

Revisiting the social rules of Christmas gift-giving: a study in southern Brazil

Revisitando as regras sociais do presentear no Natal: um estudo no sul do Brasil

Olga Maria Coutinho Pépece¹ 

Huallady Amantino Bitencourt de Proença¹ 

ABSTRACT: *Based on the nine rules of American Christmas gift-giving, this study revisits them 40 years later and in another culture. A qualitative approach was used, through interviews, documentary research and participant observation, with thematic analysis. Changes were observed in Americans' gift-giving rules, assumed by the subjects during the Christmas period, regarding distribution and decoration. New rituals were also identified in the rules of reciprocity, tree, packaging and scale. The rules of dinner, selection and adequacy supported the original context.*

Keywords: *gift-giving; Christmas; social rules.*

¹Universidade Estadual de Maringá – Maringá (PR), Brazil.

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RESUMO: Com base nas nove regras de presentear no Natal americano, este estudo as revisita 40 anos mais tarde e em outra cultura. Utilizou-se a abordagem qualitativa, por meio de entrevistas, pesquisa documental e observação participante, com análise temática. Verificou-se mudanças nas regras de presentear dos norte-americanos, assumidas pelos sujeitos no período natalino, sobre a distribuição e a decoração. Também se identificou novos rituais nas regras de reciprocidade, árvore, embalagem e escala. Já as regras de jantar, seleção e adequação sustentaram o contexto original.

Palavras-chave: ato de presentear; Natal; regras sociais.

Introduction

The act of giving presents constitutes a representation of relationships built through meanings that encompass identities, messages, experiences, reactions, positions, status, and intimacies (BELK, 1979). Christmas is one of the few most intense and well-defined ceremonies around the world (ROOK, 2007), celebrated even in countries that do not have a Christian tradition (MCKECHNIE; TYNAN, 2006), and one of its most distinctive features is the exchange of gifts.

Gift exchanges can trigger social rules that represent regulatory modes of interaction among individuals, focusing on specific attitudes toward acting in a given context (GIDDENS, 1976). These rules are informal and predictable mechanisms of behavior that come into play on particular occasions and govern the offering of gifts (CAPLOW, 1984; MORTELMANS; SINARDET, 2004). Such rules may include: to whom to give, what to give, when to give, or how to give gifts.

At Christmas, Caplow (1984) identified premises related to gift exchanges in the city of Middletown during the 1980s, observing a family context. The author attributed the terminology of socially produced “rules”, which are: reciprocity, tree, decoration, packaging, scale, selection, appropriateness, dinner, and distribution. The rule of reciprocity says that participants in this gift-giving system must give at least one Christmas present every year to their mothers, fathers, children, daughters; to the spouses of these people; and to their own spouses (CAPLOW, 1984).

The tree rule is a major symbol of the Christmas ceremony. Couples with children of any age must set up Christmas trees in their homes; single people without children are not required to set up trees; and single parents may set up trees. The decoration rule indicates that any room or environment where Christmas presents are distributed must be decorated with Christmas emblems (CAPLOW, 1984). Caplow (1984) also shows that the rule of Christmas-themed packaging gives these items individuality and sociability.

The scale rule establishes that the amount to be spent on the acquisition of an item depends on the emotional distance of the relationship between the dyad (CAPLOW, 1984). Christmas gifts should also demonstrate the giver's familiarity with the recipient and surprise them by expressing affection through the aesthetic or practical value of the gift, forming the selection rule (CAPLOW, 1984).

Consequently, the rule of appropriateness of gifts, in relation to monetary offers, suggests that some relationships become unsuitable for this type of offering. Twenty years after Caplow's (1984) work, Mortelmans and Sinardet (2004) indicated that this rule was spread by the market movement through the creation of colored envelopes or cards that could better justify such offers.

