output which can be achieved by companies, which are encouraged by the government and demanded by the society (BOSSLE *et. al* 2015). Eco-innovation would be able to bring positive trade-offs between the environmental necessities and companies’ critical success factors. According to Guber (2003), environmentalism is today a part of our popular culture, and a reflection of modern sensibility, reinforced by the influences that surround us in our daily lives, such as magazines, books and TV shows.

In Europe, sustainability is an imperative since 1997, when sustainable development was included in the Treaty of Amsterdam as fundamental objective of the Union. Indeed, the following is the outline of the EU 2001 Sustainable Development Strategy:

> The overall aim of the EU Sustainable Development Strategy is to identify and develop actions to enable the EU to achieve a continuous long-term improvement of quality of life through the creation of sustainable communities able to manage and use resources efficiently, able to tap the ecological and social innovation potential of the economy and in the end able to ensure prosperity, environmental protection and social cohesion.
>
> (EUROPEAN COUNCIL, 2001)

More recently, in 2010 Europe adopted the 2020 Strategy, a 10-years plan aimed at improving the economy along with reaching sustainability goals. That is why in Europe sustainability may be considered a topic that is present in everyday lives, on the contrary of what it happens in Brazil, where eco-innovator products variety it is still very small and mainly concentrated in the agricultural area (DE BARCELLOS *et al.,* 2012).

1.2 Research problem

Winni's, an Italian brand that offers a complete range of high quality ecological detergents with low environmental impact, due to its vegetable based actives, and easy and quickly biodegradable characteristic, is the product that was investigated. This brand was chosen since it perfectly represents the eco-innovative answer to sustainable detergent consumption. Indeed, it is the leading Italian brand in the ecological detergents market, with a key differentiation strategy that democratize the green concept by offering high quality products, respectful for the environment without asking any trade-off to consumers (as it will be better explained in Chapter 4).

In here lies the core of this dissertation, which aims at answering the following research question: how would consumers of the cluster of interest perceive the positioning of a 100% green product in their daily purchase decisions? That is why to answer to this problem it was chosen the particular segment of laundry detergents market. Indeed this latter is a market where it is impossible for consumption to stop (EUROMONITOR INTERNATIONAL, 2015), and which has a high impact both on the consumer and on the environment – since they are typically used with water that goes down to wastewater treatment systems[3].

In this regard, Brazil is a potential market for Winni's laundry detergent products. According to Hofstede's six cultural dimensions[4], distance between Italy and Brazil is relatively small, that is why it would be interesting to conduct a research aimed at

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[3] *http://www.cleaninginstitute.org/clean_living/soaps__detergents_safety_2.aspx*
[4] *https://geert-hofstede.com/brazil.html*

investigating the potential of entry of an Italian brand of laundry detergents in the Brazilian market. Specifically, this research was conducted in Porto Alegre, the capital of Rio Grande do Sul, where the highest concentration of Italian immigration occurred. Indeed, between 1875 and 1914 RS received around 80 thousand Italian immigrants[5]. In addition, Porto Alegre is recognized as the first city in Brazil to stimulate the ecological movement in the 70's with the creation of the Associação Gaúcha de Proteção ao Ambiente Natural in 1971 (AGAPAN, 2016). Up until today, the environment is a societal priority.

1.3 Objectives

In order to accomplish the proposed research problem, this work aims to achieve the following objectives.

1.3.1 General Objective

To analyze the market of Porto Alegre towards sustainable laundry detergents.

1.3.2 Specific Objectives

The secondary objectives that have been outlined in order to support the general objective are the following:

(a) To identify the offer of laundry detergents in the market;
(b) To understanding how does the purchasing process of laundry detergents occurs;
(c) To define values and attitudes that drives green consumers' behavior;

[5] *http://www.portalitalia.com.br/historia/rs/comunidade_mapa_rsvejamais.asp*

1.4 JUSTIFICATION

According to Kotler (2005), market segmentation allows the choice between acting in the market as a whole or in groups with specific characteristics. To identify a market segment would reduce the dispersion of efforts since a specific focus would be defined. On the opposite, by now few were the researches on consumers' environmental and ethical drivers in emerging economies such as Brazil (KRISTALLIS*et. al*, 2012; DE BARCELLOS *et al.*, 2011, 2012, 2014; THØGERSEN *et al.*, 2013) and most of these studies are focused on organic food consumption, meaning that still there is a lack of definition of green Brazilian consumers' behavior, especially for grocery stores habits and more specifically, for household cleaning products, such as green laundry detergents.

In order to effectively understand the potential of entry for green products in the Brazilian market, this research will be fundamental so as to understand Brazilian consumers' habits and to define the segment that would be the ideal buyer of a 100% ecological laundry detergent. That is why the present study aims to investigate the profile of consumers in Porto Alegre through the understanding of the drivers of his/hers laundry detergents purchase decisions, investigating values, attitudes and beliefs influencing consumers' buying behaviors towards green products. Moreover, this would represent an important market overview for an eventual foreign entrepreneur that would enter Brazil, since it will provides a general idea of the chances of success for an ecological product in this market.

2 LITERATURE REVIEW

As previously stated, consumer behavior is the starting point to make a contribution to sustainable development (MOSER, 2015). That is why in order to conceptualize a theoretical framework for this work it is going to be presented an ascending part that starts from the delineation of historical Consumer Behavior theories, and that leads to more recent Green Consumer Behavior ones through the explanation of the different paths of consumption. The purpose is to delineate the main theories of Consumers Behavior – and more specifically of its "Green" branch – as they are the necessary tools for market understanding and consequently assessment.

2.1 Consumer Behavior history

According to Arndt, Consumer Behavior can be defined as

> The mental and physical acts of individuals, households or other decision-making units concerned with the ultimate consumption involving the acquisition, own production, use and, in some cases, the dispossession of products and services (ARNDT, 1986, p.23).

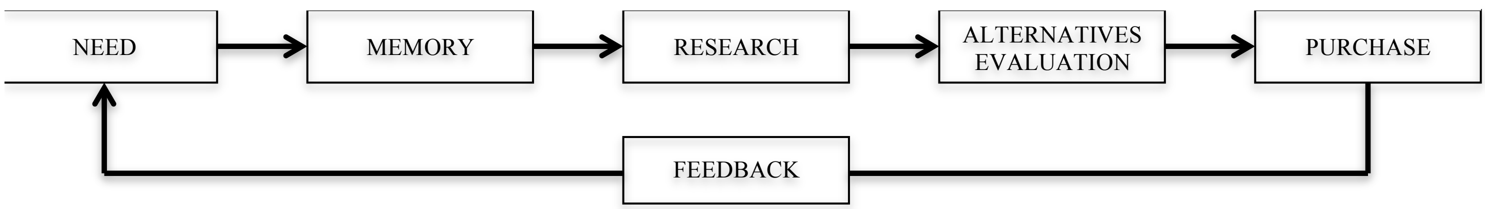
Consumer Behavior as field clearly established itself in the early 60s, and nowadays might be considered both multinational and multidisciplinary. Indeed, psychologists, economists, sociologists and political scientists contributed to enrich what can be considered the most important marketing's sub-field in order to understand the drivers that conduce consumers through the process of buying (SOLOMON *et al.,* 2013).

Arndt (1986) identified the 30s-40s as the decade where this discipline arose. Specifically, he thought meaningful to define five different historical phases of the discipline based on the priorities of the researches. These five phases were, chronologically:

1. The Empiricist phase
2. The Motivation research phase
3. The Formative phase
4. The Utopian grand theories phase
5. Information processing phase

The evolution among the previous phases from the 40s to 80s started with the idea that the consumer was a perfectly rational decision maker. The 50s saw the entrance of the Freudian concepts and of the unconscious drivers of the mind, while it was from 1960 to 1965 that the first specialists begun to specifically research on consumption and consumers, giving birth to a distinctive branch from marketing. There was then an attempt to build comprehensive theories and general models of consumer behavior, but their failure, together with the interest of advertisers in understanding the collection, reception, interpretation and storing of information both in the long and short term memory of consumer highlighted the importance of consumer information processing. In these models individuals, exposed to external stimuli, elaborate and store information. Once that a "need" arise, the consumer will glean to this information and, through the analysis of possible alternatives, will purchase. Results of the choice –i.e. satisfaction or not – will be the feedback of the process, thus the procedure of purchasing behavior will be either confirmed or modified depending on it (EAST, WRIGHT, VANH, 2003). This purchasing decision process is described in Figure 1.

Figure 1: purchasing decision process



Source: East, Wright, Vanh (p. 5, 2003)

One of the most interesting branches of Consumer Behavior discipline developed in the 70s regards information elaboration, which principal exponent was Bettman (1970, 1971, 1979). With others, Bettman tried to identify modalities of stimuli reception, and how consumers will use them in the decision-making process. This work gave useful hints to design communication context and physical locations around which consumers moved. The 80s were the period where main changes and renovations of the discipline occurred. Indeed, probably is 1986 the year when main changes occur in the field: some American researchers (mainly anthropologists) travelled along United States to observe and study consumers' behavior. This gave birth to some books and articles that spread and validated a naturalistic research strategy (BELK, 1991).

From this moment on, consumer behavior conventions and journals begin to be attended by anthropology, sociology and semiotic scholars whom contribute to the renewal of the discipline both by contents and methods. New arguments are, for example, the symbolism relative to the purchase, hedonistic consumption, emotion's role, the meaning associated with products, impulsive purchase, collecting etc. Methods of analysis are those of naturalistic research, aimed at observing the consumer in its natural habitat through typically qualitative inquiries such as observation, introspection, interviews, etc.[6]

2.2 Consumers' buying process

According to Solomon et al. (2013, p.5), Consumer Behavior study is "the study of the processes involved when individuals or groups select, purchase or dispose of products, services, ideas or experiences to satisfy needs and desires". This study widens from a micro to a macro spectrum, i.e. respectively from an individual to a social focus of consumer behavior, crosswise multiple disciplines such as social psychology, micro and macroeconomics, semiotics, demography, cultural anthropology, human ecology just to cite some. In fact, buyer's decision process is influenced not only by the individual characteristics of a person, but also by the environmental stimuli and by the psychological processes. This process involves seven steps, which are stages among which the buyer necessarily goes through without even realizing. These are:

1. Need recognition
2. Information research
3. Evaluation of alternatives
4. Purchase decisions
5. Consumption
6. Post-purchase evaluation
7. Disposal

[6] *http://www.acrwebsite.org*

What differentiates one stage to another is the level of involvement, which depends on the time needed to go through the process and on how much effort should be put in it. The first phase regards the manifestation and the recognition of a need: this occurs every time that there is a significance distance between the ideal and the actual state of a consumer. Gordon Burner's model, dated 1986, considers problem recognition as it might be generated in three ways:

- Changes in the actual state: for example when the actual state of your laptop makes you need to buy a new one either because it does not work anymore or because it is in an obsolescence state;
- Changes in the ideal state: when new improved products are continuously launched in the market, with better performances and design. This might arise an opportunity recognition in consumers, whom sees an increment in products standards;
- Combination of the two previous factors.

