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The Role of Brands on Consumers' Purchase Decisions: The Milk Industry

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ABSTRACT: The Role of Brands on Consumers' Purchase Decisions: The Milk Industry

This study attempts to understand how consumers consider, evaluate and behave when making purchase decisions in the milk category as well as how it is influenced by branding. Thus, results have shown that brand awareness is a commonly used heuristic on consumers' choices, although other product-related attributes such as price, flavour and quality are also considered. Milk brands present different associations on consumers' minds but, in some cases, they are not distinctive enough among each other. In terms of the decision-making process, consumers have several brands on their consideration set but they do not actively evaluate them, buying mainly for habit or driven by promotional campaigns as well as family or specialists' recommendations.

Key Words: Brand Awareness, Brand Associations, Consumer Decision Journey

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1. INTRODUCTION

The main purpose of the present study is to understand the impact of Brand Knowledge (Brand Awareness and Brand Image) on consumers' behaviours and their purchase intentions, applied to the Portuguese packaged milk market as well as comprehend to what extent brand associations influence purchasing attitudes. Additionally, the study evaluates the factors influencing consumers' choices and their decision-making process within this category.

The present thesis starts by overviewing the milk industry landscape in Portugal, followed by a literature review, in order to understand the current background regarding this theme and its theoretical foundations. After that, the focus is on the exploratory research conducted (through both qualitative and quantitative methods), not only describing the main research objectives and methodology used but also analysing the results and conclusions that arise from the research. Lastly, final remarks, managerial implications, limitations and possible extensions are also presented.

2. MILK MARKET CONTEXT AND OVERVIEW

Milk products' sales in Portugal have declined by 2% in 2016. (Euromonitor International, 2016) On the one hand, the decrease is explained by a **reduction in value *[Appendix 1]***, due to the decline of the category's average unit price, the excess of supply and the strong promotional campaigns. On the other hand, **in terms of volume**, this decay is justified by a strong decrease in milk consumption ***[Appendix 2]*** due to its negative health effects claims, with milk alternatives from vegetal origins (such as soy, almond, rice and cocoa) gaining market penetration and increasing sales. In fact, the increase of cardiovascular diseases and cholesterol as well as lactose intolerance cases have negatively affected the category's sales, representing a threat for the milk brands. Nowadays, the Portuguese population is becoming more concerned about wellness and healthy eating habits, preferring the alternative vegan products or the substitute offers (such as lactose free and added fibre, calcium and omega 3 products). In terms of the competitive landscape, Lactogal leads the category with 51.3% of value share in 2016, with the main retailers, namely Modelo Continente (8.8%), Jerónimo Martins (8.5%), Lidl (4.4%) and Auchan Hipermercados (4.3%) composing the top 5 company shares. Considering brand shares, Mimosa is the most purchased brand within the category with a 18.6% market share, followed by Agros and Gresso with 13.9% and 10.7%, respectively. Private labels from Pingo Doce and Continente have each, approximately, 9% of the market revenues while the remaining brands hold a market share of 5% or less, being ranked in the following order: Vigor, Auchan, Milbona, Alpro, Nova Açores, Matinal, Terra Nostra, Vive Soy, Ucal, Parmalat and others (Euromonitor International, 2016). ***[Appendix 3]*** The strong presence of private labels in the brand shares ranking reflects their importance in the category. In fact, as per Grupo Marktest (2013), retailers have a higher share of shelf of their own brands (31.9%), followed by Mimosa (21%), with all other brands having less than 10%. Still, it is expected that regular promotional campaigns of manufacturers' brands negatively impact private labels' revenues as consumers still seem to prefer branded products. Also, the shift from elementary products to alternative and more added-value offers may represent an opportunity for milk brands to reach new consumer segments and recover volume, contradicting negative prospects.

3. LITERATURE REVIEW

The present section focuses on theoretical concepts and previous studies related with the impact of Brand Equity and Brand Knowledge on consumers' choices as well as consumers' decision-making process, by analysing their Consumer Decision Journey (CDJ).

3.1. Brand Equity and Brand Knowledge

Brand Management and strategic branding have become emerging research topics with increased importance being given on understanding how to create, measure and sustain Brand Equity (Zimmer and Kapferer, 1994). Several distinct models based on consumer, company and/or financial levels have been developed to capture the multiple perspectives of Brand

Equity. However, despite alternative approaches, the majority of researchers consider consumers' Brand Knowledge as the basis of Brand Equity (Keller and Lehman, 2006).

Aaker (1996) suggests 4 key drivers (seen as "brand assets") of consumers' brand perceptions: Perceived Quality, Brand Name Awareness, Brand Associations and Brand Loyalty. Similarly, Duane E. Knapp (*apud* Kotler and Pfőertsch, 2006) proposes 5 main brand dimensions to create added value to a product/service, including Relative Quality, Financial Performance, Customer Loyalty, Satisfaction, and Overall Esteem towards the brand. Finally, from Keller's perspective, Brand Equity is based on the consumers' point of view, depending on their thoughts, feelings, images and perceptions about the brand. The author created the **Customer-Based Brand Equity (CBBE) Model** which represents "*the differential effect brand knowledge has on consumer response to the marketing of that brand"*. The present work will further consider this model as the basis of the analysis. Thus, based on the CBBE concept, Brand Knowledge is the source of Brand Equity and it has 2 dimensions: (1) **Brand Awareness and** (2) **Brand Image**. Accordingly, a strong and positive Brand Equity implies high level of awareness but also strong, favourable and unique brand associations and perceptions (Zimmer and Kapferer, 1994).

3.1.1. Brand Awareness

Brand Awareness represents the "*strength of a brand's presence in the consumer's mind"* (Aaker, 1996). In other words, it can be described as the extent to which a potential buyer is familiar with a certain brand and/or capable of remember it under different circumstances.

The scope of Brand Awareness is wide, depending on its level of salience in consumers' memories, and it can be categorized into different levels. Keller (2013) considers two main sources of Brand Awareness: **Brand Recognition and Brand Recall**. While the first level of awareness represents consumers' ability to remember a brand based on past or prior experience when stimulated by the brand image, value or products; Brand Recall presupposes "*retrieving the brand from memory when given the product category, the needs fulfilled by the category,* *or a purchase or usage situation as a cue"* (Keller, 2013). So, while Brand Recognition implies a stimulus, Brand Recall requires that consumers associate the brand to a product category or consumption/purchase circumstance and remember it spontaneously. Laurent, Kapferer, and Roussel (1995) also distinguish the sources of Brand Equity in 3 levels: Aided Brand Awareness (consumers recognize a brand when prompted), Spontaneous Brand Awareness (consumers are familiar with a brand when given a product as cue) and "Top-of-Mind" Awareness (consumers first recall a certain brand from specific product category, being preferred in their minds). Finally, Aaker (1996) defends 4 levels of Brand Awareness, ranging from Recognition, Recall, Top-of-Mind to Dominant. The first definitions are aligned with other authors' concepts, while "Brand Name Dominance" refers to when a brand name is the only associated to its category, so consumers are solely able to recall a single brand for that product.

The power of Brand Awareness is also mentioned on a survey carried out by the marketing agency Doyle Dane Bernbach (*apud* Kapferer, 2008) about the most important brand assets, with 65% of the subjects considering Brand Awareness as the key factor of a strong brand. Similarly, McKinsey & Company concluded that brands that are in consumers' initial consideration set for purchase are up to 3 times more likely to be bought. (Court et al., 2009)

The impact of Brand Awareness on consumers' purchase behaviour might also be influenced by their **level of involvement** towards a product category. In fact, according to McMahon (1980) (*apud* Hoyer and Brown, 1990), when advertising low-interest product classes, emphasis must be given on creating and preserving Brand Awareness. This because since consumers tend to consider only a few items of information before deciding on a purchase, Brand Name Recognition may be reason enough to choose a particular and familiar brand instead of other unrecognizable brands (Jacoby, Szybillo, and Busato-Schach, 1977). Along the same line of thought, Keller (1993) suggests that low involvement decisions occur when consumers do not have either purchase motivation (lack of interest in the product/service) or purchase ability (lack of information/knowledge about the product/service category). In these situations, positive brand associations based on simple cues stored in memory may shape consumers' behaviour, giving preference to a brand they recognize or recall and increasing the probability of purchasing it. (Zimmer and Kapferer, 1994; Petty, Cacioppo, and Schumann, 1983). Additionally, Hoyer (1984) suggests that consumers tend to react as passive buyers in situations of low involvement and low importance decisions, following simplified heuristics (such as awareness, packaging or price) instead of spending time and putting cognitive effort into choosing a product/service. Hoyer and Brown (1990) have also studied the role of Brand Awareness in consumer decision process of "*common, repeat purchase-products*". Results have shown that, when consumers are familiar with a certain brand, they are more likely to purchase it, especially if they are first-time buyers; being Brand Awareness the most usually chosen heuristics on first trial. In contrast, when consumers are not aware of the brand, they tend to rely on other product characteristics such as packaging, price and ingredients' composition (when they are buying the product for the first time) or they trust on taste (when they have already gained experience about the category purchase options). Also, while the importance of Brand Awareness declines as consumers have the chance to try several brands, the quality perceived gains relevance as they get used to the category purchasing task. Moreover, it was concluded that consumers usually prefer well-known brands over high-quality brands, particularly when the higher quality products are from unknown brands. In fact, under the same taste test, over 70% of the participants chose the known brand, even if not considering it the brand with the higher quality product. More recently, Macdonald and Sharp (2000) have replicated the same study to another product category and the conclusions taken have supported the original results, considering Brand Awareness as an essential driver on consumers' purchase behaviour. Overall, the outcomes of these experiments are hypothesized to hold true also when applied for the packaged milk industry in study.

Finally, the relationship between both Brand Awareness dimensions and the relative power of Brand Recall have been studied by Young and Rubicam Europe, under the guidance of Jim Williams, originating the **"Graveyard Model"** (Aaker, 1996). ***[Appendix 4]*** According to it, when plotting on a graph Brand Recall versus Brand Recognition, brands tend to follow a theoretical curve, being the healthier brands the ones with high levels of Brand Recall and Brand Recognition at the same time. However, there are 2 exceptions: niche brands and "graveyard brands". The first situation is represented by brands that have a small but loyal consumers' basis, meaning that, despite the low Brand Recognition, Brand Recall of their consumers is high enough to compensate it and enlarge their position. In opposition, "graveyard brands" are known by their high recognition but low recall. In other words, even though consumers are familiar with those brands, they do not remember or consider them on purchasing decisions which might influence negatively their sales and their market shares (Aaker, 1996). Moreover, the importance of Brand Recognition versus Brand Recall also depends on **consumers' purchase behaviour and decision-making process** (whether it is in-store or outside the store) (Keller, 1993; Perera and Dissanayake, 2013). Brand Recognition is considered more relevant when purchase decisions are made in Points-Of-Sale (POS) as consumers are directly exposed to the brand as a reminder, while when they plan their purchases before arriving to stores, Brand Recall may be required and preferred (Bettman, 1979).

3.1.2. Brand Image

The concept of Brand Image has become a vital and common topic of analysis in consumer behaviour research. While some authors suggest broader notions such as Kapferer (2008), who considers Brand Image stands on the receiver's side, representing the way products/services covered by a certain brand are perceived by consumers; others tend to emphasize and analyse specific variants of Brand Image, such as symbolism, underlying messages, human characteristics (personification) and cognitive elements that are inherent to the consumers' brand perceptions (Dobni and Zinkhan, 1990). In the meantime, Keller (2013) suggests that creating a positive Brand Image requires linking "*strong, favourable, and unique associations to the brand in memory*". Those **Brand Associations** have different dimensions: (1) Brand Attributes, which are descriptive characteristics of the product/service (either product-related such as ingredients and composition or non-product-related like price, packaging, user imagery and usage imagery – according to Keller (1993)); (2) Brand Benefits, which are related to the personal meaning of the attributes of the product/service to consumers (either functional such as basic and safety needs, experiential such as pleasure and cognitive stimuli or symbolic such as social status and self-esteem) or (3) Brand Attitudes, which are consumers' beliefs and opinions regarding the brand (Keller, 1993; Park, Jaworski, and Maclnnis, 1986).

In order to analyse the impact of Brand Associations on consumers' purchase behaviour, Cass and Lim (2001) have focused on non-product-related brand associations (price, user & usage imagery, brand personality, feelings & experiences – as proposed later by Keller in 1998), studying Asian consumers' behaviour towards brands of fashion apparel. The results indicated that all components have an impact on individuals' purchase decisions, meaning that consumers are more likely to create favourable, stronger and unique brand associations when prices are perceived as affordable; their self-image is compatible with their brand-user perceptions; they have positive feelings attached to brands; and they value the brand's personality features. These results are expected to remain valid for the milk industry as brand image is hypothesized to be an important driver of consumers' purchase intentions also for fast-moving consumer goods (FMCG). Further on, Cass and Grace (2003) studied the main dimensions considered in service brands and how those influence consumers' Brand Associations and intentions to use. Price, core service and feelings towards the brand were the most prominent on consumers' minds, influencing Brand Associations and positively impacting their attitudes towards some service brands as well as their intentions to use them. Similarly, Perera and Dissanayake (2013) have later tested the impact of Brand Image on consumers' buying decisions in the make-up industry and they have claimed that brand associations are impactful on female purchasing behaviour.

3.2. The Consumer Decision Journey (CDJ)

In the past, the traditional **"*funnel metaphor*"** was used to understand consumers' touch points and track their journey towards a brand. ***[Appendix 5]*** According to it, consumers would start by considering a wide range of brands in their minds, narrowing them down until selecting the one to buy and increasing their loyalty (Court et al., 2009). However, nowadays, the model is considered outdated, as consumers are more connected and can easily access information through social media and digital platforms. As per Bonchek and France (2013), consumers' purchase process is no longer linear since they have new perspectives and opinions at any stage of the decisions, broadening and narrowing their consideration set of brands accordingly.

As an updated alternative, McKinsey & Company proposed, in 2009, the so-called **Consumer Decision Journey (CDJ) Model**. ***[Appendix 6]*** Contrarily to the *funnel*, it considers consumers' relationships with the brands as an on-going process which occurs not only during the purchase itself but also before and after it. The model defends that brand decision-making process is circular with four stages: Initial Consideration, Evaluation, Purchase and Post-Purchase. Also, communication between consumers and companies is not strictly in a one-way direction neither based on "push" marketing strategies. Contrarily, two-way communications are more usual since consumers actively "pull" and search for further information and opinions, driving additional marketing campaigns such as peers' reviews, Word-of-Mouth (WOM) and in-store activities (Court et al., 2009). The Post-Purchase moment also play an important role on consumers' Brand Loyalty, influencing their opinions as well as increasing their likelihood of further purchases. In fact, consumers that enjoy the brand may be locked in the Loyalty Loop (where they (1) Enjoy the brand, (2) Advocate it and (3) Bond with the brand). In these circumstances, consumers Advocate by Word-of-Mouth (influencing other possible buyers) and create a strong Bond with the brand, driving them again directly to the purchasing moment, instead of evaluating more brands every time they want to buy in the category (City, 2010). Recently, Edelman and Singer (2015) suggested that companies should connect to consumers in different and valuable touching points, creating interactive and innovative consumer-driven marketing activities, in order to catapult them directly into the Loyalty Loop and lock them in it, without the Consideration and Evaluation phases of the classic journey. That is: consumers start by Considering and Evaluating the brands of a category when they are purchasing it for the first time, but then they only Buy, Experience/Enjoy, Advocate and Bond.