Finally, Caplow (1984) addresses the rules of dinner and distribution, which systematize that gifts should be exchanged and distributed at gatherings where meals are served, with the presence of family being essential, and that each person who gives a gift should receive another in return.

What motivates the investigation of the rules involved in the act of gift-giving related to Christmas is the fact that market actions also participate as structuring elements of consumption, learned through sociocultural patterns. When contexts and structures become unstable due to new realities over time, it leads to changes in behaviors, practices, and meanings (ARNOULD; THOMPSON, 2005). Although some studies have shown the ritual and exchange of Christmas gifts in Brazil (CASOTTI; CAMPOS; WALTHER, 2008; OLIVEIRA; VIEIRA, 2010; PINTO; CRUZ, 2014), none of them have depicted the rules that govern the act of gift-giving in other cultures.

Revisiting Caplow's (1984) rules, 40 years later, is essential to recognize the traditions of the act of gift-giving that are widely spread in the West but are also intrinsic to the culture of specific spaces and ways of life. Customs and typologies of presents may be lost — or their practices may fade — yet the act of giving remains intense, universal, and present in societies (SHERRY, 1983; PILLAI; KRISHNAKUMAR, 2019), as consumers resignify artifacts and symbols (ARNOULD; THOMPSON, 2005).

Ritualistic consumption at christmas

The literature addresses consumption rituals through different lenses: rituals expressed as aspects of the sacred (BELK; WALLENDORF; SHERRY, 1989), rituals viewed as behavioral traits (TETREAULT; KLEINE III, 1990; ROOK, 2007), and rituals constituted by symbolic actions (MCCRACKEN, 1986; ARNOULD; THOMPSON, 2005; 2007). Celebrating Christmas in different regions of the world involves artifacts influenced by local culture, such as the American Santa Claus, the British Christmas card, the Dutch Christmas cookie, and the German Christmas tree (BELK, 1989). This cultural appropriation of elements is heavily shaped by cultural globalization.

Christmas provides one of the most widespread ritualistic consumption practices in the world. The ceremony expresses consumers' self-concept, connecting them and strengthening their social relationships (WALLENDORF; ARNOULD, 1991) through sharing joy, peace, and kindness as valuable feelings (HIRSCHMAN; LABARBERA, 1989). In this context, consumers value a flow of fantasies, emotions, entertainment, and triggers of memories (HOLBROOK; HIRSCHMAN, 1982). These emotions accentuate the symbolic attributes of the act of giving, in which some individuals find pleasure in giving many presents (CAPLOW, 1984).

There is a significant relationship between religious values and commercial intent (CLARKE, 2006), in which the predominance of spiritual and social meanings is the central foundations for aspects of consumption and their particularities in various contexts. In this context, the process of meaning transfer during Christmas identified by McKechnie and Tynan (2006) encompasses both collective and individual ritualistic behaviors. Generally, consumers' collective behaviors include participation in nativity scenes, concerts, church visits, and social activities, as well as gatherings for family dinners. Individual consumption behaviors are related to routine household

cleaning, decoration and redecorating, purchasing Christmas trees, installing outdoor and indoor lighting, and buying presents — acts heavily influenced by advertising and fashion systems (MCKECHNIE; TYNAN, 2006).

Consumption at Christmas has shown relatively significant aspects, particularly in the increased consumption of food, beverages, and gifts. In Brazil, researchers like Pinto and Cruz (2014) highlight the association with positive attitudes and values connected to religious ideologies, especially Christian ones, viewing it as an opportunity to practice acts of solidarity, fraternity, and benevolence. These feelings are more common among consumers of older ages (PINTO; CRUZ, 2014).

The presence of the celebration of the “midnight mass”, the setting up of nativity scenes depicting the birth of Jesus, and the novenas emphasize a significant part of the religious culture in Brazilian Christmas, involving a whole array of symbols that allow for the construction of meanings through decorations, lights, Santa Claus, Christmas trees, traditional foods served at the Christmas meal with family, Christmas songs, and more (PINTO; CRUZ, 2014). This multisensory experience enhances an anthropomorphizing process, attributing individuality and symbolic universes to consumers.