Clearly it exist a lot more situations that may arise consumer's problem recognition; anyway they are always related to changes either in the ideal or in the actual state. In general, need recognition is always influenced by three factors: memory of previous purchases, environmental influences (such as culture, social class, personal influences, family, and situation) and individual influences (consumer's resources, motivation, knowledge, attitude, personality, values and life-style). For example some situations might be the depletion of the goods in stock, the dissatisfaction of a product, changes in economic situation, changes in desires and needs, new product information disposal, and new product purchase.

The second stage following the need recognition is the one of information research about the evaluation of alternatives. This research might be either be deliberate or "accidental", and also either internal, i.e. based on memorized information, or external, i.e. when information comes from the environment. Van Raaij (1977) demonstrated that when they have to make a choice, consumers use a minor quantity of external information if the product is already known, thus gleaning information from memory and previous experience; on the contrary, if internal information is not sufficient, the consumer will research for external information.

The third stage of the process concerns the evaluation of alternatives. It is important to remind that judgment of different product differentiates from the purchase itself. In this phase the consumer still did not make a choice, he/she is just evaluating the probabilities that a certain product has determined attributes, and he/she is considering the relevance of these latters. Attributes of a product/service are what mainly drive the purchase decision; they might be distinguished among "salient" attributes, which are anything that the consumer is able to perceive, and "determinant" attributes, which are those responsible for the final choice. Another factor that influences the choice is the attitude of the consumer. Attitude might influence the evaluation, which may be either cognitive/rational or emotional/affective.

Right after the evaluation of alternatives, the fourth stage is the actual purchase decision. This action it is not necessarily fully planned. Indeed, it might also be partially planned or not planned at all, i.e. impulsive. According to Kotler and Keller (2005), purchase decision may be disrupted only by two factors: negative feedback from other customers, and the level of motivation that makes the consumer to comply with that specific feedback. For example a consumer after the whole decisional process may opt for a specific camera to buy, but if after this choice a friend - who is a photographer - gives a negative feedback on that specific model, the consumer may change his final choice. Moreover, purchase might be disrupted by a sudden change in the situation, for example by an unexpected job loss. The purchase phase is followed by consumption, which might not necessarily occur immediately; not only it might be postponed, but the main object of consumption might be changed completely.

The last two phases of the buyer's decision process are respectively post-purchase evaluation and disposal. Post-purchase behavior is critical in determining whether a customer will generate a brand loyalty or not. It is the phase where the customer compares the product or the service consumed with the initial expectation and with his/her being satisfied or dissatisfied. This will affect the decision process that will occur in the future for similar products/services. Satisfaction will result in brand loyalty and eventually in word-of-mouth, i.e. external information for other consumers. Finally, the last stage is the disposal of a product. Not necessarily this means "elimination", it might also consider other options such as resell/rent/loan, or either exchange, recycle or giving a new purpose to the object (SOLOMON *et al.,* 2013).

2.3 Green thinking and consumer behavior

The trend of growing interest in global health may be referred to as "Conscientious consumerism", and it is related to the social focus on preservation of the environment. The segment of consumer who is driving this change is named LOHAS, i.e. "lifestyles of health and sustainability", and it represent the market for products such as organic food, alternative medicine, yoga classes, energy-efficient appliances etc. (SOLOMON *et al.*, 2013). Thus, ordinary consumers are the ones who are taking action, which is why companies have to respond to this trend in order to satisfy the increasing demand of this segment. Nielsen (2015) reported that globally, 34% of consumers declared to buy a brand over another for conscience reasons, and 64% would like to adopt this behavior in the future. The same report, based on 33,000 respondents from 60 countries, states that 55% of respondents would be "willing to pay more for products and services provided from companies that are committed to positive social and environmental impact"(NIELSEN, 2015, p.8).

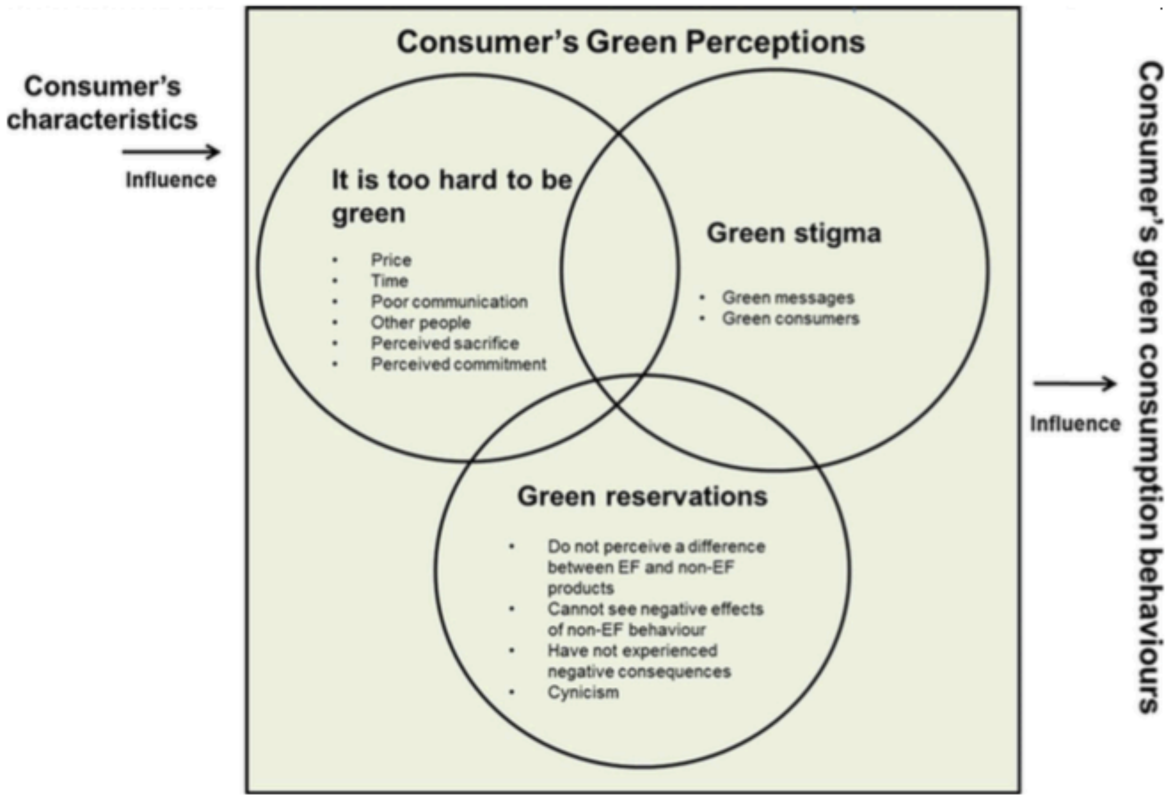
The rapidly increase of population reminds to the human beings that the need for sustainable development is present and is urgent. This change might be possible through the use of product, process, and organizational innovation that will lead to a noticeable reduction in environmental burdens. These positive environmental goals may either be direct or collateral effects of innovation, and are the consequence of companies' behavior or of consumers' use of product and services (HORBACH, RAMMER AND RENNINGS, 2012). Therefore, innovation is the strategic tool that will permit sustainable development. Specifically, the branch that would make the difference is the eco-innovation one, which is – as defined by Boons and Ludeke-Freud (2013) – the search for new technologies and new social practices to make society more sustainable.

In everyday life, consumer behavior is the first step towards sustainable development. Indeed, according to Fisher *et al.* (2013), groceries account for a substantial share, up to one third of environmental impact of household consumption, in which categories such as mobility, home improvement, construction and telecommunication are included. That is why green purchasing decision may be considered not only a source of environmental benefits, but also as business opportunities. On this concern, scholars investigated a lot on the issue of why consumers' green attitudes are inconsistent with their actual purchasing behavior, without clearly identifying which are the major roles and factors that drive the green decision-making process. Indeed, Strong (1996) diagnosed that some consumers continue to buy environmentally hazardous products regardless of their concern for green alternatives. According to consumer behavior theory, anticipated satisfaction from a product's consumption is given by beliefs about the perceived benefits of the product itself. Logically, green purchase is based on personal, social and environmental benefits that may only lead to positive consequences of buying. Thus, why does this attitude-behavior gap exist? Some of the factors identified as responsible to this gap are price, perceived performance and brand trust. According to Johnston and Tang (2014), green consumption drivers are situational factors, price perception, quality perception, risk perception and sales promotions. What happens to ethical/ecological products is that they are associated with gentles-related attributes (LUCHS et al. 2010), and they are not perceived as efficient as the conventional brands. According to the model proposed by Moser (2015), the strong influence of willingness to pay and norms is what limits the impact of attitudes on behavior. Willingness to pay is seen as potential obstacle to green consumption, while personal norms reflecting ethical motives were a second major driver for green buying.

Conclusion of his research was that attitude was not significantly related to green buying. This result might be related to the investigation of Johnston and Tang (2014) where it comes out that green consumption is perceived as something exclusive for a specific segment, due to the difficulties of green purchasing behavior that are related to external factors. According to consumers "it is too hard to be green" due to lack of money, time, knowledge and perceived sacrifice that buying green implies, that is why the authors coined the phrase "*green is haute couture, not ready-to-wear"*. Green is not something you can commit to but it is something you must be ready for. Furthermore, another key finding of the study is that for some consumers the relationship between green attitudes and behavior was a dichotomous one. Until one can fully commit to being green, which in part is driven by the perception that it is too hard to be green, there is a sense of powerless.