Finally, **category involvement** may also influence consumers' Brand Loyalty as well as their behaviours along the consumer journey and their likelihood to enter and remain in the Loyalty Loop. According to Traylor (1981), when consumers are highly involved with a certain product, they tend to have only a few brands in their consideration set and be more loyal to them. On the other side, when the level of involvement is lower, they usually have a larger number of brands initially considered, being less committed to the brand and more willing to switch between brands. Nonetheless, since high-involvement products are more complex, consumers consider more factors on their purchase decision besides only the brand connection and associations. Because of that, Warrington and Shim (2000) suggest that highly involved consumers are constantly more predisposed to seek information, and process store and company's campaigns; while Zaichkowsky (*apud* Baumann, Hamin, and Chong, 2015) defends that, in high-involvement categories, consumers tend to create stronger affection to brands, recalling them easily and research more for information during the process. This means that those consumers may bond to the brand due to their commitment to it, however, they are less likely to enter in the Loyalty Loop due to the complexity of the buying decision.

In a parallel analysis, Lastovicka (1979) defends that, in low involvement product classes, consumers are more passive and re-active, not examining deeply the brands available in the category neither searching actively for information and problem solving. Rather, consumers rely on company-driven marketing campaigns, picking information "accidentally" but not seeking for it. In fact, the "*consumer not only thinks of the product class as trivial, but further has little bond to his brand choice*" (Lastovicka and Gardner, 1997 *apud* Traylor, 1981). From that analysis, it can be inferred that consumers of low-involvement categories might remain in the Loyalty Loop not because of high commitment and Bond with the brand but because of laziness or inertia, avoiding Consideration and Evaluation phases after the first trial because of the low risk perceived and the importance associated to the category/purchase. Thus, since the milk category matches the notion of "frequently purchased, commodity-like good" mentioned by Lastovicka, it is hypothesized that these findings hold true for the referred product category. In conclusion, the present literature review reflects the extensive understanding developed on branding, considering different researches about the role of brand on consumers' purchase behaviour. The subject is not only important to marketing professionals as it influences and conditions the way companies advertise and communicate but also, and more specifically, to brand managers as it allows them to identify the extent to which the brand lies in consumers' minds. So, despite previous studies in branding with FMCG, the conclusions and implications may vary depending on the product category. In this sense, once no research was done specifically for the milk category and due to its importance in Portuguese eating habits, the conclusions of the current project may provide constructive and useful managerial implications. Thus, several **research objectives** were considered: (a) assess consumers' levels of Brand Awareness and Brand Knowledge towards the category and their relationship with brands, (b) understand consumers' category perceptions and attributes sought; (c) evaluate consumers' Brand Associations and Brand Images (d) discover consumers' preferences, influences and information channels, (e) comprehend Consumers' Decision Journey and purchase behaviours.

4. RESEARCH DESIGN AND METHODOLOGY

According to Malhotra (2004), research design is the cornerstone of marketing research projects, being either exploratory (to get insights and understanding about a problem) or conclusive (to test hypothesis and possible relationships). To address the present problem, an **exploratory research design** was conducted, collecting both secondary and primary data, with the latter including a qualitative research, followed by conclusive (descriptive) research using quantitative data and cross-sectional design to verify and quantify the insights. ***[Appendix 7]***

Secondary data comprises sources of data that were consulted for better understanding and solving the problem at hand but that were not created for the specific purpose of the project (Malhotra 2004). This information was collected from external sources, using Euromonitor, Marktest and other public sources to understand the milk market in Portugal. Additionally, several marketing textbooks and articles from credible journals were analysed in order to obtain a deepened knowledge of the role of brands in consumers' purchase intentions.

Primary data consists in information that was generated specifically to address the research problem of the current project (Malhotra, 2004). In this case, the primary data was obtained through a mixed methodology using qualitative and quantitative research.

The qualitative data gathering consisted in direct research techniques using semi-structured interviews, followed by an indirect (disguised) procedure (projective technique) using expressive methods, encouraging consumers to interpret and evaluate others' behaviours and feelings. For both methods, interviewees had to fulfil the following pre-requirements: (a) living in Portugal in the last 5 years; (b) being aged over 18 years old; (c) purchasing or drinking milk at least once a month; and (d) knowing at least 3 brands of milk.

Firstly, with the purpose of gaining initial and deeper insights regarding consumers' purchasing and consumption habits, there were conducted 12 semi-structured interviews with some pre-determined topics to be covered (such as decision and purchasing process, information and media channels, context of usage, brand and category perceptions and brand associations), using a semi-structured interview guide. ***[Appendix 8]*** These interviews are considered non-standardized since interviewees had the chance to freely present their experiences and opinions without following a rigid protocol of questions but the interviewer also had the opportunity to explore particular themes or responses further. (Saunders, Lewis, and Thornhill, 2009). All interviews were audio-recorded and conducted in Portuguese, face-to-face, in a one-to-one basis, having started from general topics about respondents' behaviours and preferences to more focused topics about category and Brands Associations. Individual interviews were preferred over focus groups or group interviews since these allow to gain detailed individual insights and comprehend differences among target segments while avoiding interpersonal bias or group-thinking. In the end of the interviews, a Projective Technique, using a third-person technique, was conducted to disclose indirectly consumers' associations towards the milk brands that they mentioned. Respondents were asked to describe the "typical" consumer of each brand recalled previously (Brand Personification) in terms of gender, age and income. Finally, demographic and psychographic data were collected for a better understanding of respondents' profiles.

After the qualitative data collection, the information was analysed through an interview grid ***[Appendix 9]*** considering the frequency and sequence of topics and the similarities/differences among interviewees' answers in terms of behaviours, characteristics and associations. Based on the qualitative insights, the quantitative research consisted on a descriptive data analysis through an Internet-based questionnaire to generalize the results and confirm whether the results hold true when considering a wider audience. This type of survey technique was considered the most advantageous since it presents faster distribution with lower costs while allowing a broader sample of respondents to be reached, even for distant access.

The survey was created using the Qualtrics software, being held in Portuguese and including 22 forced-response questions, divided in 6 sections: (1) Pre-recruiting filters; (2) Brand

Awareness; (3) Brand Choices and habits; (4) Influences and Information Channels; (5) Category Perceptions and Brand Associations and (6) respondents' profile. ***[Appendix 10]***

Initially, respondents were faced with the 3 pre-screening questions, ensuring a convenient sampling design process and avoiding sampling frame errors. In terms of questionnaire design process, consumers' Brand Awareness was tested (either Brand Recall and Brand Recognition) while consumers' brand choices and consumption habits were also enquired. Besides that, respondents were not only asked to evaluate their influences on purchasing choices (using a 7-point importance Likert scale) but also to rank several information and media channels by level of relevance on their decision process. The most sought after brand and product attributes within the category were questioned as well. Then, based on the qualitative research insights, participants were confronted with 18 sentences that they had to classify from "strongly disagree" to "strongly agree" (using a 5-point agreement Likert scale). Respondents also had to evaluate their milk category involvement and their Brand Commitment using a scale from 0 to 100. Afterwards, in order to explore consumers' Brand Associations to each of the main milk brands, respondents were asked to select the brand that stands out for a set of specific characteristics. Similarly, they described each of the 7 most consumed milk brands using only one word (either colours, sensations, images, etc). In the end, several demographic characterization questions were asked (including age range, gender, education and occupation).

5. RESULTS AND DISCUSSION

5.1. Sample Characterization

Firstly, from the 12 interviews conducted, 8 of the interviewees were female, and 4 were male, with ages ranging between 22 and 79 y/o. The diverse sample profiles (in terms of gender, age, education and occupation) deeply enriched the insights. ***[Appendix 11]***

Regarding the quantitative research, from 189 respondents who initiated the survey, only 170 were considered "eligible" after the pre-screening questions and, therefore, invited to continue the questionnaire. From those, only 148 surveys were successfully completed, resulting in a response rate of 78.3%. In terms of sample profile, 99 were female (66.9%) and 49 were male (33.1%). In terms of age, the younger range is the most dominant, with 27.7% of the sample between 18 and 24 y/o while respondents over 65 y/o are the less represented in the sampling frame (4.7%). All the other age ranges were well-represented in the survey responses, with more than 10% weight each. The balanced dispersion of ages assures population representativeness, allowing an overall perspective of consumers' perceptions and decisions, disregarding their age. Considering respondents' education, 36.5% have bachelor degrees while 28.4% have master degrees or post-graduations. Only 11.5% of the participants have studied until $11^{th}/12^{th}$ grades, while other education categories represent less than 10% of the sample. In terms of occupation, students represent ¼ of the respondents, while middle and top managers are the most dominant in survey responses (30.4%). Despite less frequent, respondents from all other professional occupations also participated. Finally, the education and occupation levels of the majority of participants can be explained by the survey technique chosen, which is more accessible and easily used by respondents from those classes. ***[Appendix 12]***

5.2. General Results

Research results are presented following the 5 main research topics defined at the beginning:

a) Brand Awareness and Brand Choice

Based on the research conducted, Brand Awareness was considered a primordial pillar on consumers' purchase decisions with 81% of the questionnaire's respondents claiming that they "*only purchase milk from brands that they know*". When assessing Brand Recall, it can be concluded that Mimosa stands out as the most well-known brand in the milk industry, being the first brand remembered (Top-Of-Mind Brand) by 43% of the respondents and being recalled in 75% of the responses when given the product class as cue. Likewise, Agros appears in a similar position on consumers' minds, being distinguished as Top-Of-Mind by 32% of the participants and being recalled by 77% of them. Far from this position but still relevant are Gresso and Matinal brands, being the top-of-mind brand for 8% and 4% of the consumers and being recalled, respectively, by 28% and 16% of the respondents. Private labels such as Milbona and Auchan as well as brands of vegetable milk (like Alpro and Vive Soy) are clearly less salient on consumers' memory, with levels of Brand Recall close to zero.

When given a list of the brand names, respondents' levels of awareness (recognition) increase considerably. Indeed, Mimosa and Agros were recognised by almost all the respondents (98% and 99%, respectively). Opposingly, Milbona, Auchan, Alpro and Vive Soy, which had already presented low levels of recall, are also the less recognized by consumers, with values of 40%, 22%, 54% and 28%, respectively. However, surprisingly, brands as Gresso, Continente, Pingo Doce, Vigor, Matinal, Ucal and Parmalat evidence a clear strengthening of familiarity in respondents' minds, soaring from relatively low levels of Brand Recall (for the majority, less than 20%) to being recognised by 70%-80% of the participants. ***[Appendix 13]***

Thus, when applying the Graveyard Model in the Portuguese milk market ***[Appendix 14],*** although there are no niche brands represented, the graph confirms the strength of Mimosa and Agros on consumers' memory, being positioned in the upper-left-hand corner and classified as the healthiest brands due to their high awareness. However, as it was diagnosed previously, almost all other players in the market, namely Gresso, Continente, Pingo Doce, Vigor, Matinal, Ucal, Terra Nostra, Nova Açores and Parmalat are in the graveyard area, as they are recognised by participants but they are only recalled by a few respondents. This positioning might represent a threat for some brands' performances due to their lack of Brand Recall, whose importance is even higher for consumers who plan in advance what they are going to buy. (Bettman, 1979)

However, considering Euromonitor International (2016) data from 2013 to 2016, milk graveyard brands do not seem to have suffered drastic decreases of sales and market share.

[Appendix 3] Nevertheless, competition is expected to increase while volume consumption might decrease, which pressures brands to differentiate themselves.

Also, when comparing the percentage of respondents that recognize those brands and the proportion that buy them (Brand Awareness versus Brand Choice), it is noticeable how, in some cases, the power of Brand Recognition is not reflected on Brand Purchases. ***[Appendix 15]*** For example, Parmalat and Vigor are well-known by consumers (75% and 68%, respectively) but their awareness is over-valued as it does not lead to higher sales (2% and 6%, respectively).

b) Category Perceptions and Attributes Sought

Qualitative research has shown that interviewees purchase milk weekly or, at least, monthly, with most them drinking it every day. Similarly, according to the survey, more than 53% of the respondents consume it every day while about 19% drink milk 1 to 3 times a week. Breakfast is considered the ideal meal to drink milk, being selected by 91% of the participants. These results reflect the importance of the product in Portuguese eating habits.

When asked about their perceptions about the milk category, interviewees mentioned associations such as "*cows", "healthy", "Azores", "family", "breakfast" and "calcium"*. However, on a larger scale, "*healthy", "calcium*" and "*breakfast*" were considered respondents' strongest associations. ***[Appendix 16]*** It seems to be no consensus on qualitative or quantitative research regarding consumers' most valued attributes on purchase decisions. While, as expected, brand reputation and brand nationality were mentioned as relevant by some interviewees *[e.g. "I am loyal to the brand, I always choose it, so I would say the brand itself is important" (Interviewee 5; Female; 22 y/o; GO7)* or *"I only consume national brands and I am satisfied with them" (Interviewee 10; Male, 39 y/o; GO3)],* product-attributes were considered more significant in the decision-making, with respondents considering flavour, quality and price as the most relevant criteria on the Consideration and Evaluation phases. ***[Appendix 17]*** Indeed, in the survey, about 70% of the respondents "agreed" or "strongly agreed" with the sentence "*As long as I like the flavour, the brand is irrelevant for me*" while only 41% of the participants were "*willing to pay more for the brand they are used to*". These conclusions seem consonant with Hoyer and Brown (1990) studies which indicate that consumers use simplified heuristics such as Brand Awareness, packaging or price on common, repeatedly purchased products, while, at the same time, flavour and quality gain importance in the decision process as consumers get familiar with the purchasing task and the category.

c) Brand Associations and Brand Images

Brand Associations were also an important topic of research. However, when asked about a brand characterization or personification, consumers tended to describe product attributes, mentioning its flavour and features, instead of focusing on specific brand associations. This means that consumers focus mainly on product related (such as ingredients and composition) or non-product-related (like price and packaging) brand attributes but they find difficult to mention brand benefits and attitudes. Also, most consumers perceive brands as very similar, not detecting many distinctive characteristics among them [*e.g. "For me, there are no points of difference between Gresso and Mimosa, they are pretty much the same*" *(Interviewee 1; Male; 42 yo; GO1)* or "*I think that the products offered are all similar*" *(Interviewee 2; Female; 79 yo; GO6)]*. This reveals milk brands' ineffectiveness in generating unique associations. In fact, according to Keller (2013), superior brands must have strong, favourable and unique associations, but, in this research, consumers' brand perceptions were particularly similar among each other, with Alpro being the most distinctive, due to its products' composition.