When Caplow and Williamson (1980) compare gift exchanges between Easter and Christmas, they observe that Christmas presents greater complexity, as there is not a single type of gift or modes of giving and consuming them. Instead, it involves criteria such as age group, gender, status, social class, identity, lifestyle, and intimacy between givers and receivers (CAPLOW, WILLIAMSON, 1980; SHERRY, 1983; CARRIER, 2005; AUNG; ZHANG; TENG, 2017).

Therefore, buying Christmas presents is almost a social obligation for close family members, although consumers may encode how broad their groups can be (MCKECHNIE; TYNAN, 2006). Caplow (1982) emphasizes that the main goal of giving Christmas gifts is to build solidarity and kinship bonds.

Gift-giving rules system

Gifts symbolize a kind of “photograph” in which people invoke in their minds the other person, aiming to convey messages or meanings (SCHWARTZ, 1967), in rituals that emphasize symbolic exchange, such as Christmas (CAPLOW, 1982; 1984). Thus, “gifts are not as sacred as the connections between the people they usually signify” (BELK, 1979, p. 18, our translation).

The processes involved in the procedures of gift-giving are detected by invisible rules that function as a kind of governance (etiquette) of consumer behaviors within the ritual (CAPLOW, 1984). Thus, Caplow (1984) demonstrated that the gift exchange system during Christmas is heavily based on practices supported by rules, whose behaviors are grounded in a dialect of sedimented meanings. Evaluating the system of gift rules, Caplow (1984) understands that rules are not recognized by the system’s participants, although they may be observed in use, since instructions for giving Christmas presents are not found in regulations or etiquette books but are tacitly embedded in society.

The loosening of social rules would turn everyday life into chaos regarding the (in)adequacies of different situations encountered. Therefore, a minimum level of regulation is necessary, not only for the functioning of society as a whole but also for various areas of social life (MORTELMANS; SINARDET, 2004), among which gift-giving is one, coercing consumers to act with a sense of collectivity.

Caplow (1984) interprets that every culture has a language of gift-giving to express important interpersonal relationships on special occasions. However, these rules are socially internalized through families, actively participating in the socialization process (MORTELMANS; SINARDET, 2004), whose structure of meanings associated with gifts is accumulated over time but also subject to change as these gifts — and their meanings — circulate among different consumers. Hendry (2008) urges that every gift exchange should be carefully examined, as rules and conventions are always involved, such as knowing when it is appropriate to give presents and to whom, as well as understanding how valuable

these gifts should be and how they should be received — along with how and when they should be reciprocated.

Thus, the invisible rules governing the gift system (CAPLOW, 1984; REITSMA; HOVEN, 2017) reconcile an inherently programmed network of actions among consumers, as the configurations of these rules are aligned with a ritual occasion that includes specific elements and promotes mutual coherence between givers and recipients. That said, at least three macro rules can be identified in the ritual: the social agents involved, the artifacts such as gifts, and the exchange environment (MORTELMANS; SINARDET, 2004).

Methodological design

This research was conducted using a qualitative and descriptive approach. The data sources were characterized as primary. The selection of participants was based on recommendations and three criteria: a) being Brazilian and residing in Southern Brazil; b) celebrating Christmas; and c) having the habit of giving gifts. Thus, 12 participants were selected, including 7 women and 5 men, aged between 25 and 60 years, belonging to the lower middle class, with a predominantly Christian religion. Data collection was performed through triangulation: in-depth interviews, documentary research, and participant observation.

The interviews were conducted using semi-structured guides in two phases, totaling 24 interviews. The interviews were carried out online due to the COVID-19 pandemic context. The two-phase approach aimed to identify practices that could be considered atypical due to the pandemic. The first phase included questions related to participants' experiences during Christmas in the last three years (2018, 2019, and 2020), whereas the second phase investigated the more recent Christmas of 2021.