Thus, Johnston and Tang (2014) pitch Figure 2 that represents the findings on consumer's green perception:

Figure 2: consumer's green perceptions



Source: Johnston and Tang (2014, p. 322)

The central issue is that consumers' green perception shapes consumers' green consumption behaviors. Consumers' characteristics are here divided in three areas: (1) 'It is too hard to be green' – where perception of external factor makes it difficult to adopt greener consumption practices; (2) 'Green stigma' – which reflects some consumers' unfavorable perception of green consumers and messages; (3) 'Green reservation' – which reflect the ambivalence or uncertainty that some consumers have that the greener consumption practices will make a difference on the environment.

An interesting theory that might explain this attitude-behavior gap of consumption is the Reactance Theory (SILVIA 2005, p. 277). According to it "individuals believe to have behavioral freedoms, but when that freedom is threatened, reactance is aroused". This might be correlated to green consumer behavior in the sense that consumers perceive themselves as free to choose, but when a little difficulty impede their buying process – for example the sacrifice to drive to a specialty store, a higher price, perceived product inefficiency – they are reluctant to comply to the predetermined green behavior. Miniero et al. (2014) identified two individual differences that seem to explain the attitude behavior gap: regulatory focus and time horizon. Regulatory focus is the strategic orientation individuals use to pursue their goals, and it might influence sense of duty toward environmental issues, while time horizon is the perceived time lag between consumers' decision and its outcome, and it can induce them to immediately engage in a specific behavior. Their findings demonstrate that prevention-focused individuals display a higher compliance with green behavior, both in the short-term and long-term time horizons. Indeed, many are the obstacles to green purchasing behavior. Young *et al*. (2009) identified the three main interferences of the purchase products. First, the lack of time of research of the product, together with the decision making and the purchase; then, pricing is the second main driver followed by the great cognitive effort needed to overcome the lack of information. In the end, consumers may prioritize non-green criteria of the product of interest, and not choosing the more ecological one.

Whenever a purchase decision is taken a more or less sustainable pattern of consumption is implied. This, because further implication to the purchasing act are unavoidable, and covers different levels of responsibility, affecting sustainability, environmental and social settings in the society. There is little evidence to support that green attitudes and beliefs actually translate in environmentally conscious behavior. Kim and Choi (2005) again found that not necessarily consumers who consider themselves as environmentally concerned purchase products environmentally positioned. Moreover, according to them ecological consumption choices are future and group-oriented. Lu, Chang and Chang (2012) found that individualism would be more likely tolerate unethical behavior; another proof of how green behavior is influenced more by social norms than by individuals' personal attitudes and beliefs.

Conforming to Schwartz *et al.* (2012), basic values are "trans-situational goals, varying in importance, that serve as guiding principles in the life of a person/group". These values are the drivers of individuals' attitudes and behaviors, thus consequently of their decision-making. Their structure depends on the coherence among psychological and social conflicts that people experience when taking everyday decisions. In his theories he organized them into a system that highpoints and helps to explain individual decision-making, attitudes and behaviors. In his previous studies he identified 10 universal values, based on one or more of three universal requirements of human existence with which people must cope, which are biological needs, social interaction, and survival and welfare needs of groups. Distinction among the 10 fundamental values is not arbitrary, and since it can be considered continuum rather than discrete they were organized in a motivational continuum partitioned in a finer set of values which would better define different shades of each value in order to have a greater universal inquisitive and predictive power (SCHWARTZ *et al.*, 2012).

Figure 3: circular motivational continuum of 19 values

Source: Schwartz *et al.*(2012)

Since personal norms may be defined as feelings of strong moral obligation to engage in altruistic or green behavior (Schwartz, 1977), this motivation continuum will be remarked in the following methodology section as means of investigation for this research.

3 METHODOLOGY

3.1 Methodological Procedures

This chapter aims to describe the methodological procedures adopted in order to perform this research. It is going to depict the aspects both of research design, data collection and analysis.

Market research can either be quantitative, qualitative or mixed. Quantitative research uses data collection in order to test hypothesis, based on numerical mediation and statistical analysis to establish standards and prove theories that can be generalized for the entire population. On the contrary, qualitative research is based on collection of observational and descriptive data with the aim to answer or improve questions in the interpretation process (SAMPIERI, COLLADO, LUCIO, 2006). As defined by Malhotra:

> Qualitative research is an unstructured exploratory research methodology based on small samples that provides insights and understanding of the problem setting (MALHOTRA, 2010, p. 139).

This type of investigation does not aim to generalize results on a probabilistic base for a wider population, and neither to obtain representative samples. The qualitative focus may be thought as a conjoint of different interpretative practices that tries to make the world more "visible" and to depict it in a series of representations under the form of observations, annotations, recordings and documents. It can either be defined as "naturalist", since it studies human beings in their daily context and habitat, and as "interpretative", because it tries to give meaning to phenomena trough the connotation that people give to them. Still according to Sampieri, Collado, Lucio (2006), qualitative research studies have an inductive characteristic, meaning that logic and processes are defined starting from the particular to end up in the general.

Qualitative research procedures may either be direct or indirect. Specifically, direct procedures are those where the purpose of the project is disclosed to the respondent, and might be performed through focus groups or depth interviews.

Methodological triangulation is an alternative able to construct coherence and cohesion in empirical research (FIGARO, 2014). It means the mixture of different qualitative methods, but can also be the combination of qualitative and quantitative methods (FLICK, 2009). In this case, different methodological perspectives are complementary to a specific analysis in order to become compensation processes that fulfill lacks left by the other typology of research (FLICK, 2009). Thus, the idea behind methodological triangulation is to use different approaches to the empirical object in order to prevent distortion due to the application of a single methodological approach (FIGARO, 2014).

An exploratory qualitative research is conducted in this study in order to ascertain the drivers that define the purchasing behavior of the target of and results are then analyzed through triangulation of primary and secondary data together with theories. The purpose is to develop an initial understanding of the underlying reasons and motivations (MALHOTRA, 2010) of the market consumers toward sustainability.

3.2 Research design

Whatever the type of research, triangulation can focus on a single case of analysis. The same people interviewed for the exploratory qualitative research might be submitted to a questionnaire, with the aim to compare and relate the answers for the same analysis. Usually questionnaire answers are going to be analyzed for the frequency and distribution of responses along the research; instead, interviews answers are analyzed and compared in order to develop a typology of behavior (FLICK, 2009). Triangulation is specifically applied to this research.

In our case, exploratory research starts with the collection of secondary data, both ready-to-use internal data of Madel S.p.a. (the company that produces Winni's) – such as Nielsen reports, previous market researches, sales overview etc. – and external data – mainly reports from Euromonitor International, Nielsen and National Geographic, together with direct market observation.

After the identification of the context of the research, primary data where collected through qualitative research, parallel to whom was conducted a smaller quantitative research via questionnaire. Qualitative research is conducted through direct, no disguised, semi-structured depth interviews by applying laddering techniques (i.e. the line of questioning proceeds from users to product's characteristics.) Questions were posed in order to disclose drivers of the purchasing process and Winni's perceptions (see APPENDIX A). Parallel with the interviews, each respondent was submitted to a Short Schwartz's Value survey in order to better understand values of the target of interest (see APPENDIX C) further analyzed following the circular motivation continuum proposed by Schwartz *et al.* (2012). Triangulation is further applied in order to deduct conclusions from data research and collection.

3.3 Data Collection

The target of interest, which is subject to the depth interviews, is composed of women of at least 20 years old in order to represent the referential consumer of laundry detergents. It can be subdivided in two different segments: conscious consumers and normal consumers.

Considering conscious consumers, 16 semi-structured depth interviews were conducted during the period of BioNat Expo, a fair of organic, ecologic and sustainable products. The 8th edition of this fair occurred in Porto Alegre from the 27th to the 29th of May 2016 in the convention center at the Barra Shopping.

Other 13 interviews were conducted on conventional consumers. Among these latters, 8 were conducted in one of the biggest supermarket of the capital, which is the Zaffari situated in the Bourbon Shopping Ipiranga. This location have been chosen not only for the size of the supermarket, but also because it is situated in a strategic point of Porto Alegre, were there is a confluence of the principal streets of the city that links the main neighborhoods, thus being easily accessible to consumers and consequently highly frequented.

The remaining 5 interviews have been conducted on a specific type of consumers, i.e. housekeepers. Indeed, according to Euromonitor International (2015) domestic workers are nearly 20 millions in Latin America, and they have a strong impact on the region's home care market.

Table 1: Interviews' list

INTERVIEWEE	SEGMENT	PLACE OF THE INTEVIEW	DATE
1	Conscious consumer	BioNat Expo	27th May 2016
2	Conscious consumer	BioNat Expo	27th May 2016
3	Conscious consumer	BioNat Expo	27th May 2016
4	Conscious consumer	BioNat Expo	27th May 2016
5	Conscious consumer	BioNat Expo	27th May 2016
6	Conscious consumer	BioNat Expo	27th May 2016
7	Conscious consumer	BioNat Expo	28th May 2016
8	Conscious consumer	BioNat Expo	28th May 2016
9	Conscious consumer	BioNat Expo	28th May 2016
10	Conscious consumer	BioNat Expo	28th May 2016
11	Conscious consumer	BioNat Expo	28th May 2016
12	Conscious consumer	BioNat Expo	28th May 2016
13	Conscious consumer	BioNat Expo	28th May 2016
14	Conscious consumer	BioNat Expo	28th May 2016
15	Conscious consumer	BioNat Expo	28th May 2016
16	Conscious consumer	BioNat Expo	28th May 2016
17	Classic consumer	Bourbon Shopping Ipiranga	7th June 2016
18	Classic consumer	Bourbon Shopping Ipiranga	7th June 2016
19	Classic consumer	Bourbon Shopping Ipiranga	7th June 2016
20	Classic consumer	Bourbon Shopping Ipiranga	7th June 2016
21	Classic consumer	Bourbon Shopping Ipiranga	7th June 2016
22	Classic consumer	Bourbon Shopping Ipiranga	7th June 2016
23	Classic consumer	Bourbon Shopping Ipiranga	7th June 2016
24	Classic consumer	Bourbon Shopping Ipiranga	7th June 2016
25	Housekeeper	Personal meeting	3rd June 2016
26	Housekeeper	Personal meeting	8th June 2016
27	Housekeeper	Personal meeting	8th June 2016
28	Housekeeper	Personal meeting	9th June 2016
29	Housekeeper	Personal meeting	10th June 2016

Source: Author

All the interviews have been conducted personally by following an interview script (see APPENDIX A). The script was developed in order to reveal each step of the purchasing process habits of consumers, and to understand consumers' perception of the brand of interest, Winni's. To analyze consumers' behavior and thus disclose the specific objectives proposed at the beginning of this work, questions have been produced following the theories explained in Chapter 2 regarding the stages of the purchasing process. Instead, in order to analyze perception of Winni's, a sample of the product has been shown to respondents at the end of the interview, together with a flyer showing the entire laundry detergent line of the brand. Due to logistic problems, a bar soap was showed, together with an empty packaging of the concentrated softener. This high selection of samples, driven by transports limitations, was done in order to give the consumer the chance to smell the product's perfume, but also to be able to read the labels, which – specifically for the concentrated format – have the characteristic to show the proper usage, a differentiation from the other products' offered in the market.