Based on the qualitative research, Mimosa and Agros were both considered "*consolidated brands in the market with tradition and reputation" (Interviewee 4; Male, 52 yo; GO1),* being the "typical" consumer defined as anyone, regardless of age, gender or income. Nevertheless, despite the lack of consensus, Mimosa was more frequently associated to middle-aged women who buy milk for their families and children, while Agros is perceived as targeted for an older public. Private labels from Pingo Doce and Continente, are generally perceived as being just as good as the branded products but the consumers would be "*people who are driven by price and have lower incomes" (Interviewee 8; Female; 52 yo; GO1).* Terra Nostra was associated with *"intense flavours*" and *"Azores"*, being perceived as bought mainly by people who care about the product's origins and ingredients. Vive Soy and Alpro, due to their non-dairy products, were perceived as more expensive and selective brands, targeting mainly vegetarians. In opposition, the watchword for Ucal was "*chocolate*", pointing to teenagers and children as the typical consumers. The other milk brands in study were not recalled by the majority of the interviewees, so it was not possible to establish common associations or consumers' perceived profiles. The results of the questionnaire helped complete the brands' image landscape, with Gresso being seen as a good but a cheap and ordinary brand; Nova Açores was related to "*Azores"*, *"nature"* and *"cows"* while Matinal associations were "*white"*, *"morning"* and *"healthy"*. Finally, several brands were evaluated in terms of market reputation, flavour, value for money, innovation, variety, packaging, nutritional composition and advertising; being, Mimosa, Agros, Matinal and Alpro the ones with better performances, in total. Unsurprisingly, Mimosa was the most frequently chosen by the respondents in every factor analysed. ***[Appendix 18]***

d) Consumers' Preferences, Influences and Information Channels

Firstly, semi-skimmed milk is the preferred type of milk, being chosen by 78% of the respondents. However, contrarily to Euromonitor International (2016) prospects, there is no high level of acceptance and knowledge about alternative types of milk, especially vegetable milks. While 23% of the respondents consume flavoured milk and 22% drink lactose-free milk, only 6% opt for vegetable alternatives and 2% choose extra-calcium, fibre and omega 3 milk. In the interviews, these added-value products were perceived as more expensive and healthier, which was confirmed by the quantitative research, since 45% "agreed" or "strongly agreed" with the characterization. However, while in the qualitative research vegetable milks were perceived as targeted only for vegetarian or lactose-intolerant consumers, in the survey, 61% of the respondents “disagreed” with that sentence, showing to be more informed and familiar with the products offered and the targeted consumers.

The weight of private labels within the category is not only visible by their market shares and awareness but also by how consumers are willing to trust and buy them. In the interviews, despite some wariness *[e.g. “I would buy other brands as long as they were not private labels because I am not sure about the origin of the milk*” *(Interviewee 1; Male; 42 yo; GO1)*], most of the interviewees do not think “*there are many differences between branded and unbranded milks" (Interviewee 6; Male; 67 yo; GO6).* Similarly, 71% of the survey’s respondents report purchasing unbranded milks and 86% disagree with the sentence “*I would never drink milk from private labels*”.

When asked about their influences and motivations, respondents considered specialists’ recommendations (such as doctors and nutritionists) the most impactful on their purchasing decisions (with an average score of 4.91 out of 6), followed by family’s opinions and promotional campaigns (with 3.86 and 3.81, respectively). ***[Appendix 19]*** Indeed, these results are coincident with the outcomes found on the qualitative research, in which these factors were also the most mentioned *[e.g. "It depends on my family: if they like it, I buy it" (Interviewee 3; Female; 38 yo; GO6/GO7)* or “*My doctor advised me to buy milk from Agros for my children and, since then, I’ve always purchased Agros, even for myself*” *(Interviewee 12; Female; 63 yo; GO5)* and “*If any of the brands I’m used to is on promotion, I tend to choose it" (Interviewee 10; Male; 39 yo; GO3]*. On the other hand, considering both types of research, social media was mentioned as the least relevant factor influencing consumers’ choices, being considered *“not important for this category” (Interviewee 10; Male; 52 yo; GO1).*

Also, milk consumers admit to not actively search for information about the products *[e.g. “I don't search about it because I already have a preconceived idea" (Interviewee 10; Male; 39* *yo; GO1)* or *"My decision is mostly based on habit, I don't search about it"(Interviewee 2; Female; 79 yo; GO6)*]. In fact, 59% of the survey participants "disagreed" with the sentence "*I decide the brand I am going to buy after a deep search and analysis*". Yet, in terms of information channels, TV and radio ads as well as supermarkets' promotional flyers and magazines were considered the most used, followed by the products' labels. Contrarily, social media news and publications were not particularly relevant. ***[Appendix 20]*** Thus, as suggested by Bonchek and France (2013) and Court et al. (2009), there is a variety of touching points in which two-way communications are established. Still, Above-The-Line (ATL) advertising (such as traditional media) continues to be the most commonly used and valued.

e) The Consumer Decision Journey (CDJ)

Based on the results found, in the first phase of the decision-making process, consumers **Consider** a certain number of familiar brands based on their experience (flavour, quality, price and Brand Awareness). After that, they **Evaluate** those brands but, in this category, they do not seem to put much effort on gathering information about brands and products' specificities due to its low-risk and commonly repeated purchase. In fact, as purchasing frequency increases, from the Evaluation phase forward, consumers' behaviours differ. While some are loyal to only one or two brands, being unwilling to change and more influenced by family recommendations and habits; others perceive the brands offered as very similar, so they pre-define a range of brands (from three to ten), switching their choices frequently depending on promotions or advertising campaigns. The first group of consumers represents about 41% of the questionnaire respondents, with half of them agreeing with the sentence *"After trying and liking one milk brand, I stop trying the other brands and I buy it by habit without even thinking"*. Similarly, in the interviews, "*habit*" was the watchword [*e.g. "I don't even think about it, its's a habit" (Interviewee 10; Female; 63 yo; GO5)*]. This means that after the Consideration and Evaluation phases in the first purchase, consumers are locked in the Loyalty Loop. However, despite that, after Buying and Enjoying the brand, they only recommend it to their families and they repeat the purchase in the future, not Advocating it to new potential consumers as they should (they **Buy, Enjoy and Bond**). *[e.g. "For other categories, I would go to the Internet but in this case, I don't recommend or actively search about it" (Interviewee 5; Female; 22 yo; GO7)*]. ***[Appendix 21]*** This behaviour seems to go in line with the theory carried out by Lastovicka (1979), stating that as the level of involvement with the category decreases, consumers become more passive on the Evaluation phase and Bond less with the brands that they choose.

The other type of consumers represents 59% of the survey participants, being more driven by promotions and more price-sensitive. They are more open to try new brands even without a deeper knowledge of their differences. In fact, as per Traylor (1981), although they consider themselves committed to the set of brands purchased, they are not loyal to only one [*e.g. "I am not loyal to only one brand as I tend to choose among those 3 brands, so I am not particularly loyal. Among these 3 brands, the choice is irrelevant for me, since I am used to all of them" (Interviewee 10; Male; 39 yo; GO3)*]. Because of that, these consumers are not in the Loyalty Loop, since after Buying and Enjoying, instead of Advocating and Bonding with the brand, they deliberate about several brands of their consideration set again and select one that might not be the same consumed previously, depending on promotions, in-store activities or store availability *[e.g. "I tend to buy Mimosa but obviously if Agros or Terra Nostra are on sale, since I like them too, I would buy one of those instead of Mimosa*" *(Interviewee 9; Female; 28 yo; GO3)*. Therefore, consumers go through **C*onsider – Evaluate – Buy – Enjoy*** cycle but they are not locked in the Loyalty Loop neither Bond with only one brand. ***[Appendix 22]***

6. CONCLUSIONS AND RECOMMENDATIONS

According to the results presented, Brand Awareness seems to play a major role in consumers' purchase decisions, being used as an important heuristic for choice like it was suggested by Macdonald and Sharp (2000). In fact, most of the consumers tend to purchase and choose only brands that they knew beforehand. Flavour, quality, price and brand awareness seem to influence which brands *enter* the consideration set, while promotions, habits and family traditions/specialists ‘opinions influence the brand(s) *chosen from* the consideration set.

Although brands that offer added-value products such as vegetable milks are prospected to gain market share, they do not seem to have proliferated completely in Portugal since some consumers are not familiar with those products’ distinctive specificities in comparison to “traditional” milk. Also, despite different associations, many brands apparent to be unable to create unique brand benefits, feelings and attitudes towards them so, they need to highlight their Points-of-Difference (POD) to strengthen and differentiate their Brand Image and Positioning. Another particularity of this category is the “power” of private labels. Consumers do not seem to perceive major differences in terms of quality between branded and unbranded products and, consequently, many families purchase retailers’ brands unreservedly. Finally, the increasing intensification of promotions in distribution channels raises new challenges for the brands in the category, as consumers are easily driven by promotions, lying their purchase decisions on it, regardless of any favourable associations towards other brands. In fact, many consumers tend to define a broad consideration set, switching brands indiscriminately.

6.1. Brand Management Strategies and Implications

Considering the consumer decision journey ***[Appendix 23]***, recognized, well-established brands such as Mimosa, Agros, Gresso or Matinal should invest mainly in the behavioural stages of consumer behaviour models (purchase and post-purchase phases), concentrating their communication strategies on creating brand preference, brand purchase and brand loyalty since they have already been considered and evaluated by consumers (showing a strong brand awareness and brand image). Thus, brand communication strategies offering bonus-packs and promotional merchandising can encourage consumers to buy a brand while periodical contests may increase loyalty. Nevertheless, due to its importance in Portugal, targeted TV and radio commercials should also be implemented as they are considered the most used by consumers. Additionally, considering their bargaining power and shelf space, price-offs are also an option. Opposingly, due to their novelty status and lack of knowledge/familiarity among consumers, brands like Alpro or Vive Soy need to focus their communication campaigns on educating and informing clients about their products in order to increase awareness but also to strengthen their image in consumers' minds. In this sense, out-of-home advertising such as in-store displays, event marketing and sponsorship in health and wellness events, as well as knowledgeable, well-trained sales personnel may be useful to attract and retain clients.

Finally, brands such as Parmalat, Terra Nostra and Vigor, whose awareness is high but brand interest and brand preference are lower, could focus on consumer promotions such as giveaways and sampling, creating buzz and increasing brand switching, without losing brand quality perception. This would give consumers an incentive to try the brands while creating interest.

7. LIMITATIONS AND FURTHER RESEARCH

Despite the valuable insights of the present research, it also has some limitations. Firstly, a single product category was examined, which, although it is expected to hold true for similar common repeated purchase categories with low involvement and low risk, might not be applicable to other high-involvement categories. Therefore, the analysis should be done further by investigating other product classes and consumer groups. Moreover, the study assesses consumers' opinions at only one moment of time, which does not allow to evaluate possible changes and behaviour tendencies over time. Additionally, despite an expressive and valuable sample for an academic research, a wider sampling frame could lead to different conclusions as well as achieve more accurate results concerning the target population. Finally, respondents were drawn mainly from Portuguese urban areas; therefore, the data may not reflect geographic differences among consumers, comparing to other regions. Thus, future research should examine broader sample populations and, if possible, in different moments of time.

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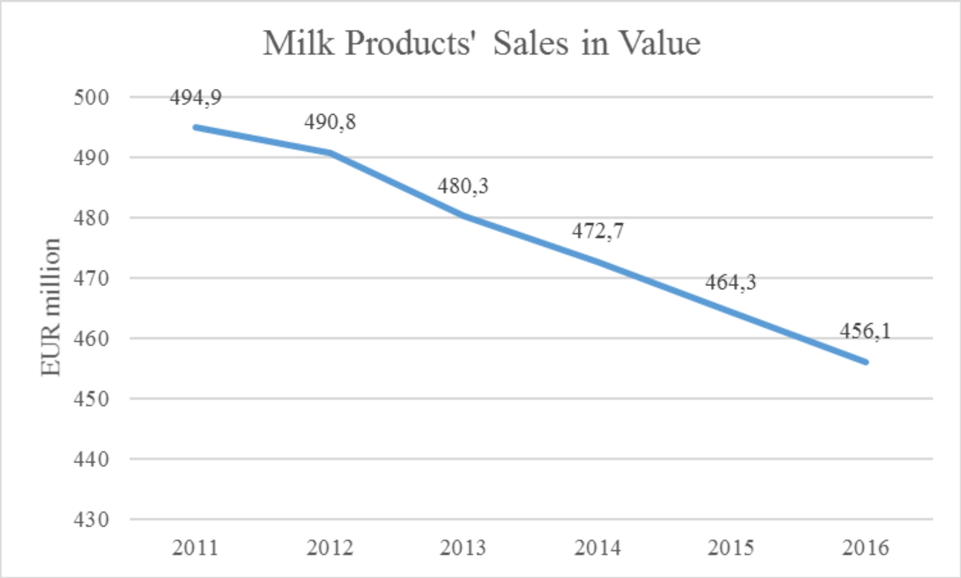
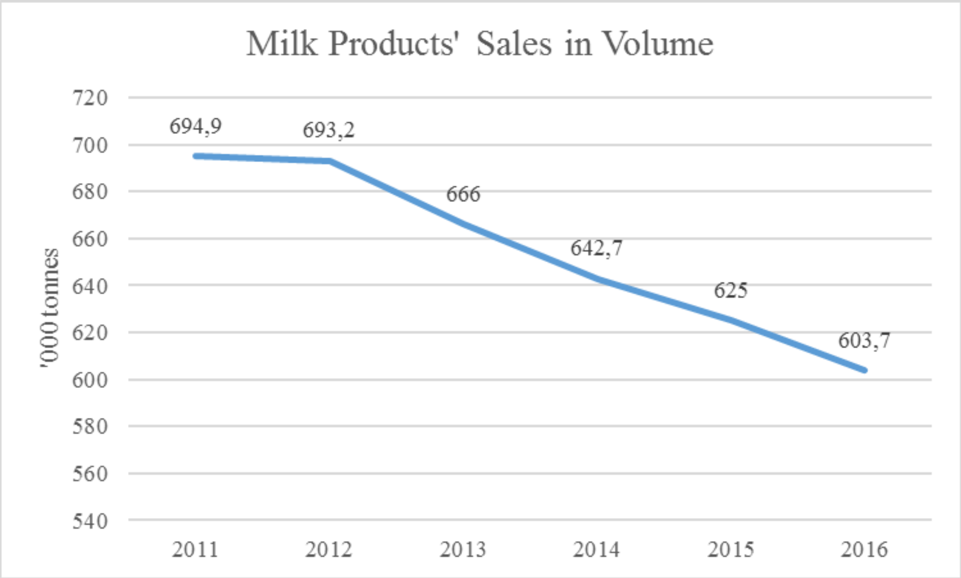
9. APPENDICES