Between both phases of interviews, the researcher asked participants to take photographs and videos of certain aspects of their Christmas 2021. Additionally, they provided some guidelines to help facilitate access to specific materials.

Participant observation was also conducted within the researcher's family context. This method had the advantage of being highly specific to the researcher's culture and the individuals present, providing an opportunity for in-depth data collection because the researcher is not a "stranger". As a record-keeping tool, field diaries were maintained to document observations made at the sites, along with photographs and videos. The researcher spent 21 days in the field observing the practices of a group of 30 family members, following a participant observation guide.

For the interpretation and analysis of the data, thematic analysis was used. This method allowed for classifying and categorizing the content, highlighting key elements so they could be compared with other elements (BARDIN, 2016; CARLOMAGNO; ROCHA, 2016). According to Cavalcante, Calixto, and Pinheiro (2014), this technique involves breaking down texts into units (categories) and reassembling them through analytical re-groupings, with the purpose of discovering the core meanings that make up the messages, which in turn were already pre-established by theory, namely, Caplow's nine rules.

The researcher used 266 pages of transcribed texts from in-depth interviews, with a total duration of 21 hours and 37 minutes, along with 143 photographs and 21 videos. Additionally, 28 pages were written in the field diary as a result of participant observation; moreover, the researcher collected 306 photographs and 17 videos during the observation period. Finally, a comparative analysis was conducted by juxtaposing the analytical categories, highlighting aspects considered similar and those deemed different, based on the theoretical framework of the study, involving inferences and interpretations.

Christmas gift-giving rules system

The environment

Subjects do not participate in gift exchanges during Christmas celebration gatherings, practicing this act more privately and with less exposure

to public observation. The individuals involved in these gatherings mainly fall into three core groups: the primary (parents, children, siblings, spouses); the secondary (grandparents, uncles, cousins, godparents, and godchildren); and the non-family (friends and colleagues). The non-family group is rarely present at the ceremony, as celebrating Christmas is predominantly a family ritual.

The premise that “Christmas presents are primarily distributed at gatherings where each person gives and receives gifts” is not practiced, as such gatherings are usually centered around meal consumption and socialization. This is justified by the financial resource limitations for purchasing gifts (FALDETTA, 2018; CORDEIRO; WONG; PONCHIO, 2019), which influence decisions about who should receive gifts or not, forcing individuals to make choices based on the closeness or distance of kinship in their relationships (WARD; CHAN, 2018).

Motives for exchanging gifts at different times during the Christmas celebration occur because people do not celebrate together in person, either because they do not live nearby or because they are not part of the subjects’ family (friends). The practice of exchanging gifts before or after the Christmas date is an emerging ritual that is becoming increasingly more casual, making the exchange more random than ritualistic. For these individuals, only those who are close are perceived as “worthy” of receiving gifts, while those who are not nearby must wait for other opportunities to be gifted. This premise is quite different from what Caplow (1984) identified, as many American gift-givers sent presents via mail to their relatives.

Women play a prominent role in the involvement with Christmas decorations (CAPLOW, 1982). Although there are various types of decorations appreciated by the participants, some are emphasized: Christmas tree; tableware (napkins, tablecloths, glasses, plates, candles, etc.); fruit displays; and additionally, lights and nativity scenes stand out.

According to the arrangement of the decorations throughout the rooms of the households, the Christmas tree and the decorated table

are the most dispersed. As such, they are moved to different locations, often placed very close to where the family members will gather. More specifically, the decorated table set with meals is the focal point of the family gathering.