Table 2: Table of methods

	FOCUS	MEANS	THEORETICAL FRAMEWORK
Objective 1	Market Offer, Competitors	Observation and secondary research	Euromonitor International (2013, 2015, 2015), Nielsen (2015), National Geographic (2012)
Objective 2	Purchasing process and habits	Semi-structured interviews	Johnstone, Peng Tang (2014); Salomon *et al.* (2013); Burner (1986); Jacoby *et al.* (1977); Van Raaij (1977); Kotler et al. (2009)
Objective 3	Values and Attitudes	Semi-structured interviews	Schwartz *et al.* (2012); Strong (1996); Luchs*et al.* (2010); Moser (2015); Silvia (2005).
Objective 4	Winni's perspective of entrance	Observation & Semi-structured interviews	Young *et al.* (2009); Yeonshin, Sejung (2005); Lu, Chang, Chang (2012)

Source: Author

All the data collected have been then analyzed through the use of the methodology showed in Table 2, and further discussed in chapter 5.

4 WINNI'S

Image 1: Winni's marketing panel

Source: Winni's company presentation

> Winni's strength is not to give up to compromises. Home care products are studied to deeply clean the dishes, laundry and surfaces by respecting our health, that of the environment and of all the forms of life.
>
> Winnis.it

Winni's is a brand of a complete line of high quality ecological detergents, which are respectful for the environment. It is produced and distributed by Madel S.p.a. a medium sized Italian company, which operates in home and personal care sectors, and which had always distinguished itself for the attention to market changes and focus on innovation. Madel S.p.a. is one of the most interesting Italian companies in the sector of home and personal care. It is a family owned businesses, which found the perfect match between maintenance of tradition, local identity, meanwhile setting the bases for international expansion. Already present in some foreign markets, Madel S.p.a. has the necessary abilities to compete with the multinational market leaders through its fundamentals of high quality and innovation.

Since when it started in 1977, Madel S.p.a. commercial strategy is to focus on its own brands' products, which still represents 80% of the overall turnover. Nowadays, home and laundry detergents are the reference markets of the company, especially due to consumers' fidelity that for this segment is very important and which results proven for the company's brands. Personal care detergents represent around 10% of the volumes. Beside Winni's, which is the ecological line of the company, three are the other important brands of the company, Pulirapid, one of the leader products in the sector of liquid scale remover, Deox, the only full line of laundry detergents with a worldwide anti-odor patented formula, and Smacchiotutto, a concentrated stain remover very efficient even on the most stubborn stains and delicate fabrics.

Winni's is a brand of ecological detergents which are high quality and respectful for the environment. It has a complete range of products, which have a low environmental impact, characterized vegetable based actives that makes the line easily and quickly biodegradable. It is the leading Italian brand in the ecological detergents market, with over 18,4 million packs sold in Italy. Nowadays it is the sustainable leader of the cleaning market, with an incremental growth that has been confirmed along the years, as it is possible to see in Figure 4.

Figure 4: Winni's net sales in thousands

Source: Madel S.p.a.

Winni's brand in Italy has become a real lifestyle, which is concretely perceived by consumers in the market (Figure 4). This has occurred because Winni's was born and developed according to the three fundamental principles that drives all the choices, both internal and external, of the company, with the aim of creating and offering products accessible for all, safe, efficient and respectful for the environment and the human beings. These three principles are those of the triple bottom line, i.e. environmental, social and economic.

Figure 5: Italian market's research on consumers' perceptions

Source: Madel S.p.a. via Toluna Research (2015)

Environmental Sustainability, to the company it means to give back to the nature what it was previously subtracted. Thus, it is not only to substitute chemical raw materials with natural ones, but also to perform sustainable productive processes, which reduce emissions and which becomes less and less dependent from exhaustible sources. That is why all Winni's products of the line are studied to be as most compatible to the environment as possible, from the packaging to the product itself. Specifically, four are the main components of this fundamental principle:

1. Productive processes: Madel S.p.a, even if it is situated in a small town in the countryside, can boast of innovation and sustainable levels that are enviable by the

biggest competitors. Actually, warehouses are covered of 8,500 solar panels - for a total of 48.800 square meters - generating energy up to the 80% of production requirements, whereas the remaining 20% comes from certified renewable sources. Indeed, Madel S.p.a. is among the first Italian companies obtaining the "BeECO Absolutely Pure"[7] certification, which differentiates companies that use renewable sources of energy by qualifying them as environmentally aware. Moreover, plastic bottles are produced inside the company through the partnership with a local supplier, which not only eliminates transportation emissions, but it also permits to recycle the hot air used in the process to freely heat the warehouses.

2. Packaging: according to the company's principle, sustainability means also "to offer more washes at equal quantity of plastics used per packaging". That is why Winni's products are usually in "concentrated" formula with specific instruction on the label in order to understand the proper quantity that has to be used. The plastic used are recyclable and for some products they also use after-usage recycled plastic. Moreover, it is the first brand in the laundry-detergent Italian market to offer Eco-Refills, saving 80% of the plastic, and offering an economical benefit to the consumer;
3. Raw materials: each product is composed by purified water, "active" components and perfume. "Active components" are those responsible for the cleaning efficiency, and in Winni's formula they only have vegetal origins, like – for example - coconut, sugar, chicory and corn coming from agricultural waste (strictly not for alimentary usage). The perfumes are then added to make the usage a nicer experience; they use only those which have a reduced environmental impact and which are at least 90% biodegradable and without allergens.
4. Finished products: as can be obviously seen, the post-usage end of a laundry detergent is to be dispersed in water. That is why MadelS.p.a. independently performs – i.e. not obliged by law – tests in order to ensure that its products are not toxic for seaweeds, fishes and all the aquatic environment, certifying that they biodegrade as rapidly as possible (even more rapidly than how it is provided by international certifications such as Ecolabel).

Considering Social Responsibility the focus of the company is entirely on the consumer: the goal is its satisfaction, through the avoidance of footprints on the health of the

[7] *http://www.burgoenergia.it/energiagas/*

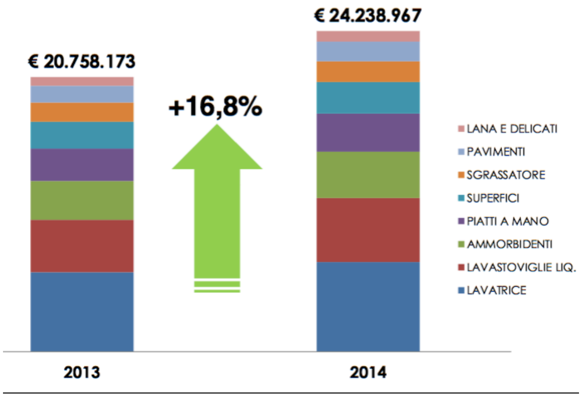
user, animals and environment. Two are the certifications that they adopted for their products. One, VeganOk, operates according to the European regulation UNI EN ISO 14021 and ensures specific ethical and environmental characteristics by controlling ingredients and animal exploitation. The other, Skineco, comes from the Ecodermatology association that rules the ecodermocompatibility of the products, evaluating the environmental impact and the skin interaction; products certified by Skineco must be sustainable in their entire production lifecycle (LCA, Life cycle Assessment) but also safe in the usage and on the skin, effective in their performance and scientifically rational. Thanks to this last certification, Winni's is the first line of products mentioning skin compatibility and health for the skin on cleaning products.

Furthermore, transparency is the second core value of the social principle; the company is always open to talk to consumer and to facilitate stream of information among the two. Direct feedbacks and communication with the consumer are a strong responsibility and necessity to them.

Finally, the Economic Principle is directly interconnected with the previous two. The goal is to offer the best price/quality relationship, because "in order to get great results, the contribution of a lot of people is needed". In here lies the concept of "ecological product democratization", which makes Winni's a high quality, low environmental impact product that does not request any trade off to consumers in order to be accessible for the most.

Winni's brand line is a complete range of product for the detergence of the house. They offer a variety of laundry, surfaces and dishes detergents, together with a line of paper products produced by apples that are entirely biodegradable. Moreover, a new toiletries line was developed coming from the base principles of the brand, which is Winni's Naturel, offering a range of products for body cleanse necessities. According to what is possible to be seen in Figure 6, the constant increase in Winni's turnover is mainly driven by laundry detergents (*lavatrice)* and softeners (*ammorbidente*).

Figure 6: Winni's sell out



Source: Madel S.p.a. via Nielsen Market Track (2014)

This drove the choice to specifically test in the interviews conducted only these two products of the brand, completely leaving behind the personal care market, where market leader such as Natura and Boticario dominate. Indeed, since the offer of ecological products it is almost inexistent – especially in market for laundry detergents – Winni's represented the ideal product in order to investigate green purchase behavior in the market of interest.