Appendix 1 – Milk Products' Sales in Portugal (Value 2011-2016)



Source: Euromonitor International (2016) from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Appendix 2 – Milk Products' Sales in Portugal (Volume 2011-2016)



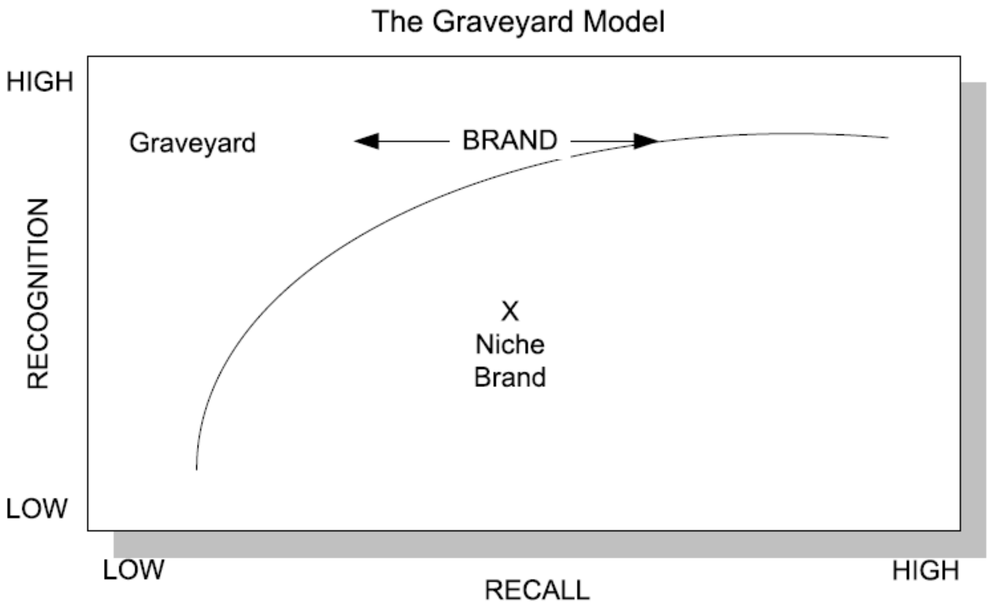
Source: Euromonitor International (2016) from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Appendix 3 - Brand Shares of Drinking Milk Products: % Value 2013-2016

% retail value	**2013**	**2014**	**2015**	**2016**
Mimosa	18.4	18.2	18.3	18.6
Agros	13.8	14.0	14.0	13.9
Gresso	10.8	10.9	10.8	10.7
Continente	8.9	8.8	8.8	8.8
Pingo Doce	8.8	8.8	8.6	8.5
Vigor	4.7	4.7	4.8	4.9
Auchan	4.5	4.6	4.4	4.3
Milbona	4.8	4.6	4.4	4.0
Alpro	2.3	2.6	3.1	3.5
Nova Açores	2.8	3.0	3.3	3.4
Matinal	2.5	2.8	2.8	2.7
Terra Nostra	2.4	2.3	2.4	2.4
Vive Soy	1.3	1.5	1.7	1.9
Ucal	1.8	1.8	1.8	1.8
Parmalat	1.8	1.7	1.7	1.7
Others	10.4	9.7	9.1	8.9
Total	**100**	**100**	**100**	**100**

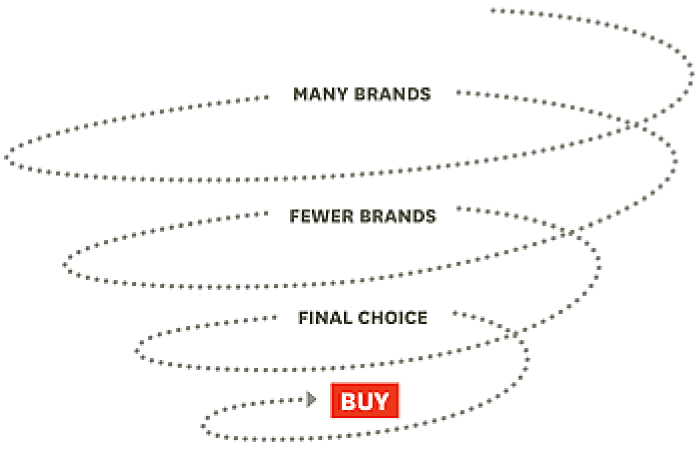
Source: Euromonitor International (2016) from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Appendix 4 – The Graveyard Model



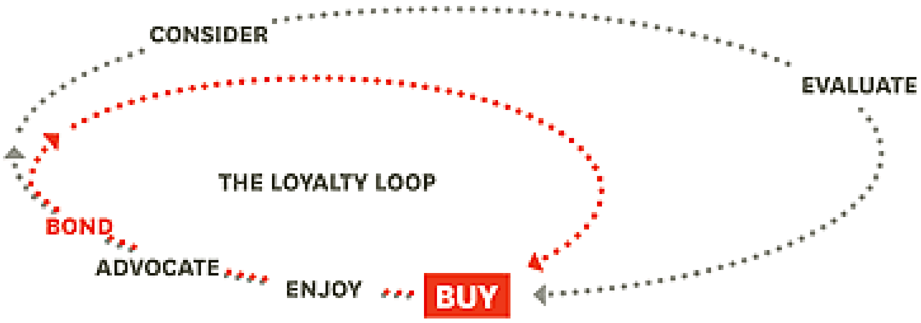
Source: Aaker, David A. 1996. Building Strong Brands.

Appendix 5 – The Funnel Metaphor



Source: Bonchek, Mark, and Cara France. 2013. "Marketing Can No Longer Rely on the Funnel." Harvard Business Review, 1–5.

Appendix 6 - The Consumer Decision Journey (CDJ)



Source: Edelman, David C., and Marc Singer. 2015. “Competing on Customer Journeys.” Harvard Business Review 93 (11): 88–94.

Appendix 7 – Research Timeline

	February				March				April				May			
Review Literature	■	■	■	■												
Define Research Methodology				■												
Analyse Secondary Data					■	■										
Prepare Interview Guide						■										
Conduct Interviews and Gather Insights							■	■								
Fill Interview Grid								■	■							
Analyse Qualitative Data								■	■							
Prepare Questionnaire										■						
Distribute Questionnaire and Collect Responses											■	■				
Analyse Quantitative Data													■	■		
Discuss Results and Conclusions														■	■	

Appendix 8 – Interview Guide

Target: Milk buyers or consumers (independently on the brand but with market knowledge)

Warm-up:
Good morning / afternoon / evening. My name is Mafalda Brito and I'm currently doing my master thesis at the NOVA School of Business and Economics. For my project, I'm conducting a research related to the consumption of packaged milk.
For this purpose, I would like to interview you for approximately 45 to 60 minutes. This implies that after a few short filter questions, we start an in-depth interview, which means that I will start out by asking you a broad question to which you are free to say whatever comes to your mind on the subject. There are not right or wrong answers to that or other questions that may arise.

Just before we start, I must ask you a couple of questions about your profile. With the purpose of analysing the interviews later, I would ask you to record our conversation. It will remain anonymous and you will not be contacted further past this interview.

Pre-recruiting questionnaire:
Filter 1: Are you Portuguese or have you lived in Portugal in the last 5 years?
If yes: Continue to filter 2 | If no: End interview

Filter 2: How old are you?
If the person is more than 18: continue to filter 3 | If no: End interview

Filter 3: Do you purchase or drink packaged milk at least once a month?
If yes: continue to filter 4 | If no: End Interview

Filter 4: Which brands of packaged milk can you recall?
If three or more brands recalled (including Mimosa, Agros, Gresso, Private Labels, Alpro, Nova Açores, Matinal, Terra Nostra, Vive Soy, Ucal, Parmalat, Nesquik, Prado Verde, Président, …): Interview | If less than 3: End Interview

Initial Question:
"Could you tell me about the last time you bought or drank packaged milk? Which brand do you usually purchase or drink and why?

Topics:

1. Decision and purchasing process
    - Influences and motivations (friends, family, WOM, advertising, in-store campaigns, reviews and recommendations, etc)
    - Evaluation criteria/ Characteristics sought and not sought (price, nutrients, health concerns, brand, flavour, availability, innovation, packaging, others)
    - Brands purchased for the household
    - Type of milk purchased (flavours, levels of fat, ..)
    - Reason to choose those brands
    - Loyalty to the brands

- Distribution channel used
- Time and context of shopping
- Frequency
- Volume bought
- Satisfaction with the range available

2. News and Media Channels
   - Information channels and sources used
   - Active or passive search of information
   - Importance of social media reviews, recommendations and WOM in the category
   - Recall of advertising – from which brands? Focus on product or brand attributes?

3. Context of usage
   - Occasion/ Time of the day
   - Mode of consumption
   - Frequency
   - Feelings when using
   - Experience and relationship with the brand purchased
   - Willingness and conditions needed to change to other brands

4. Brand and Category Perceptions
   - Awareness of differences between brands, products and lines
   - Category perceptions and importance of private labels
   - Most valued product and brand attributes within the category
   - Level of involvement with the category vs brand commitment

5. Brand Image
   - Awareness (recall) of milk brands
   - Brand image of recalled milk brands

6. Consumers' Profile
   - Lifestyle
   - Food habits

7. Projective Technique
   - Brand personification for the brands recalled - "What type of person do you see consuming this brand of milk, in terms of age, gender, lifestyle, etc? Why?"

Wrap-up (to be filled by the interviewers)

In order to characterize the whole sample of respondents, could you just indicate the following:

Age (in years): _____________

Nationality: _______________

Gender: ____________

Education | Educação

☐ Can't read / write

☐ Less than 4th grade

☐ 4th grade

☐ 6th grade

☐ 9th grade

☐ 11th /12th grades

☐ Professional or Arts Degree

☐ Incomplete undergrad

☐ Undergrad in Nursign, Social Services, Childcare, Primary Schooling, Tourism, Secretariat, Accounting, Archiving

☐ Other undergrad programs

☐ Post-grad or Masters

☐ PhD

Occupation | Ocupação

☐ GO1 – Middle and Top Management

☐ GO2 – Specialized Technicians and Small Business Owners

☐ GO3 – Employees of Tertiary Sector

☐ GO4 – Qualified / Skilled Workers

☐ GO5 – Unqualified / Unskilled Workers

☐ GO6 – Retired / Unemployed

☐ GO7 – Students

☐ GO8 – Housewives

Thank you very much for your time and feedback – your opinions are really important to my master's thesis research. Have a great day!

Appendix 9 – Interview Grid

	INTERVIEWEE 1	**INTERVIEWEE 2**	**INTERVIEWEE 3**
AGE AND GENDER	42 / Male	79 / Female	38 / Female
EDUCATION	Post-grad or Masters	Undergrad in Primary Schooling	Undergrad in Tourism
OCCUPATION	GO1	GO6	GO6 / GO7
DECISION AND PURCHASING PROCESS			
INFLUENCES AND MOTIVATIONS	"In the gym, people recommended me to buy the biological milk from Agros "	"Sometimes, I may be influenced by promotions but only if I have tried that brand before"	"If my household accepts and likes a brand, I always buy it" + "It depends on my family: if they like it, I buy it"
	Specialists' recommendations	Promotions	Family Opinions
EVALUATION CRITERIA	“It is all about the quality and the flavour that I believe that is much better" + "I prefer to buy Portuguese brands and Agros is the only one that offers biological milk"	"I value mainly price, quality and, sometimes, also the packaging" + "It has to be from a brand that I already know"	"Normally, it is mostly about the packaging and the quality" + "The brand is important but not so important"
	Quality, Flavour and Brand Nationality	Price, Quality, Packaging and Brand Awareness	Packaging, Quality, Brand Reputation
BRANDS PURCHASED FOR THE HOUSEHOLD	"I usually consume biological milk of Agros but, exceptionally, I buy President when Agros is not available"	"Usually, I purchase Mimosa because we are used to it but, sometimes, I also consume others like Agros and Terra Nostra"	"I buy Mimosa because it is the brand that I always buy"
	Agros and Président	Mimosa, Agros and Terra Nostra	Mimosa
TYPES OF MILK PURCHASED	"I only consume semi-skimmed milk"	"I used to buy plain semi-skimmed milk"	"I buy semi-skimmed milk"
	Semi-skimmed	Semi-skimmed	Semi-skimmed
REASON TO CHOOSE THOSE BRANDS	"I choose it because it has a much more intense flavour and it is healthier than the others" + "It is already a habit for me to choose it" + "I see it as a trusted brand, I am really accustomed to it"	"It is the brand we are used to consume at our home" + "It is also about habit; I am used to the flavour and I like it"	"(…) it is the brand that I always buy, I don't look for the other brands" + "I don't buy it by preference but because I believe it is the best" + "I really like the packaging"
	Flavour, Routine and Brand Reputation	Routine, Brand Reputation and Flavour	Routine, Brand Reputation and Packaging

LOYALTY TO THE BRANDS	"My loyalty to Agros is really big as they are almost monopolist in the biological milk market" + "It is already a habit for me to choose it" + "I see it as a trusted brand, I am really accustomed to it"	"I am not unsatisfied with Mimosa, I really like the flavour but, sometimes, I might also try other brands that I like too"	"I am not loyal to any brand but I always buy Mimosa" + "I have never bought any other brand besides Mimosa"
	High	Medium	High
DISTRIBUTION CHANNELS	"I order it through Continente online and they deliver it at my house"	"I am used to purchase through Continente online"	"Usually, I buy it at Pingo Doce"
	Continente	Continente	Pingo Doce
TIME OF SHOPPING, FREQUENCY AND VOLUME BOUGHT	"Normally, I buy it frequently as the date of expiration is shorter than other products" + "A pack with six litres of milk is enough for two weeks"	"I buy it online probably twice a month and they deliver it at house" + "We consume a lot of milk, probably about 24 litres each two weeks"	"I buy it when it is needed, probably once a month" + "I purchase two or three packs"
	Every two weeks - one pack	Every two weeks - four packs	Montlhy - two or three packs
SATISFACTION WITH THE BRANDS AVAILABLE	"Nowadays, there are types of milk for all different tastes and preferences" + "If you go to the supermarket, you have an enormous shelf with a lot of different types of milk"	"There are a lot of brands available (…)"	"There are a lot of different options"
	Satisfied	Satisfied	Satisified
NEWS AND MEDIA CHANNELS			
INFORMATION CHANNELS	"I am not open to any kind of advertising about milk, I just check the brands available at the supermarket, sometimes"	"I like to hear some TV commercials about it and I might try it" + "I only ask for information in the supermarket"	"Although I hear the TV commercials, that is not the reason why I buy Mimosa"
	None	TV Commercials + In-store information	TV Commercials
ACTIVE OR PASSIVE SEARCH OF INFORMATION	"I don't read any articles about milk products and I don't care about its specific composition"	"My decision is mostly based on habit; I don't search about it"	"I don't search about it"
	Passive	Passive	Passive
IMPORTANCE OF SOCIAL MEDIA	"For me, it is completely irrelevant what it comes in the social media about it"	"I don't use social media so it is not important for me"	"I don't use social media to be informed about this category"
	Not important	Not important	Not important