The statement that “Any environment where gifts are distributed is generally decorated” is uncharacteristic, as there are frequent gift exchanges outside of this scenario. Similarly, “singles, without children, living alone, usually decorate their homes, even if they do not have Christmas trees”, indicates that this profile has not been behaving in this way — and the same applies to tree decoration. Thus, it was observed that the stimuli to decorate and set up Christmas trees are intrinsic to family units — spouses and children living together — confirming Caplow’s (1982; 1984) findings.

Couples with young children set up Christmas trees. For parents, transferring Christian values through involvement in decorating the Christmas trees with their young children is a way to formalize traditions and religious beliefs, thereby psychologically preparing people to enjoy the holiday season.

Single individuals without children, when living with their parents, showed a greater propensity to set up Christmas trees; however, single individuals without children living alone are less likely to do so. Thus, individuals living alone are less motivated to decorate trees because this activity has culturally been rooted as something performed within a family group, since putting up Christmas trees is part of the larger ritual that is the Christmas celebration — which, like any ritual, also has a script and defined roles (ROOK, 2007).

Christmas presents are not distributed under or around Christmas trees and have been absent in the researched context. Displaying presents on the trees is a way to attract attention and generate curiosity among those who might receive one, which can create issues in relationships, since many recipients may not receive them due to factors such as insufficient money, lack of attention to certain relationships, or embarrassment (RUTH; BRUNEL; OTNES, 2004).

Thus, Christmas presents are stored in cabinets, wardrobes, bedrooms, cars, etc. — to prevent individuals from developing expectations of receiving gifts — and are offered only at appropriate moments and when the dyad is isolated (MORTELMANS; SINARDET, 2004). In the case of displaying fake presents with empty shoe boxes wrapped solely as a form of room decoration, this is well represented in homes, re-signifying that presents can also serve as Christmas decorations.

Social relationships

The relationships involved in gift exchanges are characterized by three aspects: the price of the gift, the type of gift, and the degree of kinship. There is a rule that nuclear kinship relations tend to involve larger monetary amounts in gifts, while secondary or extrafamilial relationships are exchanged with lower prices; therefore, financial efforts are greater among close family members. This fact aligns with the contributions of Mortelmans and Sinardet (2004) and Pillai and Krishnakumar (2019), since close kinship relations form the fundamental basis of the scale rule, as the core is in the importance and intensity of the relationship (KOMTER; VOLLEBERGH, 1997).

Gifts with relatively high prices were given to spouses, boyfriends/girlfriends, and siblings. These valued gifts may indicate that the relationship holds importance and appreciation; however, there are also more moralistic relationship priorities (such as parents and young children) associated with higher gift prices. Spouses tend to reduce the price levels of their own gifts to allocate greater values to their children and, when applicable, to their godchildren, given limited financial resources. Another observed point is that individuals without children are more likely to give more expensive gifts to their parents than to their partners (LOURENÇO; REZENDE, 2012).

Cheap gifts are mostly items given to relationships outside of immediate family, such as friends and colleagues. It is very common to offer “generic” gifts to this group, such as cosmetics, chocolates, and beverages, which require minimal information about the recipients.

The scale rule influences the studied context; however, the hierarchy regarding the monetary valuation of relationships through gifts has undergone modifications, such as the inversion of the relationship between spouses and parents-children, with the latter being identified as more valued. Thus, the premise that “a conjugal relationship is more valuable than a parent-child relationship for gift-giving” proved to be contradictory.

Even though young children are still more valued than children who are already financially independent, parents’ attitudes remain similar. This logic is based on the affective and emotional responsibility to provide more valued artifacts to their heirs (FLYNN; ADAMS, 2009). Thus, the act of procreation takes the place that would originally belong to the couple, which tends to pay more attention to these relationships when giving gifts.

Descendant relationships (parents-children) are more highly valued monetarily than symmetrical kinship relationships (spouses) or ascending relationships. Another factor that may have influenced this shift is the number of children in households, since, according to the Brazilian Institute of Geography and Statistics (IBGE, 1980), the average number of children per household was 4.12, whereas today it is 1.86 children per household (IBGE, 2010).