5 RESULTS

5.1 Home Care in Brazil

In 2014, sales of home care products in Brazil experienced an increase in current value growth despite the uncertainty of the economic climate (EUROMONITOR INTERNATIONAL, 2015). In this market, even if in general the trend of the top multinationals is to introduce added-value products, the ones that recorded a constant acceleration were those with basic features. Why that? According to Euromonitor International (2015), since 2007 Brazil had a favorable scenario with growth in income and employment, especially in lower classes. In 2014 55% of the population – i.e. 110 million people – were considered part of the middle class, meaning that 30 million people moved from classes D and E to class C. This movement created a new scenario, generating a totally new potential market. What occurred was that, together with this intra-class movement, 2015 experienced a strong inflation, which resulted in a reduction in consumers' disposable income. Thus, the new middle class will – in order to defend their consumption pattern – shift to different and cheaper brand and versions in order to search for convenience and efficiency. What has to be reminded is that in this type of market there is a great truth, which is the fact that consumer might want to buy cheaper products, but cannot stop consumption.

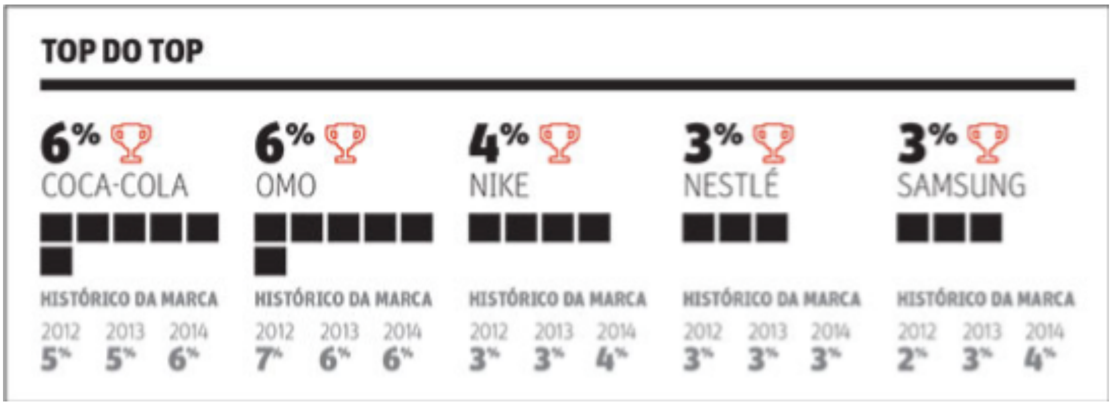
The market for home detergents in Brazil is dominated by few multinationals; indeed, even if 95% of manufacturers are micro, small, and medium sized they are active mainly at a regional level. Unilever Brasil in 2014 had 25% of value share, followed by Reckitt Benckiser (Brasil) and by two national companies, Química Amaparo and Bombril, which try to compete with price differentiation (EUROMONITOR INTERNATIONAL, 2015).

A strong price competition has been faced in the market not only due to multinational's aggressive competition, but also due to those that ABIPLA (Associação Brasileira das Industrias de Produtos de Limpeza e Afins (Brazilian Home Care Association)) refers to as "Informal Care Products" (EUROMONITOR INTERNATIONAL, 2015). This latters are products that comes from firms that operate outside the numerous security, quality and legal standards established by ANVISA (Agencia Nacional de Vigilância Sanitária (Brazilian Health Surveillance Agency)), which are sold at a lower price than those in the formal market, but with poor and dubious quality. This competition has an impact on sales of formal companies, especially on the basic products' segment for which consumers are not very demanding and goods are easily produced by informal manufacturers. This type of competition entails a loss of share for formal manufacturers, specifically for those with no recognized brands that cannot compete with these companies that have no costs such as taxes or a chemistry laboratory that guarantees quality and efficiency. On the other hand, ABIPLA, representing producers, and ANVISA, representing the government, constantly fight this type of production – even if it is incrementing - because of the risk that represent for consumers and for the unfair competition to the formal manufacturers. Additionally, the economic scenario might have an important role in this "fight" too: even if Brazilian consumers are well-known to be price-sensitive, the increase in income lead to an expansion in consumption; this, together with an increased awareness, will move their consumption from informal products to more recognized ones.

Culturally speaking, for home care market it is important to consider the influence that domestic workers have on products purchase. Over the last decade in Brazil salaries of domestic workers have risen faster than in any other job. Consequence of this new tutelage is that fewer middle-class Brazilians can afford to employ a full-time domestic worker, moving the trend to "*Diaristas*", i.e. a housekeeper that works once per week (WALKER, 2015). The key implication of this change is that Brazilians now have to do more of their household jobs by themselves that, consequently, increases the demand for multi-functional and timesaving products. What culturally changes in home care product buying behavior is that when a domestic worker was fully employed, part of his job was usually to buy/refill cleaning products. Their shopping habits would have been much more simpler, since they had more time to work, and they would buy "low-price, no-frills" products, since they would use their hand work as main resource. With this new middle-class trend, household will now start to care about products shopping themselves, focusing more on the added value that they have rather than the simplicity.

In the detergents market it is also important to remember the previous consumption habits. According to Walker (2013), in 2013 57% was the rate of washing machine penetration, indication of how much hand washing habits was still well spread. Washing by hands – which is still the norm in the poorest regions – is done by first scrubbing the clothes with a bar of soap, and then by adding powder detergent for scent. Consequence of this old habit is its continuation even after washing machines entered consumers' houses. Indeed, in Brazil almost all washing machines have a dozer that is properly created for powdering soap. A good example of how much consumption habits may influence the market is Omo by Unilever Group. When Omo first was piloted in Brazil around 2012, after a short time had to be withdrawn from shelves due to a lack of consumer interest (WALKER, 2013). Anyway, this is also an example of how fast is evolving the Brazilian market; indeed, Omo is now the first laundry care product in Brazil with 45% of value share, and positioned as one of the top recognized brands in Brazil as shown in the following figure.

Figure 7: Top of Mind brands in Brazil



Source: Folha de São Paulo (2015)

Another front-runner of the liquid formats in the Brazilian market is Procter & Gamble's Ariel. This two leading liquid soaps have to deal with the delicate passage from powder to concentrate liquid soap, which may result in a problem of dosing on consumers' behalf, and thus result in dissatisfaction (WALKER, 2013). The following table shows the first 20 laundry detergent product in the Brazilian market.

Table 3: Top brands of Brazilian laundry detergents' shares

Brand Shares (Global - Historical Owner) | Historic | Retail Value RSP | % breakdown

Brand	Company name (GBO)	2010	2011	2012	2013	2014	2015
Brazil							
Home Care							
Omo (Unilever Group)	Unilever Group	12,8	12,7	12,2	12,2	13,4	13,7
Ypê (Química Amparo Ltda)	Química Amparo Ltda	10,6	10,7	10,3	10,3	10,4	10,5
Veja (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser Group Plc (RB)	4,6	4,6	4,3	4,3	4,1	4,2
Brilhante (Unilever Group)	Unilever Group	4,8	4,5	4,2	4,0	4,2	4,1
Minuano (JBS-Friboi)	JBS-Friboi	3,1	2,9	3,2	3,2	3,2	3,2
Tide/Ariel (Procter & Gamble Co, The)	Procter & Gamble Co, The	1,7	2,1	3,0	3,8	2,9	3,1
Comfort (Unilever Group)	Unilever Group	1,8	1,9	2,1	2,3	2,2	2,3
Ace (Procter & Gamble Co, The)	Procter & Gamble Co, The	2,1	2,1	2,0	1,9	2,1	2,1
Surf (Unilever Group)	Unilever Group	2,5	2,5	2,3	2,3	2,2	2,1
Vanish (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser Group Plc (RB)	1,6	1,8	2,0	2,0	2,1	2,1
Limpol (Bombril SA)	Bombril SA	1,7	2,0	2,2	2,1	2,1	2,1
Q' Boa (Indústria Anhembi SA)	Indústria Anhembi SA	2,0	2,2	1,9	1,9	1,9	1,9
Pinho Sol (Colgate-Palmolive Co)	Colgate-Palmolive Co	1,8	1,8	1,7	1,6	1,5	1,6
Glade/Brise (SC Johnson & Son Inc)	SC Johnson & Son Inc	1,4	1,5	1,5	1,4	1,4	1,4
Mon Bijou (Bombril SA)	Bombril SA	1,0	1,0	1,2	1,3	1,4	1,4
Baby Soft (Gtex Brasil Ltda)	Gtex Brasil Ltda	-	1,0	1,3	1,3	1,3	1,2
Raid (SC Johnson & Son Inc)	SC Johnson & Son Inc	1,3	1,2	1,2	1,1	1,2	1,2
Pinho Bril (Bombril SA)	Bombril SA	0,8	0,8	0,8	0,8	0,9	0,9
Assim (JBS-Friboi)	JBS-Friboi	-	1,1	1,0	0,9	0,9	0,9
SBP (Reckitt Benckiser Group Plc (RB))	Reckitt Benckiser Group Plc (RB)	0,9	0,9	0,9	0,9	0,8	0,9

Source: Passport, Euromonitor International's gateway to global strategic intelligence

It can be stated that the Brazilian market of laundry detergents is dominated by few giant brands, which conquered their positioning in consumers' mind. Nevertheless, although this is true, at the same time it can be considered a market in motion, which is moving from traditional approaches to newer product formulations and techniques. This, together with the new market generated by the new generation of consumers, makes Brazil a responsiveness market, open to changes.

5.2 INTERVIEWS' RESULTS

The analysis of the results has been conducted in order to address specific objectives proposed at the beginning of this work. Here below you will find the question posed to the interviewees and the answers received. The first part of the semi-structured questionnaire was developed in order to disclose the purchasing process.

The first two questions posed where focused on need recognition. When it was asked which are the necessary products they buy to do their laundry all of the respondents answered that they typically use the laundry detergents, while additional products used are softeners (2,3,11,13,16,17,21,22,23,26,27,28,29), stain removers (11, 17, 21, 23, 27, 28, 29) and less frequently the solid bar soaps (3, 7, 11, 26, 29). The second question posed was how frequently did they buy laundry detergents, and it emerged that very rarely they buy less than once per month (12, 13). In general the women answered that they do this type of purchase either once per month (3, 8, 16, 21, 24) or more than once per month (9, 10, 14, 17, 19, 22, 23, 26, 28). As remarked in the secondary data collected, market for home detergents is determined by an ongoing consumption that cannot stop or slow down, but maybe move towards cheapest products offered in the market. Responses to this question were fairly equal among the different interviewees.