RECALL OF ADVERTISING	"I remember an advertising of Ucal milk but I don't remember exactly how it was"	"I have seen some ads, but now I can't remember any in particular"	"I remember a TV commercial in which children bring to school an extra pack of milk to give to their friends" "I am not sure but I think it is from Mimosa"
	Ucal - can't remember the subject	None	Mimosa - children
CONTEXT OF USAGE			
TIME OF THE DAY, FREQUENCY AND MODE OF CONSUMPTION	"Usually, I drink milk every day in breakfast and, occasionally, at supper, before going to bed" + "At breakfast, I use it to do my own yogurts and at supper, I consume a warm cup of plain milk"	"I am used to consume it on morning at breakfast, every day" + "I don't like plain milk so I always mix it with coffee"	"I don't consume it; I only buy it for my household"
	Every day - breakfast and supper	Every day - breakfast	No consumption
FEELINGS WHEN USED	"I feel satisfaction, it gives me pleasure"	"I feel happy, I like the flavour"	N.A.
	Satisfaction/ Pleasure	Happiness	N.A.
EXPERIENCE AND RELATIONSHIP WITH BRAND PURCHASED	"I am satisfied with the brand; it has accompanied me since my adolescence as it is the milk that I consume since then"	"I started to consume it casually and I like it but it doesn't mean I always choose it, sometimes I try others"	"I buy this brand for over 5 years and it is the brand that it is always drunk here at our home"
	Satisfied/ long and stable relationship	Satisfied/ Volatile relationship	Satisfied/ Stable relationship
WILLINGNESS AND CONDITIONS TO CHANGE	"If there was a similar product, I could try it but I would still consider Agros the brand of excellence"	"I might buy other brands that I like, for instance, if they are on promotion"	"If the other people from my household (who are the real consumers) would like to try another brand, I am not against it"
	Not willing to change	Willing to change - on promotion	Willing to change - family approval
BRAND AND CATEGORY PERCEPTIONS			
AWARENESS OF DIFFERENCES OF BRANDS, PRODUCTS AND LINES	"I easily distinguish the full, semi-skimmed and skimmed milk as well as the chocolate milks" + "More recently, there are also the soy milks and the lactose-free to answer consumers' specificities"	"The main difference between brands is the price" + "Besides the plain milk which is divided in full, semi-skimmed and skimmed, nowadays there are also flavoured milks with chocolate, strawberry, vanilla, etc" + "There are a lot of brands available but, if we try, the flavour is pretty similar"	"The only thing that I pay attention is the level of fat (if it is skimmed, semi-skimmed or full) but the other differences, I don't know" + "Sometimes I get confused about Mimosa and Pingo Doce milks because both have green packaging"
	High awareness	Medium Awareness	Low Awareness

IMPORTANCE OF PRIVATE LABELS	"I would buy other brands as long as they were not private labels because I am not sure about the origin of the milk + " I know that private labels are cheaper but where the milk comes from?"	"In the supermarket, there are a lot of private label milks + "I have also tried the private label and there are no big differences in terms of flavour, it is also good"	"I never choose private labels but I don't know why, honestly"
	Distrust	Indifference	Distrust
CATEGORY PERCEPTIONS	N.A.	N.A.	"I don't like the flavour of milk so I don't have positive associations"
	N.A.	N.A.	Flavour
PRODUCT OR/AND BRAND ATTRIBUTES	"My choice is based mainly on brand attributes because I have always consumed Agros and I trust it"	"I value more the product itself, sometimes the brand doesn't matter a lot"	"I think that, usually, it depends on the quality and the flavour of the milk itself"
	Brand attributes	Product attributes	Product attributes
CATEGORY INVOLVEMENT VS BRAND COMMITMENT	"I would say that my involvement with milk is low but the brand loyalty is really high"	"I don't give much value to the category" + "I am loyal but I don't consume it always"	"My involvement is medium but my level of loyalty is low as I don't consume it" + "But in my household, they are really loyal"
	Low Involvement and High Commitment	Low Involvement and Medium Commitment	Medium Involvement and Low Commitment
BRAND IMAGE			
BRANDS RECALLED	Agros, Gresso, Terra Nostra, Ucal and Mimosa	Mimosa, Terra Nostra, Pingo Doce, Continente and Agros	Mimosa and private labels as Pingo Doce and Continente
BRAND IMAGE OF RECALLED BRANDS	"I see Agros as the tastier and healthier brand"; "For me there are no points of difference between Gresso and Mimosa, they are pretty the same. Terra Nostra is more associated to Açores, due to their origins and naturalness while Ucal is targeted for children who like chocolate, being also distinctive because of the packaging"	"I think that the products offered are all similar. I think that Mimosa and Agros are more reputed and recognized but private brands are also good"	"I think that Mimosa is better accepted by everyone" + "There are a lot of people who buy private labels but I don't have any image as I never tried"
CONSUMERS' PROFILE			
LIFESTYLE	"I practice sports at least 3 times a week"	"I am active and I practice sports"	"I practice sports regularly"
	Active	Active	Active

FOOD HABITS	"I think I have a healthy diet: I avoid red meat, fries and sweets"	"I have health concerns and I avoid products with lots of sugar. I have healthy habits"	"I avoid fast food, soft drinks and alcohol"
	Healthy	Healthy	Healthy
PROJECTIVE TECHNIQUE			
TYPE OF PEOPLE (AGE, GENDER, LIFESTYLE)	Agros - "active population, in the middle age with high income and health concerns"; Mimosa and Gresso - "probably women how buy milk for the all family, average income and age"; Terra Nostra - "consumers how value the Azores origins of the product, older people with high income"; Ucal - "mainly teenagers or mothers how buy it from their children"	Pingo Doce and Continente - "any kind of people could purchase it but maybe women in their 20's"; Mimosa - "Skinny women who practice sports and have health concerns"; Agros and Terra Nostra - "Older people or mums who are purchasing for their children"	Mimosa - "Families and adults who avoid private labels and in which price is irrelevant"; Pingo Doce - "Probably people with lower incomes as it usually cheaper, probably teenagers and mothers"

	INTERVIEWEE 4	**INTERVIEWEE 5**	**INTERVIEWEE 6**
AGE AND GENDER	52 / Male	22 / Female	67 / Male
EDUCATION	Other undergrad programs	Masters	PhD
OCCUPATION	GO1	GO7	GO6
DECISION AND PURCHASING PROCESS			
INFLUENCES AND MOTIVATIONS	"I am not influenced by advertising, but I value the opinion of my children as they are also consumers"	"I follow my family preferences as we keep consuming the same brand since I remember, but I am not influenced by advertising, promotions or friends' recommendations"	"I suppose everyone is influenced by advertising, nowadays, but I read about this brand for the first time in a newspaper article" + "This milk as regularly on promotion, which is good"
	Family Opinions	Family Recommendations/ Opinions	Advertising/ Promotions
EVALUATION CRITERIA	"I value the reputation and quality of the brand that I already know" + "The nutritional characteristics of the product are irrelevant for me"	"I would say the quality and the packaging as Mimosa is really innovative" + "I would say the brand itself is important"	"It has to have quality, a good flavour and an acceptable price" + "I don't think that the brand is really important"
	Brand Reputation	Quality, Packaging and Brand Reputation	Quality, Flavour and Price

BRANDS PURCHASED FOR THE HOUSEHOLD	"I only purchase and consume Mimosa, semi-skimmed"	"We purchase Mimosa to direct consumption and Agros to bake cakes"	"I usually purchase Terra Nostra"
	Mimosa	Mimosa and Agros	Terra Nostra
TYPES OF MILK PURCHASED	"I only purchase and consume Mimosa, semi-skimmed"	"From Mimosa, it is semi-skimmed and lactose-free; from Agros it is full"	"I purchase skimmed milk"
	Semi-skimmed	Semi-skimmed, lactose-free and Full	Skimmed
REASON TO CHOOSE THOSE BRANDS	"I buy Mimosa for habit but also because they have smaller packaging which is useful for people who don't consume much milk as they can open it just when needed"	"The quality is inherent to the brand and it has never disappointed me"	"I appreciate the flavour and the fact that cows are created naturally, consuming only vegetables"
	Routine, Packaging	Brand Reputation and Quality	Flavour and Origins
LOYALTY TO THE BRANDS	"My relationship is based on habit: I am used to drink Mimosa and I passed that to my children" + "As I am not an extremely regular consumer, I haven’t such a strong relationship with brands"	"My loyalty is almost 100%" + "I am loyal to the brand; I always choose it so I would say the brand itself is important"	"Until now, I am 100% loyal and satisfied"
	Medium	High	High
DISTRIBUTION CHANNELS	"I go to Pingo Doce and I purchase monthly about two or three packs (of six litres each) maximum"	"I buy it in Pingo Doce or Continente, at weekends probably a pack of six litres once a week"	"Usually, I buy it when it is on promotion so I either buy on Pingo Doce, Jumbo or Continente"
	Pingo Doce	Pingo Doce or Continente	Pingo Doce, Jumbo or Continente
TIME OF SHOPPING, FREQUENCY AND VOLUME BOUGHT	"We buy it monthly or sometimes when we run out of milk"	"I buy it in Pingo Doce or Continente, at weekends probably a pack of six litres once a week"	"Usually, I buy it when it is on promotion" + "I buy one or two packs (of six litres) for month"
	Monthly	Weekly - one pack	Monthly - one or two packs
SATISFACTION WITH THE BRANDS AVAILABLE	"I think there are many brands in the market"	"Although I don't switch between brands, I think there is a wide variety of brands for those who like to try it"	"I am satisfied, there are many brands"
	Satisfied	Satisfied	Satisfied
NEWS AND MEDIA CHANNELS			

INFORMATION CHANNELS	"I only use TV commercials"	"For this category, I only watch the commercials and I think they don't give much information about the products"	"I don't see much TV, I only use supermarkets' flyers and promotional magazines" + "I try to read what is in the labels, to understand the ingredients"
	TV Commercials	TV Commercials	Supermarkets' flyers and promotional magazines
ACTIVE OR PASSIVE SEARCH OF INFORMATION	"Although I don't search actively for information, I pay attention to the category advertising and campaigns"	"For other categories, I would go to the Internet but, in this case, I don't recommend or search actively about it"	"My knowledge is only based on advertising, usually I don't search deeper about milk"
	Passive	Passive	Passive
IMPORTANCE OF SOCIAL MEDIA	"For me, social media is not important for this category as I don't resort it to study this kind of products"	"For our age group, I don't think social media has a major role in this category decisions" + "I would not switch brands because of social media, maybe try but not change"	"I don't use social media so the importance of me is zero"
	Not important	Not important	Not important
RECALL OF ADVERTISING	"I remember a TV ad in which children were playing and the purpose was emphasizing the benefits of milk. But I don't remember the brand, maybe Mimosa"	"I think Agros commercials have cows and I remember a Mimosa advertising showing the benefits of their product in terms of nutritional composition"	"I remember the advertising that is on Terra Nostra packaging, stating that their milk comes from happy cows"
	Mimosa - children	Agros - cows and Mimosa - product's benefits	Terra Nostra - happy cows
CONTEXT OF USAGE			
TIME OF THE DAY, FREQUENCY AND MODE OF CONSUMPTION	"I consume coffee with milk every day at breakfast"	"I consume it once a week in the morning or at supper; always plain and warm in cup or with cereals"	"I consume it at breakfast every day with chocolate"
	Every day - breakfast	Weekly - breakfast and supper	Every day - breakfast
FEELINGS WHEN USED	"It was the first and tastier meal of the day so it is important"	"I feel healthy and concerned about myself"	N.A.
	Flavourness	Healthy	N.A.
EXPERIENCE AND RELATIONSHIP	"I am satisfied, I have no complains and I consume this brand for 10 or 12 years"	"It is the brand I used to consume when I was a child and even now I maintain the same relationship with the brand"	"I have tried this brand, I liked it and since then I haven't change it" + "I am satisfied, the flavour is consistent"
	Satisfied/ Long relationship	Long relationship	Satisified/ Stable relationship

WITH BRAND PURCHASED			
WILLINGNESS AND CONDITIONS TO CHANGE	"I was willing to change from other brand but only if they presented distinguishing characteristics"	"My willingness to change is low; maybe try others but not change" + "Only if it was even healthier than the ones in the market"	"This brand is not always available in the supermarkets so probably in the future, I will have to choose another brand"
	Willing to change - stronger points of difference	Not willing to change - nutritional composition	Willing to change - store availability
BRAND AND CATEGORY PERCEPTIONS			
AWARENESS OF DIFFERENCES OF BRANDS, PRODUCTS AND LINES	"Although I don't know all the differences between brands, I am aware that there are variations in terms of nutritional composition across products lines" + "I don't look specifically for the characteristics of the products so I don't know if they have calcium, gluten, lactose or other components"	"I know the distinction between full, skimmed and semi-skimmed but I am aware that nowadays there are also more variety of flavoured milks"	"I know the 3 types of milk in terms of fat (skimmed, semi-skimmed and full), the ones lactose free, the ones enriched with calcium, the ones with soy, the milk with chocolate flavour and the powder milk"
	Low Awareness	Medium Awareness	High Awareness
PRIVATE LABELS	"I don't think that private brands have less quality than the others in the market"	"I don't consume private brands"	"I have tried before private labels but the quality of milk depends on each brand" + "I don't think there are much differences between branded and unbranded milks"
	Indifference	Distrust	Indifference
CATEGORY PERCEPTIONS	"I strongly associate the category to Azores due to their origin and reputation"	"I think milk is an essential product, associated to wellness and health"	"I think that milk is an important product, however since it is from animals, we should be careful about its origins"
	Açores	Wellness and Health	Important and Animals
PRODUCT OR/AND BRAND ATTRIBUTES	"I think the brands communication is focused mainly on product attributes such as level of fat, calcium, etc"	"I think the brand attributes are important but the product itself also has to be good"	"I think it depends mainly on the product and the way the brand communicates through advertising"
	Product attributes	Brand and Product Attributes	Brand and Product Attributes