In terms of gifts offered, kinship relations such as young children and nieces/nephews did not give presents in return to their parents or uncles, which was expected, based on Caplow’s (1982) findings, since financial dependence, along with age, can impact reciprocity (BELK, 1976; 1979; BREDEWOLD; TONKENS; TRAPPENBURG, 2016; PILLAI; KRISHNAKUMAR, 2019).

The kinship relationships that showed the greatest reciprocity were: parent-child (adults), followed by relationships between siblings, spouses, and in-laws (parents-in-law and children-in-law). On the other hand, less reciprocal gift exchanges were observed in relationships such as grandparents-grandchildren (with grandchildren not reciprocating), uncles-nephews (with nephews not reciprocating), and among friends. In this sense, Caplow (1984) noted that there is little to no reciprocity

among non-relatives, as confirmed in this study, such as between employers and employees, and teachers and students.

Again, women are the most involved in giving gifts, receiving more presents compared to men — confirming the studies by Caplow (1982), Mortelmans and Sinardet (2004), and Sinardet and Mortelmans (2009). According to Yan (2005), this occurs due to the effect of the ideology of love, as women are much more responsible for the preparations of Christmas tasks and have greater involvement in symbolic networks of relationships (SINARDET; MORTELMANS, 2009). Among the men who gave presents at Christmas, those who were married did so jointly with their wives. Single men primarily gave presents to women, especially mothers, sisters, aunts, and grandmothers.

Participants felt more compelled to reciprocate with their closer kinship ties in exchange for the greater symbolism in these relationships (LOURENÇO; REZENDE, 2012). Supporting these findings, Komter and Vollebergh (1997) suggest that giving gifts within family bonds involves a certain moral obligation, whereas friends are chosen not out of obligation or tradition but based on mutual affection, with the prices of these gifts being more “free” to be practiced.

Nuclear relationships are common for reciprocity with unequal gift prices. Early stages of romantic relationships consider that gifts represent artifacts that materialize social bonds, and balanced reciprocity in gift exchanges indicates that, possibly, these relationships are not viewed as very close, as the individuals are still getting to know each other.

The premise that “there is usually no equivalence in the value of exchanged gifts between spouses, parents, and adult children, except among siblings” may be more accepted in nuclear relationships; however, the imbalance found in gift reciprocity among siblings contradicts Caplow’s (1984) premise.

The artifacts

Participants do not give presents without wrapping, unlike what Mortelmans and Sinardet (2004) identified in European culture. They see

wrapping as a means of bringing appreciation, which may reflect the value Brazilians place on aesthetic considerations — that is, it being one of their core values (TAMAYO, 2007). Everything that Brazilians can “beautify”, they will do so.

Packaging adds an element of surprise and curiosity, extending until the recipient views and assesses the content of the packages (HENDRY, 2008). Even though the packaging is evaluated as part of the satisfaction with a gift, Caddah (2008) reveals that it is not an isolated factor, as people also tend to assess a set of attributes such as price and quality, which makes the packaging diminish the idea of a commodity (CARRIER, 2005). Therefore, this rule is faithfully followed by subjects; when violated, they do not associate it with being a gift, nor do they generate expectations or emotions.

The aesthetic judgment of packaging is made before opening, as predicted by Raghurir and Greenleaf (2006) and Deng and Kahn (2009). Participants pay attention to the packages in an attempt to understand their content, even inciting whether they are “good” or “bad” gifts, through colors, size, type of paper, and shapes of the presents. Wrappings with visible commercial brands already anticipate what will be found inside. This finding suggests that commercial brands can be either loved or repudiated within the realm of gifts.

The premise that “Christmas presents are usually wrapped with emblematic and iconographic elements of Christmas” has been disrupted by marketing and branding actions of companies, as retailers act as orchestrators of the gift-giving act. Wrappings have shown considerable dispersion of these Christmas symbols, as many packages featured brands of products and companies. The most prominent brands were from the hygiene and cosmetics categories, followed by brands from clothing and footwear categories.