The subsequent questions posed were focused on information research. When it was asked "how do you get information on new/different products in the market?", most of the women interviewed answered that "*troca de informações*" i.e. word of mouth, was the main way they got informed on the validity of a laundry detergent (2,11,16,18,19,21, 22, 23, 24, 25,26, 28, 29), very few of them relied on advertisement both on journals and television (18, 28, 29), while the remaining mainly checked the information directly at the supermarket through labels comparing (3, 14) or researched information on their own (1,4,5,6,7,8,9, 12, 13 14, 15, 20, 27); there was only one respondent which affirmed she would buy what her housekeeper would tell her to (10). This, remarks theories from Jacoby *et al.* (1977) and Van Raaj (1977) according to which consumers whenever have to make a choice typically use a minor quantity of external information if the product is already known. In general, all the three segments trusted in what they already knew thanks to word of mouth and exchange of information more than on external information. Thereafter, it was asked what do they think about the market offers, and most of them resulted satisfied by the laundry detergents in the market, even if some defined the products offered as on average quite expensive, or not of very high quality (23). Among the most conscious interviewees, some were dissatisfied by the absence of ecological products in the supermarket offers (2, 4, 7, 12).

The third stage of the questionnaire concerned the evaluation of alternatives, and was particularly interesting because it gave a hint of the view that the consumers have on the market. Answers to the question “How do you choose among the offered brands?” highlighted the main drivers of consumption, which are price (2, 3, 8, 11, 15, 16,17, 18, 19, 23, 25, 27, 28), quality (2, 5, 8, 9, 14, 15, 16, 21, 22, 23, 25, 26, 27) efficiency (5, 6, 10, 20, 27), and perfume (3, 25). A remarkable attribute for product consumption was its price/quality ratio. Indeed, even if only two interviewees explicitly declared it (6, 9), it was implicit for many that a sort of saving would come from spending a little more on a product which is more effective, since it would imply less quantities used, and less frequent purchases. It was then asked if they would change the product they usually buy, and in general it emerged that the consumers are pretty loyal to the products they typically purchase, which mainly are the market leaders; only one respondent said she would change the product she is using, for a cheaper one with a better quality (28). All the segments apparently agreed on buying the best product with the lower price, even among the most conscious consumers which were those who further emerged as the more willing to pay a little more for higher quality and environmental benefits.

Then, the purchase decisions were investigated through questioning what are the products that typically the interviewee buys and in which form. It emerged that the vast majority of the consumers interviewed uses Omo (9,10, 13, 14, 16, 17, 18, 19, 21, 22, 23, 24, 25, 26, 28), followed by Brilhante (4, 2, 7, 12, 15) and others; only three respondent might be considered very conscious since they either produce or buy home-made soap, both from recycled kitchen-oil or from a mixture of sodium bicarbonate lemon and vinegar (1, 7, 15). In general, for those using common detergents, it was interesting to notice that they addressed the product used as the “market leader”, as if its positioning might be considered valid as proof for quality. These results confirmed Omo’s positioning as top-of-mind laundry brand, and market leader of the sector. Moreover, at large the powder form resulted to be the most used (3, 7, 9, 10, 11, 12, 13, 19, 22, 26, 27, 28, 29) compared to the liquid one (1, 2, 4, 6, 14, 16, 17, 18, 23), and it was interesting that from the interviewer number 10 emerged the problem of the washing machines, which apparently are not built to perform at their best with liquid soaps, thus limiting the market choices possibilities. Still, this is interconnected with the maintenance of the old habits of handmade laundry that reflects in the relatively recent penetration of washing machines.

Considering consumption, it was asked if the interviewee would differentiate the products to purchase for different necessities inside the family, and only few of them declared to purchase a different soap for babies, more delicate and natural, either for a child or a niece/nephew (2, 6, 12, 25). Then, it was asked "Where do you usually buy laundry detergents?" and it emerged that mainly respondents buy in supermarkets (3, 4, 5, 6, 8, 9, 10, 11, 12, 13, 14, 16, 17, 18, 20, 21, 22, 23, 24, 26, 28) because are considered easily accessible by everyone. Market fairs were not considered among the locations for purchase of laundry detergents since they occur rarely and on specific days; a respondent declared she would search on the Internet where she could buy the ecological product specific for her daughter in specialty stores (12). By the most part of interviewees, no matter the segment of interest, it surfaced that purchasing of laundry detergents occurs quite frequently, thus resulting more practical in supermarkets due to their easily accessible positioning and long opening hours. In the conscious segment, four respondents stand out for their highly green habits, indeed they either produce home made soap or buy it from a cooperative in "Vale do Sinos" a region belonging to the metropolitan area of Porto Alegre (1, 7, 6, 15).

Through observation it emerged that actually at the BioNat Expo there was a stand selling an ecological detergent, specifically BioWash, but seemed that it was not sufficiently advertised. Indeed, a conscious respondent - who was actually exposing ecological toiletries products - said she typically used BioWash's laundry detergent but that she had to change to a normal brand since when she could not find it in supermarkets anymore; it was uncommon that she did not know that the same product was sold two stand after hers. Moreover, the price was far from the average market offer: 23 BRL for the 500ml laundry detergent, 45 BRL for 1liter.

For the stage of post-purchase evaluation it was asked if she would remember to have bought a product that dissatisfied her expectations, and while many of them did not have any particular memory to report, few of them said that it occurred, and that it was specifically related to the efficacy and to the smell/perfume left on the fabrics (5, 15, 26, 21), while one respondent said she was dissatisfied by a liquid soap since it did not produced enough foam, which to her is sign of efficiency (28).

The last stage of the purchasing product is the after usage disposal, and it was questioned to the interviewers what do they do with the packaging after usage, and if they do recycle the waste. Most of the respondents said they do separate the waste among "*lixo seco"*(recyclable waste) and *"lixo organico*" (organic waste), or either due to specific rules of the condominium (2, 4, 10, 12, 13, 15, 17, 18, 20, 21, 24, 25, 26, 28, 29). It was interesting that from conversation with respondent number 2 it emerged distrust toward the recycling system in Porto Alegre, which legitimates the bad habits of most of the population to not properly separate the waste. Broadly, even if the interviewee entered in the conscious consumers' segment, recycling was a theme that was not deepened by anyone, probably due to its general malfunctioning.

At this point of the interview, an additive question was posed only to interviewees 25, 26, 27, 28 and 29, that is the housekeepers. To the interviewee it was questioned whether she was actively involved in the purchasing process of the workplace, and whether or how it occurs differently from the one she described as her personal purchasing path. All of them have been identified as user and influencer of the products, since they typically suggest the product that have to be bought, indicating type, brand and form; in general, the buyer itself, thus who commits the final choice, remains their superior.

The second part of the questionnaire was indeed built in order to infer attitudes toward green consumption and toward the perception of the Winni's brand of laundry detergent. At first, it was asked whether they already heard about ecological laundry detergents and softeners, and while most of the respondents answered negatively (2,5,6,8,19,23,24,25,28,29), few of them said that they "already heard of them" (3, 11, 14, 17, 21, 26, 27), while others said a little more specifically that there are some ecological products offered in the market but which are not accessible either due to the high price (9, 13) or to the physical difficulty to find them (4, 12, 16, 20). Instead, few respondents referred to have heard of ecological home-made produced laundry detergents - which are those currently used by interviewed 1, 7 and 15 - but which never had enough time and effort to start producing/buying them (10, 22).

Progressively, it was asked which were the adjectives that the respondent would associate with an ecological laundry detergent, and the vast majority declared they would associated the idea of being sustainable, not harming the environment and preserving nature (1,2,3,4,5,6,7,9,10,11,12,13,15,17,18,19,20,21,22,24,25,26,27,28), other respondents characterized and ecological laundry detergent as an effective product which does not harms fabrics due to less chemicals (8, 11, 14, 16, 23, 29) while only two respondents resulted a little more conscious and referred that an ecological product should not only preserve the environment, but also be produced through a green production chain and triple bottom line (7, 12). Being environmental was an adjective strictly interconnected with being sustainable and organic, clearly without a well-defined differentiation among the three in the mind of interviewees.

Therefore, it was presented the sample of the Winni's product. After giving some time to the interviewee, it was asked if the consumer would be interested in buying it, and all of them said that would be great to have it among the offered choices at the supermarket, specifically some were very interested by the brand's certifications (7, 12, 15, 24), considered a rare differentiation point.

Successively, it was asked how much would they pay for a product with such characteristics, in order to infer how much the willingness to pay influences the consumer choices toward a green purchasing behavior. In general, it was interesting to notice that the interviewees were quite conscious on an eventual higher price due of an ecological product. Indeed, while some of them would be willing to pay 20-30% more than the average price offered in the market[8] (8, 10, 13, 14, 18, 19, 21, 22, 29), some others would be willing to pay an even higher price, around 14-25 Real (1, 2, 4, 5, 6, 9, 12). On the contrary, while some respondents agreed on the necessity of an ecological product to be sold at the same price level of the ones already offered in the market (3, 16, 17, 20, 24, 25, 26), very few commented that it should be sold at an even cheaper price (11, 27, 28) in order to encourage people to address this type of product. It was then asked if they would trust a product with such differentiation sold in supermarkets rather than in specialty fairies, and 100% of the respondents said that they would, especially due to the difficulties and efforts that mean go to an ecological fairies on the specific days they are organized.

[8]Considered as average price per Kg 8 BRL.

What has been interesting was that when the women were observing the sample of Winni's, the majority of them seemed impressed by the perfume of the solid soap, characteristics which emerged to be fundamental in the purchase decision process. Many were the comments on the perfume, among which: "*Nossa que cheirinho bom!*" ("Oh my goodness what a good smell"), "*Gostosinho, né?*" ("Tasty, isn't it?") and "*Que delicia!*" ("Delicious!").