CATEGORY INVOLVEMENT VS BRAND COMMITMENT	"The level of involvement is low while the loyalty to the brand would be medium"	"The level of involvement is medium but the loyalty is high"	"I think the category is really important and my level of loyalty until now is 100%"
	Low Involvement and Medium Commitment	Medium Involvement and High Loyalty	High Involvement and Commitment
BRAND IMAGE			
BRANDS RECALLED	Mimosa, Agros, Continente and Pingo Doce	Mimosa, Ucal and Agros	Mimosa, Ucal, Nova Açores, Terra Nostra and private labels
BRAND IMAGE OF RECALLED BRANDS	"Mimosa and Agros are both consolidated brands in the market with tradition and reputation; I believe that private brands have quality too, I don't have any suspicion about them"	"Mimosa is synonym of freshness, quality and health, Agros is inferior to Mimosa and I perceive it as less healthy because we use it to bake cakes. Ucal is for children who love chocolate"	"My associations to Mimosa are not positive as I have tried and I didn't like it but I think it is the most important and consumed in the market"; "I associate Ucal to chocolate milk probably based on what I see in supermarkets"; "Terra Nostra is agradable, from happy cows", "When I think about Nova Açores, it only comes to my mind Azores"; "Private labels? It depends on each brand. I used to consume Lidl brand before and I liked it"
CONSUMERS' PROFILE			
LIFESTYLE	"I have a sedentary life and I practice sports rarely"	"I am concerned about my health that is why I keep consuming milk and I practice sports regularly"	"I have a more sedentary life"
	Sedentary	Active	Sedentary
FOOD HABITS	"I don't have many food restrictions"	"I don't follow a strict diet but I avoid sweets and fries"	"I try to avoid additives as I tend to prefer natural food"
	Indifferent	Healthy	Healthy
PROJECTIVE TECHNIQUE			

TYPE OF PEOPLE (AGE, GENDER, LIFESTYLE)	Mimosa - "young women with higher income who prefer branded products and parents how buy milk to their children"; Agros - "older people how are not driven by price"; Pingo Doce and Continente - "people from every age how values mainly price"	Mimosa - "any age group, with higher income, healthier and worried about their diet"; Gresso - "any person who loves baking cakes and who doesn't value particularly the brand purchased", Ucal - "teenagers who love chocolate"	Mimosa - "People between 30 and 50 years old how value advertising and social media"; Nova Açores - "I have no idea …"; Terra Nostra - "older people how care about the happiness of the cows and how value natural products without additives"; Private labels - "people who are driven by price and from whom the brands are all the same"; Ucal - "people who like chocolate"

	INTERVIEWEE 7	**INTERVIEWEE 8**	**INTERVIEWEE 9**
AGE AND GENDER	56 / Female	52 / Female	28 / Female
EDUCATION	PhD	Masters	Other undergraduate programs
OCCUPATION	GO1	GO1	GO3
DECISION AND PURCHASING PROCESS			
INFLUENCES AND MOTIVATIONS	"I am influenced by family recommendations, otherwise, I haven't tried this brand" + "I heard it but I still buy the same brand"	"I don't care about advertising but, obviously, the opinion of my household is important" + "I am not driven by promotions but it is on sale, I tend to purchase more volume"	"Usually, I buy the brand that is on promotion, it is not related to others' recommendations"
	Family Opinions	Family Opinions	Promotions
EVALUATION CRITERIA	"As I only drik skimmed milk, I value quality and flavour" + "The brand itself doesn't have impact"	"I always analyse the nutritional composition in terms of fat and levels of calcium but I also value the price and the flavour"	"I value the flavour because I don't like all types of milk so as long it is a milk that I like, I purchase it!"
	Quality and Flavour	Nutritional Composition, Price and Flavour	
BRANDS PURCHASED FOR THE HOUSEHOLD	"I only consume Terra Nostra and from what I know, it is the tastier"	"I always purchase selected milk from Pingo Doce and sometimes I also buy flavoured milks from Mimosa"	"I am used to buy Mimosa but there are also other brands that I like as Agros and Terra Nostra, mainly" + "Sometimes, I also buy soy milk from Vive Soy as I am allergic to one of cow milk proteins"

	Terra Nostra	Pingo Doce and Mimosa	Mimosa, Agros, Terra Nostra and Vive Soy
TYPES OF MILK PURCHASED	"I only drink skimmed milk but I purchase also semi-skimmed milk for my son"	"We consume two different types of milk: skimmed and semi-skimmed, depending on our preferences"	"I only buy semi-skimmed milk" + "Sometimes, I also buy soy milk"
	Skimmed and semi-skimmed	Skimmed, semi-skimmed and flavoured	Semi-skimmed, Vegetable
REASON TO CHOOSE THOSE BRANDS	"I think it is the tastier and the packaging is really convenient, but, even with a different packaging, I would still purchase it"	"It is not one of the most expensive and it has good flavour, good texture and a convenient cap bottle" + "I buy Mimosa because Pingo Doce doesn't have flavoured milk with small packaging"	"It's the flavour! I have tried others like Gresso but it doesn't taste the same" + "It is a habit for me, I am used to buy those"
	Flavour and Packaging	Price, Flavour and Packaging	Routine, Flavour
LOYALTY TO THE BRANDS	"I never buy other brand; I always purchase Terra Nostra" + "The product is relatively new in the market so I don't consume it for many years"	"I am absolutely loyal to the brand" + "After analysing the labels, if I like it, I always choose the same brand"	"I tend to buy Mimosa but obviously if Agros or Terra Nostra are on promotion, since I like them too, I would buy one of those instead of Mimosa" + "I am loyal to those three brands, I would rarely choose others"
	High	High	Low
DISTRIBUTION CHANNELS	"I buy it in the supermarket I know it is on promotional campaign, either Pingo Doce, Continente or Jumbo"	"I do shopping at Pingo Doce as it is near to my house"	"I usually go to Continente"
	Pingo Doce, Continente or Jumbo	Pingo Doce	Continente
TIME OF SHOPPING, FREQUENCY AND VOLUME BOUGHT	"I buy it once each three weeks and I purchase about three or four packs (six litres each)"	"Every two weeks, I buy one or two packs (of six litres) of milk: skimmed and semi-skimmed"	"I only buy once a month because we are only two people so we only buy a pack of six litres and it is enough"
	Every three weeks - three or four packs	Every two weeks - one or two packs	Monthly - one pack
SATISFACTION WITH THE BRANDS AVAILABLE	"I think there are too many brands, actually"	"There is a wide variety of products, for people how want to try new flavours"	"I am satisfied with the variety for the type of milk that I buy but there many other products and brands for those of like it "
	Dissatisfied	Satisfied	Satisfied
NEWS AND MEDIA CHANNELS			

INFORMATION CHANNELS	"I don't care much about advertising"	"I read carefully the labels of the products and I analyse the nutritional composition, levels of calcium, sugar" + "I compare the prices and characteristics of different products"	"When supermarkets deliver their flyers and magazines with promotional campaigns, I take a look to check if there is something I would like to buy"
	None	Products' Labels	Supermarkets' flyers and promotional magazines
ACTIVE OR PASSIVE SEARCH OF INFORMATION	"Definitely, I don't search actively for information"	"Sometimes, when a new product is launched, I analyse the different labels again to make sure I choose healthy milks" + "I search actively for the characteristics of the product"	"I don't search about it, when I arrive at the supermarket, I check it"
	Passive	Active	Passive
IMPORTANCE OF SOCIAL MEDIA	"I don't use social media so it has no impact"	"I confess that for me the impact of social media is null, I don't care about it"	"I think it is important: if I see a promotion or advertising on social media, probably when I go to the supermarket, I remember it and I would be more willing to try"
	Not important	Not important	Important
RECALL OF ADVERTISING	"I remember Terra Nostra advertising about the happy cows because of the music in the commercials"	"I remember a commercial in which children were asking their mothers to bring extra packs of milk for their friends. But I can't remember the brand " + "And there was also other from Matinal, with a white petal or flower to promote the pureness of the milk"	"I don't remember any specific campaign …"
	Terra Nostra - happy cows	Can't remember the brand - children and Matinal - white flower	None
CONTEXT OF USAGE			
TIME OF THE DAY, FREQUENCY AND MODE OF CONSUMPTION	"Every day, I tend to drink milk along the day, always with coffee"	"Every day, in the morning, all my family drink milk and sometimes, we also consume it in the afternoon" + "Normally, we consume it with coffee or cereals"	"I usually drink plain milk, mainly at supper. Probably, three or four times a week"
	Every day - along the day	Every day - breakfast and afternoon snack	Three or four times a week - supper

FEELINGS WHEN USED	"I like it and it tastes good but I don't have specific feelings about it"	"It's warm and comforting"	"I drink it because people say it is healthy"
	Flavourness	Comfort	Healthy
EXPERIENCE AND RELATIONSHIP WITH BRAND PURCHASED	"I think the relationship with the brand is good, I like it" + "The product is relatively new in the market so I don't consume it for many years" + "But sometimes, the brand is not available in the market"	"I consider myself satisfied. I think I consume it for three or four years"	"My parents used to buy Mimosa and sometimes also Terra Nostra so I think that it has impact. Probably along the years, I got used to consume it too" + "I don't know, maybe it is about my parents' habits. But it is in the family because my grandmother used to buy also Mimosa"
	Satisfied/ Stable relationship	Satisified/ Stable relationship	Long relationship
WILLINGNESS AND CONDITIONS TO CHANGE	"If this brand disappears, I would have no solution! I would have to change, probably Lidl as I used to consume before. Ohterwise, I would keep loyal to this brand."	"I would buy other brand only if I perceive they have the same characteristics but they were cheaper"	"I would change it if I test it and I like it. It is mainly about the flavour"
	Not willing to change	Willing to change - price	Willing to change - flavour
BRAND AND CATEGORY PERCEPTIONS			
AWARENESS OF DIFFERENCES OF BRANDS, PRODUCTS AND LINES	"I know a wide variety of milks: full, skimmed, semi-skimmed, with extra calcium and vitamins, powder and flavoured with chocolate, strawberry, etc"	"Besides the plain milk, I also know that there are flavoured milks with strawberry, vanilla, chocolate, nestum" + "The main differences among brands are price and packaging"	"Besides the plain milk, Mimosa has a lot of flavoured milks with chocolate, strawberry, vanilla" + "I am not used to analyse the labels and the specificities of each product"
	High Awareness	Medium Awareness	Medium Awareness
PRIVATE LABELS	"It depends: I have consumed before Milbona from Lidl and it was really good but then the one from Pingo Doce is bad"	"I have the idea that the milk from other private labels is waterier"	"I have tried Auchan milk once but the flavour is different, it is waterier. But, I checked the nutritional composition and it isn't very different from branded milks"
	Indifference	Distrust	Doubt
CATEGORY PERCEPTIONS	"I think milk is indispensable for a healthy diet but the types of milk are really different among each other"	"I think that milk is a healthy product. I associate it to breakfast and family"	"I associate milk to cows"

	Indispensable and Healthy	Healthy, Breakfast and Family	Cows
PRODUCT OR/AND BRAND ATTRIBUTES	"For me, the brand is not important, it's more about the characteristics of the milk itself and its composition"	"I would say that the flavour and the price are the most important attributes, I don't care about the brand"	"Maybe the brand is also relevant as it is the one I am used to, probably because of my family tradition of buying it"
	Product Attributes	Product Attributes	Brand Attributes
CATEGORY INVOLVEMENT VS BRAND COMMITMENT	"It is an important category for me, and I am loyal to the brand as long as it maintains the same characteristics"	"My level of involvement is medium while the loyalty is high"	"I am loyal to the brand, I buy the same brands almost every time, but I don't search about milk"
	High Involvement and Commitment	Medium Involvement and High Commitment	Low Involvement and High Commitment
BRAND IMAGE			
BRANDS RECALLED	Agros, Mimosa, Parmalat, Ucal, Terra Nostra e Nova Açores	Pingo Doce, Continente, Auchan, Agros, Mimosa, Ucal and Matinal	Mimosa, Agros, Terra Nostra, Vive Soy, Nova Açores, Auchan, Continente
BRAND IMAGE OF RECALLED BRANDS	"About Mimosa, the green packaging is really attractive; "Parmalat packaging is also different and original, more premium and rare "; "Agros is not a significant brand for me, I have negative associations as the milk tastes bad"; "I remember Ucal due to other products of the brand"; "Terra Nostra is the tastier, associated to cows"	"I think Pingo Doce is a trusted and competitive brand"; "Continente is cheaper but with less quality"; "Auchan is known by having good products and very good prices"; "Matinal has more quality and it is positioned for people with higher economic conditions"; "Agros is a trusted brand associated to family with a good product"; "I associate Ucal to chocolate"; "Mimosa is very similar to Agros, maybe just a little better"	"I remember Mimosa because of the green packaging and I associate it to milk and butter. The advertising is more directed to children and parents as they have more variety of products for them"; "Agros is similar to Mimosa, and the price is also similar"; "Terra Nostra is more about milk and cheese, more related to Azores"; "Private labels are all very similar"; "Vive Soy is the first one that I tried from soy and it is more expensive"
CONSUMERS' PROFILE			
LIFESTYLE	"I think I am an active person and I practice sports sometimes"	"Maybe we should practice more sports but I think we have a healthy life as we go to gym when it is possible"	"I don't practice sports"
	Active	Active	Sedentary
FOOD HABITS	"I think I have healthy habits (…) I avoid fried food"	"I really care about my diet, so I pay attention in the supermarkets to the products I purchase to make sure they are healthy"	"I have some food restrictions but I eat everything"

	Healthy	Healthy	Indifferent
PROJECTIVE TECHNIQUE			
TYPE OF PEOPLE (AGE, GENDER, LIFESTYLE)	Private labels - "older people or people with lower incomes"; Mimosa - "adults who value more specific products since Mimosa has a wide variety of milks"; Terra Nostra - "probably people from 40's how value quality and that have higher income"; Agros - "it's a regular milk so probably people from any age or gender"; Ucal - "I have no idea because I just know the name"; Parmalat - "people with health concerns who care about the nutritional compositions"; Nova Açores - "adults in the middle age"	Pingo Doce -"younger (20s) or older (60's) people who are driven by price and have lower income"; Ucal - "parents who purchase it for their children"; Agros and Mimosa - "numerous families with age between 30's and 50's"; Matinal - "it is more for elite consumers, who are more concerned about their diet and are not driven by price"	Mimosa - "Probably mothers and parents who buy milk for their children"; Terra Nostra - "probably older people with exquisite taste, who likes Azores"; Agros - "the advertising is broader, I think they don't have a specific target, it is for everyone"; Private labels - "people with lower budget available or maybe those who value the flavour"; Vive Soy - "Younger people who are intolerant to lactose or milk proteins, vegetarians"

	INTERVIEWEE 10	INTERVIEWEE 11	INTERVIEWEE 12
AGE AND GENDER	39 / Male	27 / Female	63 / Female
EDUCATION	11th / 12th grades	11th / 12th grades	6th grade
OCCUPATION	GO3	GO4	GO5
DECISION AND PURCHASING PROCESS			
INFLUENCES AND MOTIVATIONS	"I am not influenced by others' opinions but the factor price is important. If any of the brands that I am used to is on promotion, I tend to choose it"	"My decision is based on my personal preferences; I don't care about others' opinions nor promotions"	"My doctor advised me to buy milk from Agros for my children and since then, I always purchase it even for me" + "Even when other brands are on promotion, I always choose Agros" + "It is also dependent on my household because there are all used to this brand"
	Promotions	None	Specialists' and family opinions