As a result, the packaging dynamics began to communicate their brands within a nostalgic and emotional context, penetrating the rituals and homes of families during the holiday season.

Thus, the wrapping did not ensure themes that illustrate the colors of Christmas (red and green) or that recall Santa Claus, Christmas trees, bells,

etc., since participants showed little concern for maintaining these practices. Instead, colors such as gold, silver, and shades that emphasize gender differences (blue and pink) were present, and the wrappings had fewer details. This practice was abandoned, and participants began to use and appreciate the wraps provided by stores themselves, reducing time spent searching for ideal packaging, contrary to what Hendry (2008) pointed out.

Final considerations

The objective of this study was to revisit the rules of the act of gift-giving during Christmas, proposed by Caplow (1984), and to redirect them to a new context by identifying such scenarios. The effort of this study was not to bring aspects of Brazilian culture for comparative analysis, but rather to identify and empirically describe behaviors. It can be understood that the systems of rules governing gift-giving are not static; they are socially and culturally shaped, molded within specific periods and spaces, and continuously constructed and reconstructed over time.

While the least perceived similarity in the study is in the rules of distribution and decoration, the rules of the tree, scale, reciprocity, and packaging showed a certain re-signification of behaviors based on the premises established by Caplow (1984). Meanwhile, the rules of dinner, selection, and appropriateness appeared to be “intact” in this study.

Despite the well-known importance of gift-giving in society as an essential function of sociability, and the creation and maintenance of individual or collective relationships (SHERRY, 1983), the rules that govern it change depending on how these processes are culturally constructed, creating symbols of social “etiquette” in the act of giving.

Theoretically, the study advanced by understanding how the rules identified within one culture can behave in another context, providing a systemic view of how the functioning of these rules influences the Christmas gift-giving ritual. Thus, it was possible to highlight the cultural importance that gift exchanges play in family sociability, particularly regarding the maintenance of relationships.

The study also progressed by providing practical insights into the consumption of Christmas items, aiming to relate gifts to various types of relationships during Christmas, as well as aspects that are appreciated or avoided in the celebration. Furthermore, the study offers valuable insights into elements of Brazilian culture within a widely celebrated ritual.

As limitations of the study, the variation in the profiles of the interviewees could have been more diverse. Brazil is a continental and multicultural country; therefore, the research was limited to consumers from the South, which could also have presented an opportunity to compare other Brazilian regions. The gift-giving rules studied were guided by Caplow's (1984) premises, which may have "concealed" the emergence of new rules.

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About the authors

Olga Maria Coutinho Pépece: associate professor at the State University of Maringá and the Graduate Program in Administration at the same university. Member of the Interdisciplinary Research and Marketing Studies Group and the Fashion Consumption Studies Group. Holds a Ph.D. and a Master's degree in Administration from the Federal University of Paraná. Graduated in Administration from the State University of Londrina. Coordinator of the Fashion Consumption Working Group at the Fashion Colloquium and leader of the Consumer Behavior theme at the Administration Seminars of the School of Economics, Business, Accounting, and Actuarial Science at the University of São

Paulo, as well as the Marketing and Society theme at the National Association of Graduate Studies and Research in Administration. E-mail: olga.mcp@uem.br.

Huallady Amantino Bitencourt de Proença: Ph.D. candidate and Master in Administration from the State University of Maringá. Specialist in Organizational Psychology, in People Management from UniCesumar, and in Quality and Productivity. Graduated in Administration from UniCesumar. He is an ISO 9001 lead auditor and ISO 45001 lead auditor. Works as an expert in personnel administration and as a higher education lecturer. Currently, he is the human resources coordinator at Grupo DRM. E-mail: huallady.bitencourt@hotmail.com.

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