From the interviews it emerged that environmental impact on a daily basis it is still far from being the consumers' priority. Even among the most conscious consumers, if some were distancing themselves from the classic purchases was not exactly for environmental issues but more for a short-term view of the repercussions that some products may have on the health of the users. In the market of interest, very few are the brands of laundry detergents that can be considered natural and/or ecological. Indeed, beside the brand BioWash that was encountered at the BioNat Expo fair, through observation in the supermarket it was possible to find only another laundry detergent, which might be considered ecological, which is Amazon H2O[9]. This product, among others which clearly adopt green washing on their labels (for example Ace Naturals, which present a green and apparently ecological label, with the statement "(…) with natural extracts" but without any further proof of evidence), is the only one that declares to use biodegradable surfactants, together with a less production of foam, a fast decomposition of 21 days and OXO-biodegradable packaging that deteriorates in two years rather than three hundreds as normal plastic would. On the other side, no certifications are cited (not even in the official website) as proof evidence of the ecofriendly claim of this brand. Amazon H2O is sold at a price 9,79 BRL per 1 Kg of powder detergent, which, even if it is a price not significantly higher than the market leader, represents a trade-off for the consumers that has to buy 1 kg at time differently from the other packaging forms (e.g. Omo 2 Kg is sold for 16,09 BRL, Brilianthe liquid 3l is sold for 23,90 BRL, whit the possibility to buy refill for 7,90 BRL), and specifically address the research for this specific product (which can be found in the last meter of the shelves dedicated to laundry detergent, and in the lower raw).

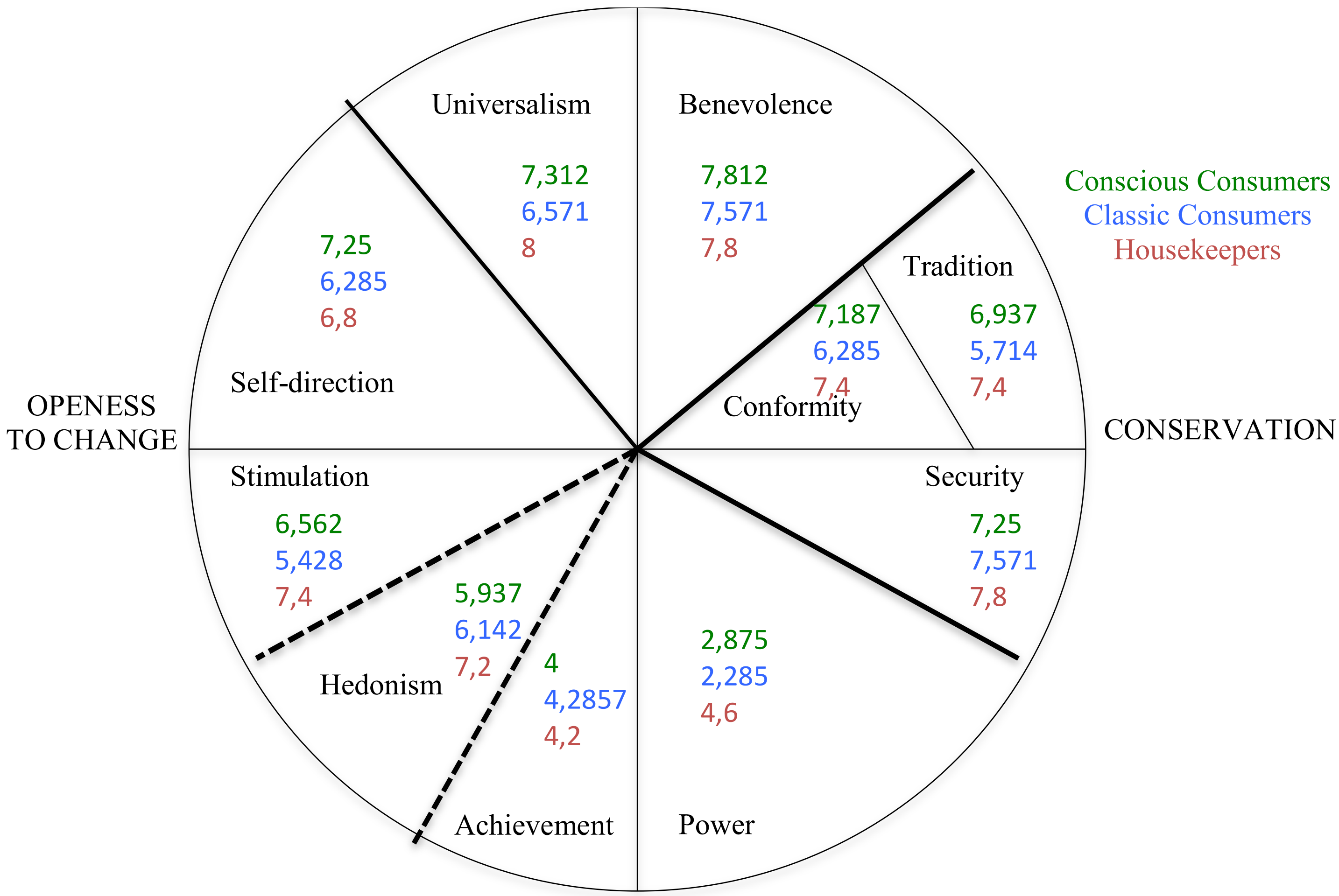
Still, it is interesting to notice that due to the lack of ecological offers, the few consumers which are deeply environmentally conscious are willing to engage in big efforts in order to maintain their attitudes toward green consumption, either managing to search for

[9]http://www.gtexbrasil.com.br/index.php/amazon

specific places where to buy the products or to produce them homely. The others, even if define themselves as aware, still reminds the theories early described in this work which state that willingness to pay, together with quality perception and personal efforts still are a strong influence on the consumer behavior which results in the attitudes-behavior gap.

Parallel with the semi-structured interview, it was asked to the interviewee to fill a short version of the Schwartz Values Survey in order to infer if there is a direct connection among the personal values and the consumer behavior toward ecological laundry detergents. Figure 8 shows the results with the averages of each value for the three segments of this research.

Figure 8: Values averages per segment of interest



Source: Author, via the Short Schwartz Values Survey

SELF-ENHANCEMENT

Two are the dimensions that can be comprehended from the circular motivational continuum above presented. The first regards the trade-off between conservation and openness to change. It regards the conflict between the reasons behind the maintenance of the status quo together with the certainty that conformity norms can provide and the motivations to follow personal intellectual and emotional interests. In this dimension, results are quietly equal; only for housekeeper seems that conservation has a slightly higher weight. It is surprising that the segment of conscious consumers, which are pioneers in terms of ecological approach, do not seem significantly open to change, on the contrary the high values of conformity may reflect the attachment that the interviewees showed toward the market leaders as universally considered the best offer in the market. Another interesting data is that self-direction is higher for the conscious segment. This reflects the theory of Miniero *et al.* (2014) on how regulatory focus might influence sense of duty toward environmentalism. The second dimension, indeed, is represented by the trade-off among self-transcendence and self-enhancement, and relates to the conflict respectively between concerning of other people's welfare versus the individual's outcomes and personal interests. It is interesting how self-transcendence, which reflects concern about others, even if it is higher for all the three segments with respect to self-enhancement, for the conscious consumers' the gap among the two dimensions is higher, reflecting an higher concern for collectivism.

Unfortunately, data collected may reflect some bias. Firs of all, there are a difference in the number of interview collected among the different segment. It should also be taken in consideration that interviews, thus quantitative Short Schwartz Values survey too, were done in person, thus submitting the interviewee to a possible pressure to alter the answers and the marked values in order to better fit the idea of a universally good person (for example, only three respondent marked the value "power" higher than 5 in a scale from 0 to 8).

6 CONCLUSIONS

The general objective of this work was to analyze the market in Porto Alegre toward a sustainable laundry detergent. This had uncovered two different types of consumers, which both would be open to the entrance – and consequent consideration - of a product with ecological characteristic in the market. On one hand, conscious consumers who can also be identified with the cluster of Lifestyle of Health and Sustainability (SOLOMON *et al.* 2013), those people who buy organic foods and are more open to engage in efforts in order to pursue a greener, and healthier, life. On the other, classic consumers, which recognize the mediocrity of the quality and of the differentiation of the laundry detergents offered in the market, and who would be opened to the introduction of a product that will not only respect the environment – which to them is almost a secondary aspect– but that would ensure through certifications the respect for the human-being and the fabrics with which it would enter in contact.

The offer of laundry detergents in the market resulted to be dominated by few powerful market leaders, which already gained consumers' loyalty, mainly due to the lack of proper competition and differentiation. Omo laundry detergent resulted to be the most used product by interviewees, together with Ypè and Comfort as brands of softeners. This redirects to the purchasing process of the classic consumers whom, due to easy and timesaving accessibility, together with medium prices and a quality universally recognized as good, remain loyal to the most known brands, and even become sluggish in changing for the better. On the contrary, those very few consumers who would like to behave environmentally and make different choices from the mass have no other option than either pay very high prices for a low-quality detergent, or self-produce their own laundry detergent from natural raw materials. Unfortunately, what emerged from this research is a proof of the model of consumer's green perception proposed by Johnston and Tang (2014, p.322). Indeed, not only interviewees clearly defined that there is a difficulty in being consumers of a green laundry detergent due to external factors such as the lack of easy availability and higher prices, but there is also a misperception on the low efficacy of the natural products, which should "evolve their formulations in order to be effective," (cit. interviewee number 14). Moreover, as long as their laundries are perfectly clean, and the product they bought worked properly, it is difficult for a consumer to see the direct negative effects of a non-green behavior.

When Winni's samples were presented to women, their reaction was surprisingly cheerful and positive. They all were amused by the smell of the bar soap, and sorry to not have the chance to smell the softener too. Most of them resulted happy that the product was certified for its ecological components and for SkinEco certification. Clearly, the Brazilian market finds itself at a different level than the Italian one, not only from a product offer point of view, but also from the usage and the users – remember that housekeeper are still strong influencers of the purchase and a high percentage of users. By the way, even though habits of consumption of laundry detergents are different, the Brazilian consumers resulted to be more or less in line with the thoughts of the Italian consumers, with the same perception of a green product in this type of market. Indeed, the discernment of an ecological product is not enough well established in Brazilians consumers' mind in order to face a trade-off implying any higher effort. That is why the democratization of the green detergent proposed in Italy by the brand Winni's would be a winning strategy also in the Brazilian market. The idea of a high quality product with the same average price of the market would be a winning strategy to access the Brazilians consumers.

The best way of entry that would raise the quality perception of the product would be direct importing from Italy, due to the low reliability that consumers have on Brazilian's companies, opposite to the good perception of foreign brands. Another possible path would be to start a production in the Country, but through the maintenance of indisputable certifications and quality levels. Both of these two pathways would involve costs whose analysis was not included as objective of this research in order to not result in superficial and wrong predicted data.