EVALUATION CRITERIA	"In terms of image, I don't care. I evaluate the quality and I only choose national brands. In terms of flavour, they are all very similar."	"I buy milk because I like it and because of the calcium levels. I care mostly about the nutritional composition and the flavour" + "It is mainly because of the taste but the packaging also attracts me"	"I don't know exactly why I buy it but I think it is mainly because of the flavour, since the other brands don't taste so good."
	Quality, Brand Nationality, Flavour	Nutritional Composition, Flavour and Packaging	Flavour
BRANDS PURCHASED FOR THE HOUSEHOLD	"I only drink milk sometimes but usually, I buy Gresso, Mimosa or more usually Agros"	"I usually purchase Matinal and Mimosa" + "The soy milk is from Alpro and the chocolate milk is from Parmalat or Agros"	"I always purchase and drink Agros"
	Agros, Gresso and Mimosa	Matinal, Mimosa, Alpro and Parmalat	Agros
TYPES OF MILK PURCHASED	"I prefer semi-skimmed milk because it has intermediate level of fat. I also buy chocolate flavoured milk for my son"	"I buy skimmed and semi-skimmed milk" + "I also buy chocolate flavoured milk for my son and soy milk for my husband"	"I have tried skimmed milk but I didn't like it so I always purchase semi-skimmed"
	Semi-skimmed and chocolate flavoured	Skimmed, semi-skimmed and chocolate flavoured	Semi-skimmed
REASON TO CHOOSE THOSE BRANDS	"Probably because they are the brands that are in the market for long times and it gives me more confidence to buy them"	"I really like Matinal, it is more expensive but I like the flavour as well as the packaging with cap bottle, which is more convenient to keep in the fridge. About Mimosa, it has a good value for money" + "Alpro is expensive but it is better than private labels and it is always available in the supermarket."	"I am used of consuming Agros, it is already a habit for me. I like the flavour so I always purchase it" + "It is the brand that my family is also used to"
	Brand Reputation	Price, Flavour, Packaging and Value for Money	Routine, Family and Brand Reputation
LOYALTY TO THE BRANDS	"I only purchase national brands but I am not loyal to only one brand as I tend to choose among those 3 brands, so I am not particularly loyal" + "Among these 3 brands, the choice is irrelevant for me as I am used to all of them"	"When I purchased Matinal for the first time, I really liked and I started to buy it since then" + "I tried once because it was on promotion and since then, I realized it is much better so I always buy it"	"I think it is mainly based on habit. Me and my family are used to this brand and we have always purchased it so when I change it, they don't like it" + "We drink Agros since the 80' when my son was a child. I never try others because if I do, they don't consume it"
	Low	High	High

DISTRIBUTION CHANNELS	"I buy it every week in Pingo Doce"	"I go to Pingo Doce and Continente sometimes"	"I buy it either in Continente either in Pingo Doce"
	Pingo Doce	Pingo Doce and Continente	Continente and Pingo Doce
TIME OF SHOPPING, FREQUENCY AND VOLUME BOUGHT	"Generally, I buy a pack (of 6 litres) every week"	"I buy at maximum 6 litres per week"	"When I have car, I buy more milk, probably like 12 litres"
	Weekly - 1 pack	Weekly - 1 pack	2 packs
SATISFACTION WITH THE BRANDS AVAILABLE	"The variety meets my expectations."	"I think there are too many brands in the market, people get confused"	"I have tried almost all the brands in the market, there are a lot of products available"
	Satisfied	Dissatisfied	Satisfied
NEWS AND MEDIA CHANNELS			
INFORMATION CHANNELS	"I know that there are several campaigns and advertising but I am not influenced by them" + "If I have any question, I ask to the supermarket's employees" + "I don't watch a lot of TV"	"I believe that information channels are important because they give us extra information that otherwise, we wouldn't have access to. However, I don't pay much attention"	"I watch it mainly in TV commercials but sometimes I also use supermarkets' flyers and magazines" + "I don't waste time searching for information"
	In-store information	None	TV commercials + Supermarkets' flyers
ACTIVE OR PASSIVE SEARCH OF INFORMATION	I don't use information channels for that purpose, I don't search about it because I have already a preconceived idea"	"When my son was younger, I used to be more concerned about it, now I don't pay so much attention to products' information"	"I search about it through supermarkets' flyers and then, if I have any doubt, I ask to my son for his advice"
	Passive	Passive	Passive
IMPORTANCE OF SOCIAL MEDIA	"I never noticed that there were many advertising campaigns in Internet in the milk category but I am not a biggest fan of social media"	"I don't care because I don't use it"	"For me, social media is not important but maybe for others, it might help"
	Not important	Not important	Not important
RECALL OF ADVERTISING	"I remember Matinal commercials focusing on the brand attributes with a white flower and a woman dressed with white clothes"	"I only remember Mimosa commercials but I don't remember what was it about"	"I remember one, I think it is from a Azores brand. But the content, I can't recall exactly"
	Matinal - white flower	Mimosa - can't remember the subject	Nova Açores - can't remember the subject

CONTEXT OF USAGE			
TIME OF THE DAY, FREQUENCY AND MODE OF CONSUMPTION	"I only consume it every day in the morning and always with coffee"	"I drink milk in the morning and with coffee, about 3 to 4 times a week, maybe"	"I drink milk every day in the morning, normally a cup of warm plain milk."
	Everyday - breakfast	3 or 4 times a week - breakfast	Everyday - breakfast
FEELINGS WHEN USED	"I like it but I feel regret because I think it makes me feel stomach aches sometimes"	"I feel I shouldn't drink it because for my age, it is worthless"	"I feel good and it is a way of eating something before going to work"
	Regret	Regret	Good
EXPERIENCE AND RELATIONSHIP WITH BRAND PURCHASED	"I only consume national brands and I am satisfied with them"	"I am satisfied, that is why I keep buy them. My experience is good; I already buy by habit"	"I have tried other brands but I always go back to Agros. I like it and I am used to it so I am satisfied"
	Satisfied	Satisfied/ Stable relationship	Satisfied/ Stable relationship
WILLINGNESS AND CONDITIONS TO CHANGE	"Probably, for that, advertising campaigns focusing on the benefits of the product would be necessary to convince me to change it"	"I was willing to change.if I tried another milk that I like, I would purchase it. But it would have to have low levels of fat, otherwise I don't appreciate it"	"I would only change to other brands if it makes me good because something I try others and they make me feel stomach aches"
	Willing to change - nutritional composition	Willing to change - nutritional composition	Willing to change - nutritional composition
BRAND AND CATEGORY PERCEPTIONS			
AWARENESS OF DIFFERENCES OF BRANDS, PRODUCTS AND LINES	"I know that are milk without lactose but I haven't decided to buy it, yet" + "Although I don't buy them, I think I am an informed consumer as I am familiar with milk lactose free, soy milks and flavoured milks with strawberry and vanilla" + "I think all the brand have similar lines of products but maybe the ones from Azores tend also to offer cheese products" + "I am a consumer for many years so I already have knowledge about the products that I consume"	"There are so many lines. It is for growth, extra calcium, lactose free, … And then, there are also milks from coco, almond, rice and soy that I know that exist but I have never tried"	"Besides the plain milk and chocolate flavoured milk, I don't know any other lines." + "I only know the types of products that I use to consume."
	High Awareness	High Awareness	Low Awareness

PRIVATE LABELS	"I have already consumed milk from Continente and honestly, I didn't notice a big difference in terms of flavour but there is always some distrust about the quality of the product" + "I heard that the origin of private label milks is the same and the only differences are the packaging and the price"	"Before I start consuming Matinal, I used to purchase Continente milk"	"I think that, nowadays, private labels are identical to other brands. Maybe with a little bit less quality but they are almost the same"
	Doubt	Indifference	Indifference
CATEGORY PERCEPTIONS	"I associate milk mainly to their benefits namely the levels of calcium"	N.A.	"I don't make any kind of associations, I don't even think about it, its's a habit"
	Calcium	N.A.	Habit
PRODUCT OR/AND BRAND ATTRIBUTES	"I think that the product benefits are more important than the brand itself"	"I choose the product and then, I associate it to a specific brand"	"I would say both, brand and product attributes are both important"
	Product Attributes	Brand and Product Attributes	Brand and Product Attributes
CATEGORY INVOLVEMENT VS BRAND COMMITMENT	"I think I am more involved with other categories so I would say that the level of involvement is medium" + "The brand commitment is low, only among those that I normally purchase"	"The involvement is medium and the brand commitment too because although I tend to purchase always the same brand, I don't think I am 100% loyal"	"I am not particularly involved with the category as, in fact, I don't search about it but I think that my loyalty is high"
	Medium Involvement and Low Commitment	Medium Involvement and High Commitment	Low Involvement and High Commitment
BRAND IMAGE			
BRANDS RECALLED	Agros, Gresso, Mimosa, Nova Açores, Matinal	Mimosa, Matinal, Agros, Parmalat, Alpro Soja	Agros, Mimosa, Matinal, Alpro Soja, Nova Açores

BRAND IMAGE OF RECALLED BRANDS	"I think Agros is the oldest brand in the market, I know it since I am a child"; "Gresso hasn't any kind of advertising that I remember, I don't even know if it isn't associated to any other brand but it is more frequently on promotions"; "I remember Mimosa advertising and maybe the milks with extra calcium"; "I remember Nova Açores advertising about the cows and the pasture and the focus on Azores"; "I never tried Matinal but I associated it to elderly people but I don't know why"	"Mimosa focuses on price and quality! It is the most advertised and known brand. I associate it not only to milk but also yoghurts"; "I think Agros is really old in the market, I remember the pasture but I think it is not consistent in terms of flavour, that is why I stopped buying it"; "I like Parmalat, I think it is a good brand. When it appeared in the market it was expensive and associated to more selective consumers"; "Matinal is a delicate brand, even because of the packaging with a white flavour, I like it"; "Alpro is an expensive brand, more selective"	"I think Agros is a reputed brand, the milk is good"; "I think Mimosa is a good brand but I don't appreciate the milk, it has too much fat"; "Matinal is a recognized brand in the market"; "I know Alpro is made from soy but I don't like the flavour"; "I think Nova Açores has a stronger flavour, more associated to Azores and pastures"
CONSUMERS' PROFILE			
LIFESTYLE	"I don't practice sports but I know that I should"	"I walk a lot but I don't practice sports"	"I can't practice sports because of my health so my doctor advised me to practice hidrogymnastics"
	Sedentary	Active	Sedentary
FOOD HABITS	"I am concerned about health because as we get older, we should be more careful about the type of products that we consume"	"I think I still have a lot to improve but I avoid fried food and sweets"	"I try to have health habits because of my cholesterol problems"
	Healthy	Healthy	Healthy (Cholesterol Problems)
PROJECTIVE TECHNIQUE			
Type of People (age, gender, lifestyle)	Mimosa - "younger people or parents for their children"; Agros - "I think that the age range is more embracing, it is for everyone"; Matinal - "maybe of older people because of the extra calcium"; Nova Açores - "maybe for those of appreciate more intense flavours"; Gresso - "for those who are more driven by price as it is more frequently on promotion"	Agros - "more conservative people maybe with 50 years old"; Parmalat - "Probably more active and selective consumers, with higher incomes"; Mimosa - "I think it is for the medium social classes, because it is "the milk of the people", for all ages even for children"; Matinal - "elderly people with better financial conditions and more selective taste"; Alpro - "it has a niche target, for selective consumers and vegetarians with higher incomes"	Agros - "I believe that everyone could buy it, from all ages"; Mimosa - "Maybe adults with 30 years old"; Matinal - "Older people with cholesterol problems and higher incomes"; Nova Açores - "consumers from medium social classes who are driven by prices since this brand is frequently on promotion"; Alpro - "It is mainly consumed by vegetarian people from all ages"

Appendix 10 – Internet-based Questionnaire (held in Portuguese)

Welcome!
Within the scope of my master thesis at the NOVA School of Business and Economics, I am conducting a research related to the consumption of packaged milk in Portugal and the role of brands in consumers' purchase decisions.
Therefore, this questionnaire may take about 5 minutes and all the answers remain anonymous.
Thank you very much for your time!

Q1. Are you Portuguese or have you lived in Portugal in the last 5 years?
- ❍ Yes
- ❍ No

Condition: No Is Selected. Skip To: End of Survey

Q2. Are you over 18 years old?
- ❍ Yes
- ❍ No

Condition: No Is Selected. Skip To: End of Survey

Q3. Do you purchase or drink milk, at least, once a month?
- ❍ Yes
- ❍ No

Condition: No Is Selected. Skip To: End of Survey

Q4. Considering the milk category, which brands do you recall, at least by name?

Q5. From the list below, which brands do you know, at least by name?

❑ Mimosa	❑ Vigor	❑ Matinal
❑ Agros	❑ Auchan	❑ Terra Nostra
❑ Gresso	❑ Milbona	❑ Vive Soy
❑ Continente	❑ Alpro	❑ Ucal
❑ Pingo Doce	❑ Nova Açores	❑ Parmalat

Q6. From the list below, which brands does your household purchase or drink?

❑ Mimosa	❑ Vigor	❑ Matinal
❑ Agros	❑ Auchan	❑ Terra Nostra
❑ Gresso	❑ Milbona	❑ Vive Soy
❑ Continente	❑ Alpro	❑ Ucal
❑ Pingo Doce	❑ Nova Açores	❑ Parmalat

Q7. Which type of milk does your household purchase or drink?

- ❑ Skimmed Milk
- ❑ Semi-skimmed Milk
- ❑ Full Milk
- ❑ Flavoured Milk (chocolate, strawberry, vanilla, etc)
- ❑ Lactose-free Milk
- ❑ Added fibre, calcium and omega 3 Milk
- ❑ Vegetable Milk (soy, almond, rice, coconut, etc)
- ❑ Milk for children (powder or for growth)

Q8. How often do you drink milk?

- ❍ Every day
- ❍ 4 to 6 times a week
- ❍ 1 to 3 times a week
- ❍ Once every two weeks
- ❍ Once a month

Q9. At which meals/ times of the day do you usually drink milk?

- ❑ Breakfast
- ❑ Morning Snack
- ❑ Afternoon Snack
- ❑ Supper

Q10.From the list below, which words do you associate with milk or with the milk category?

- ❑ Healthy
- ❑ Natural
- ❑ Habit
- ❑ Azores
- ❑ Calcium
- ❑ Milk Products
- ❑ Breakfast
- ❑ Cows
- ❑ White
- ❑ Coffee
- ❑ Bones
- ❑ Family

Q11. On a scale of 1 (not relevant at all) to 7 (extremely relevant), what do you consider to be the influence of these factors on your decision-making when purchasing milk?