In the end, it would be remarkable to report that later in the development of this dissertation it was possible to enter in contact with Dr. Mark A. Weiss, chairman and CEO at Global Urban Development, who is working on a project called *Zona de Inovação Sustentável* (Sustainable Innovation Zone) which aims at transforming the state of Rio Grande do Sul (of which Porto Alegre is the capital) the most sustainable state in Latin America before 2030. This change would be done trough the spread of words and the efforts of volunteers, and would generate a new knowledge about the sustainability imperative, making this area the perfect door into the Brazilian market for a product like Winni's.

6.1 Theoretical and practical implications

This research widened the theoretical spectrum on ecological consumers in the market of Porto Alegre to a field that was not inferred yet. As remarked in the first part of this work, theoretical background on Brazilian green consumers is mainly concentrated in organic food consumption, thus this helped to discover the openness to green product offer in another consumption decision which is involved in daily lives of consumers. Moreover, it is an attempt to exhibit an overview on a market which may represent those of entrance of a foreign entrepreneur, not only for Winni's brand. The average middle-class consumer of Porto Alegre was analyzed along the steps of its purchasing process, depicting the average consumption habits of the market.

6.2 Limitations and suggestions for future research

The first limitations that were encountered were in implementing and carrying out the research itself. Due to personal communication barriers in Portuguese language and lack of previous experience in field research, it was necessary to run few pre-test interviews in order to prove validity and effectiveness of the proposed questionnaire.

Another limitation is related to the generalization of results. Due to the limited amount of time available, it was conducted an exploratory qualitative research on a relatively small number of consumers. This, even if gave the chance to describe the market of Porto Alegre, may result in a restricted segment of interest in order to correctly define average consumption behaviors in a market, especially because the interviewees addressed represented the a part of the consumers which have access either to specialized fairs and to higher quality supermarkets such as those of the Zaffari chain.

Moreover, due to the vastness of the country, what was inferred through this research and its conclusions may not be applied to other different socio-economic and cultural contexts of Brazil. Would thus be enhancing to investigate the same objectives in other capitals of the country.

It would also be interesting to do a deeper comparative study of the qualitative results with the 19-values Schwartz model (2012), in order to better and deepen understand drivers of consumption and personal values of the segment of interest. Indeed, the choice of the short version of the model was related both to the lack of time and to the direct approach with the interviewees, which impeded to ask them to fulfill a more detailed and longer questionnaire.

In the end, beside the limitations above presented, it can be stated that this work enhanced knowledge on the consumption of ecological products, specifically laundry detergents, opening a new path for further researches which will infer green consumption beyond the market of laundry detergents.

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APPENDIX – A

UFRGS
PPGA
ENTREVISTAS COM OS CONSUMIDORES

Processo de Compra:

- Reconhecimento da necessidade
  - Quais são os produtos necessários que você comprar para fazer sua roupa precisa de reconhecimento?
  - Quantas vezes você compra seus detergentes para a roupa por mês?
- Pesquisa de informações
  - como você obter informações sobre novas/diferentes produtos no mercado?
  - O que acha sobre as opções disponíveis no mercado? Como você descreveria-los? Por favor, fale sobre detergentes (sabão) e amaciadores de sua preferência. (exe.: preço, qualidade, embalagem (1 kg? 1 litro? Concentrado ou não? Especial para roupas coloridas? Especial para o bebê? Menos alérgenos, mais neutros?)
- Avaliação de alternativas
  - Como você escolhe entre as marcas oferecidas?
  - Você mudaria os produtos você normalmente usar/comprar? O que faz você escolher um produto diferente?
- As decisões de compra
  - Qual o formato de detergente para a roupa você geralmente compra: pó, sólido, líquido ou concentrado?
- Consumo
  - Você usa os mesmos produtos para toda a família?
  - Onde você geralmente compra os detergentes para a roupa?
- Avaliação pós-compra
  - Lembra – se houver qualquer caso, quando você comprou um produto, mas isso não satisfazer suas expectativas – de que você estava insatisfeito?
- Descarte
  - Que você faz com o pacote quando o produto estiver terminado?
  - Você faz coleta seletiva em sua casa?

(Somente para as Diaristas:

- Você tem parte do processo de compra no lugar onde você trabalha?
- Qual sou as diferencias – se presentes- na escolha dos produtos?)

Consumo verdes/atitudes:

- Já ouviu sobre amaciantes e detergentes para roupa ecológica/verde/natural? Por favor, explique o que ouviu falar sobre isso.
- Que adjetivos você associaria com um produto de roupa ecológico?

Após a explicação das características e vantagens competitivas do Winni's e a mostra do sabão e do solido:

- Você estaria disposto a comprá-lo? Sabão e amaciante
- Qual é o preço máximo que você pagaria por esses produtos? Onde esperava encontrá-lo?
- Você consideraria confiável comprar um detergente ecológico no supermercado? Se não, explique.

APPENDIX – B

UFRGS
PPGA
INTERVIEWS WITH CONSUMERS

Purchasing Process:

1. Need recognition
   - What are the necessary products you buy to do your laundry?
   - How many times do you buy your laundry detergents per month?
2. Information research
   - How do you get information about new/different laundry products in the market?
   - What do you think about the options available in the market? How would you describe them? Please talk about detergents (soap) and softeners of your preference. (ex: Price, quality, packaging (1 kg? 1 liter? Concentrated or not? Special for colored clothes? Special for baby? Less allergens, more neutral?)
3. Evaluation of alternatives
   - How do you choose among the offered brands?
   - Would you change the products you typically use/buy?
   - What would make you choose a different product?
4. Purchase decisions
   - There is a characteristic that you would consider determinant in your purchasing choice of laundry products?
   - Which format of laundry detergent do you usually buy: powder, solid, liquid or concentrated?
5. Consumption
   - Do you use the same products for the whole family?
   - Where do you usually buy your laundry detergents?
6. Post-purchase evaluation
   - Do you remember – if there is any case when you bought a product, but it didn’t satisfy your expectation – from what you were dissatisfied?
7. Disposal

- What do you do with the package when the product is finished? Do you do selective collection in your household?
- Do you typically recycle in your home?

(Only for housekeepers:

- Do you take part of the purchasing process for laundry detergents at your workplace?
- What are the differences – if any – in products' choices?)

Green Consumption/Attitudes:

- Have you ever heard about ecological/green/natural laundry detergents and softeners? Please explain what have you heard about it.
- Which adjectives would you associate with an ecological laundry product?

After the explanation of Winni's characteristics and competitive advantages by showing softener's package and solid soap:

- Would you be willing to buy it? Soap and softener.
- Which is the maximum price you would pay for such products?
- Where would you expect to find it?
- Would you consider trustworthy to buy an ecological laundry detergent at the supermarket? If not, explain.

APPENDIX – C

Questionário breve dos Valores de Schwartz

Instruções: Por favor, classifique a importância dos seguintes valores como princípios na sua vida. Use a escala de 8 pontos em que 0 indica que o valor é contra seus princípios, 1 indica que o valor não é importante para você, 4 indica que o valore é importante, e 8 indica que o valor é muito importante para você.

	Oposto a os meus princípios	Não Importante			Importante				Muito importante
1. PODER (poder social, autoridade, riqueza)	0	1	2	3	4	5	6	7	8
2. REALIZAÇÃO (sucesso, ambição, influência sobre as pessoas e eventos)	0	1	2	3	4	5	6	7	8
3. HEDONISMO (realização dos desejos, prazer na vida)	0	1	2	3	4	5	6	7	8
4. ESTÍMULO (ousadia, uma vida variada e desafiadora, uma vida empolgante)	0	1	2	3	4	5	6	7	8
5. AUTO-DIREÇÃO (criatividade, liberdade, curiosidade, independência, escolha de suas próprias metas)	0	1	2	3	4	5	6	7	8
6. UNIVERSALISMO (mente aberta, beleza da natureza e das artes, justiça social, mundo em paz, igualdade, sabedoria, unidade com a natureza, proteção do ambiente)	0	1	2	3	4	5	6	7	8
7. BENEVOLÊNCIA (honestidade, perdão, lealdade, responsabilidade)	0	1	2	3	4	5	6	7	8
8. TRADIÇÃO (respeito pela tradição, humildade, aceitar seu papel na vida, devoção, modéstia)	0	1	2	3	4	5	6	7	8

9. CONFORMIDADE (obediência, honrar os pais e os mais velhos, autodisciplina, educação)	0	1	2	3	4	5	6	7	8
10. SEGURANÇA (segurança nacional, segurança da família, ordem social, limpeza)	0	1	2	3	4	5	6	7	8

APPENDIX – D

THE SHORT SCHWARTZ'S VALUE SURVEY

Instructions:
Please, rate the importance of the following values as a life-guiding principle for you. Use the 8-point scale in which 0 indicates that the value is opposed to your principles, 1 indicates that the values is not important for you, 4 indicates that the values is important, and 8 indicates that the value is of supreme importance for you.
The scale:

	Opposed to my principles	Not important			Important				Of supreme importance
1. POWER (social power, authority, wealth)	0	1	2	3	4	5	6	7	8
2. ACHIEVEMENT (success, capability, ambition, influence on people and events)	0	1	2	3	4	5	6	7	8
3. HEDONISM (gratification of desires, enjoyment in life, self-indulgence)	0	1	2	3	4	5	6	7	8
4. STIMULATION (daring, a varied and challenging life, an exciting life)	0	1	2	3	4	5	6	7	8
5. SELF-DIRECTION (creativity, freedom, curiosity, independence, choosing one's own goals)	0	1	2	3	4	5	6	7	8
6. UNIVERSALISM (broad-mindedness, beauty of nature and arts, social justice, a world at peace, equality, wisdom, unity with nature, environmental protection)	0	1	2	3	4	5	6	7	8
7. BENEVOLENCE (helpfulness, honesty, forgiveness, loyalty, responsibility)	0	1	2	3	4	5	6	7	8
8. TRADITION (respect for tradition, humbleness, accepting one's portion in life, devotion, modesty)	0	1	2	3	4	5	6	7	8

9. CONFORMITY (obedience, honoring parents and elders, self-discipline, politeness)	0	1	2	3	4	5	6	7	8
10. SECURITY (national security, family security, social order, cleanliness, reciprocation of favors)	0	1	2	3	4	5	6	7	8