	1	2	3	4	5	6	7
Family's Opinions	❍	❍	❍	❍	❍	❍	❍
Friends' Opinions	❍	❍	❍	❍	❍	❍	❍
Specialists' recommendations (such as doctors and nutritionists)	❍	❍	❍	❍	❍	❍	❍
Advertising	❍	❍	❍	❍	❍	❍	❍
Media and Word-of-Mouth	❍	❍	❍	❍	❍	❍	❍
Promotional Campaigns	❍	❍	❍	❍	❍	❍	❍
Social Media	❍	❍	❍	❍	❍	❍	❍

Q12. Which characteristics do you look for when purchasing milk?

❑ Price
❑ Flavour
❑ Nutritional Composition
❑ Brand Reputation
❑ Brand Nationality
❑ Packaging
❑ In-store availability
❑ Innovation
❑ Quality

Q13. Rank, by order of importance, the information and media channels that you use when purchasing milk.

_____ TV and radio commercials
_____ Supermarkets' promotional flyers and magazines
_____ Outdoors and muppies
_____ Newspapers and magazines
_____ Products' labels
_____ Publications and news on social media

Q14. On a scale of 1 (strongly disagree) to 5 (strongly agree), how would you classify the following sentences?

	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
I only purchase milk from brands that I know.	❍	❍	❍	❍	❍
I only purchase milk from brands with strong, favourable and unique associations.	❍	❍	❍	❍	❍
Expensive milks have more quality.	❍	❍	❍	❍	❍
Unbranded milks have less quality.	❍	❍	❍	❍	❍
I would never drink milk from private labels.	❍	❍	❍	❍	❍
I always buy and consume the same milk brand by habit and routine.	❍	❍	❍	❍	❍
As long as I like the flavour, the brand is irrelevant to me.	❍	❍	❍	❍	❍
I am willing to pay more for the brand that I am used to	❍	❍	❍	❍	❍
I regularly analyse and compare the milk brands available in the market.	❍	❍	❍	❍	❍
I would hardly change the brand that I am used to purchasing.	❍	❍	❍	❍	❍
Milk brands look all the same; therefore, the brand is irrelevant for me.	❍	❍	❍	❍	❍
I decide the brand I am going to buy after a deep search and analysis	❍	❍	❍	❍	❍
After trying and liking one milk brand, I stop trying the other brands and I buy it by habit without even thinking	❍	❍	❍	❍	❍
I always buy the milk brand that is on promotion.	❍	❍	❍	❍	❍
I am aware of the different products of each brand.	❍	❍	❍	❍	❍
When purchasing milk, my decision is mainly functional.	❍	❍	❍	❍	❍

Alternatives to animal milk are healthier but too expensive.	❍	❍	❍	❍	❍
Vegetable milk is for vegetarians and lactose-intolerant people.	❍	❍	❍	❍	❍

Q15. From 0 to 100, how would you classify your brand commitment and your milk category involvement?

______ Brand Commitment

______ Milk Category Involvement

Q16. Which brand do you think stands out for each of the parameters?

	Mimosa	Agros	Gresso	Vigor	Alpro	Nova Açores	Matinal	Terra Nostra
The most recognized and reputed brand in the market	❍	❍	❍	❍	❍	❍	❍	❍
The most purchased in Portugal	❍	❍	❍	❍	❍	❍	❍	❍
The one with the most quality and better flavour	❍	❍	❍	❍	❍	❍	❍	❍
The best value for money	❍	❍	❍	❍	❍	❍	❍	❍
The most innovative	❍	❍	❍	❍	❍	❍	❍	❍
Most variety of products	❍	❍	❍	❍	❍	❍	❍	❍
Most original and distinctive packaging	❍	❍	❍	❍	❍	❍	❍	❍
The healthier and with better nutritional composition	❍	❍	❍	❍	❍	❍	❍	❍
The most original and distinctive advertising	❍	❍	❍	❍	❍	❍	❍	❍

Q17. If you could describe each brand in only one word, what would it be?
(If you do not know some of the brands mentioned, please write N.A.)

Mimosa ____________________ Alpro ____________________

Agros ____________________ Nova Açores ____________________

Gresso ____________________ Matinal ____________________

Vigor ____________________ Terra Nostra ____________________

Q18. Finally, how old are you?

- Between 18 and 24 y/o
- Between 25 and 34 y/o
- Between 35 and 44 y/o
- Between 45 and 54 y/o
- Between 55 and 64 y/o
- Over 65 y/o

Q19. What is your gender?

- Female
- Male

Q20. What is your level of education?

- Can't read / write
- Less than 4th grade
- 4th grade
- 6th grade
- 9th grade
- 11th /12th grades
- Professional or Arts Degree
- Incomplete undergrad
- Undergrad in Nursign, Social Services, Childcare, Primary Schooling, Tourism, Secretariat, Accounting, Archiving
- Other undergrad programs
- Post-grad or Masters
- PhD

Q21. What is your occupation?

- GO1 – Middle and Top Management
- GO2 – Specialized Technicians and Small Business Owners
- GO3 – Employees of Tertiary Sector
- GO4 – Qualified / Skilled Workers
- GO5 – Unqualified / Unskilled Workers
- GO6 – Retired / Unemployed
- GO7 – Students
- GO8 – Housewives

Appendix 11 – Interviewees' Profiles

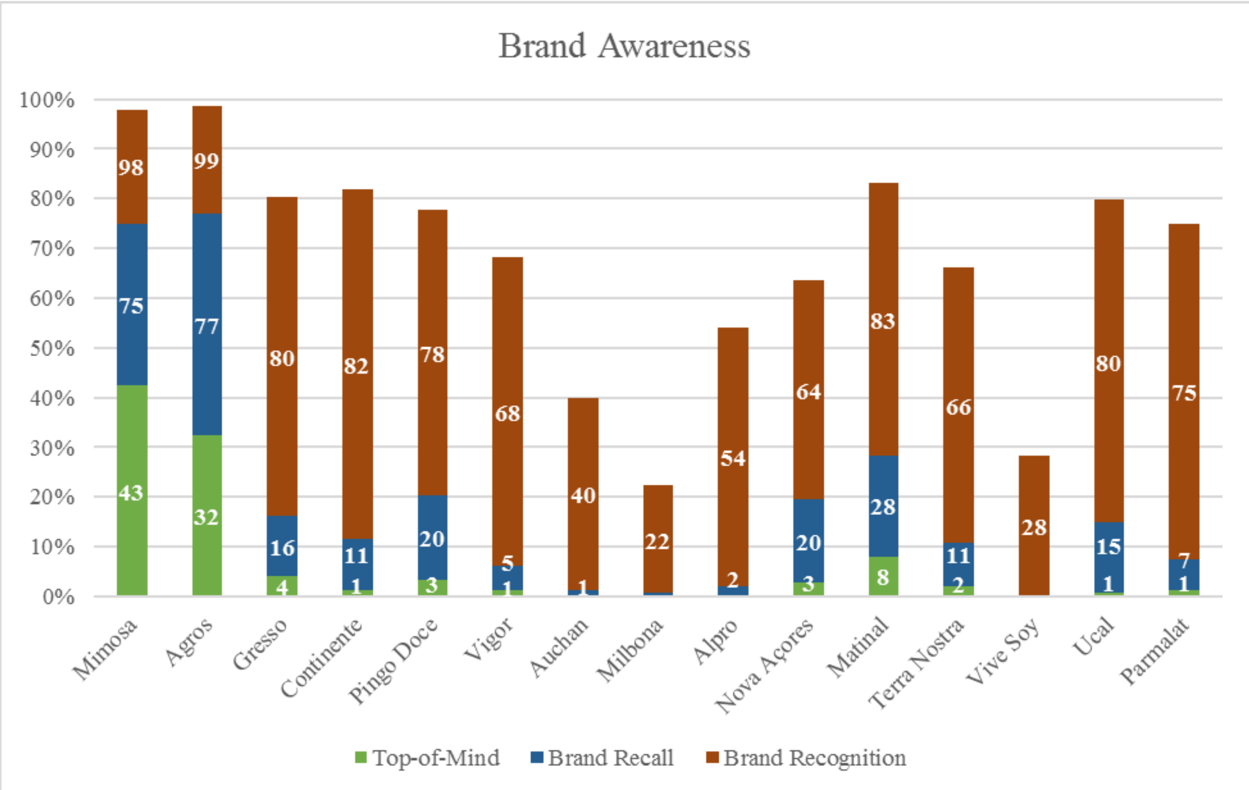
	GENDER	AGE	EDUCATION	OCCUPATION
Interviewee 1	Male	42 y.o. Range: Between 35 and 44 y/o	Post-grad or Masters	GO1
Interviewee 2	Female	79 y.o. Range: Over 65 y/o	Undergrad in Primary Schooling	GO6
Interviewee 3	Female	38 y.o. Range: Between 35 and 44 y/o	Undergrad in Tourism	GO6/GO7
Interviewee 4	Male	52 y.o. Range: Between 45 and 54 y/o	Other undergrad programs (law)	GO1
Interviewee 5	Female	22 y.o. Range: Between 18 and 25 y/o	Masters	GO7
Interviewee 6	Male	67 y.o. Range: Over 65 y/o	PhD	GO6
Interviewee 7	Female	56 y.o. Range: Between 55 and 64 y/o	PhD	GO1
Interviewee 8	Female	52 y.o. Range: Between 45 and 54 y/o	Masters	GO1
Interviewee 9	Female	28 y.o. Range: Between 25 and 34 y/o	Other undergrad programs (law)	GO3
Interviewee 10	Male	39 y.o. Range: Between 35 and 44 y/o	11th / 12th grades	GO3
Interviewee 11	Female	27 y.o. Range: Between 25 and 34 y/o	11th / 12th grades	GO4
Interviewee 12	Female	63 y.o. Range: Between 55 and 64 y/o	6th grade	GO5

Appendix 12 – Questionnaire Respondents' Profiles

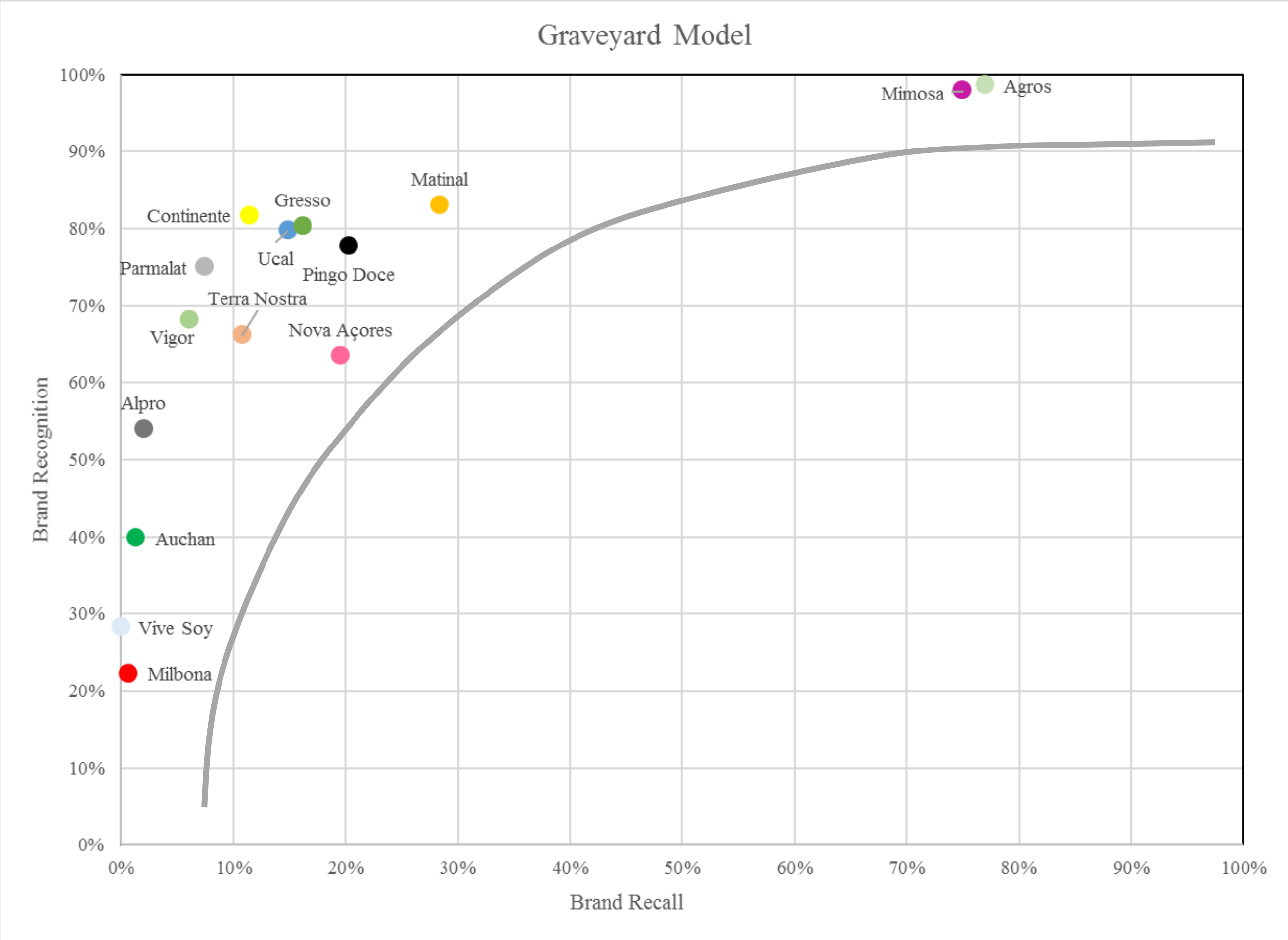
GENDER	**ABSOLUTE FREQUENCY**	**RELATIVE FREQUENCY**
Female	99	66,89%
Male	49	33,11%
	N = 148	100%
AGE	**ABSOLUTE FREQUENCY**	**RELATIVE FREQUENCY**
Between 18 and 24 y/o	41	27,70%
Between 25 and 34 y/o	30	20,27%
Between 35 and 44 y/o	19	12,84%
Between 45 and 54 y/o	36	24,32%
Between 55 and 64 years	15	10,14%
Over 65 years	7	4,73%
	N = 148	100%
EDUCATION	**ABSOLUTE FREQUENCY**	**RELATIVE FREQUENCY**
Can't read / write	1	0,68%
Less than 4th grade	0	0,00%
4th grade	6	4,05%

6th grade	3	2,03%
9th grade	8	5,41%
11th /12th grades	17	11,49%
Professional or Arts Degree	2	1,35%
Incomplete undergrad	14	9,46%
Undergrad in Nursing, Social Services, Childcare, Primary Schooling, Tourism, Secretariat, Accounting, Archiving	10	6,76%
Other undergrad programs	44	29,73%
Post-grad or Masters	42	28,38%
PhD	1	0,68%
	N = 148	100%
OCCUPATION	**ABSOLUTE FREQUENCY**	**RELATIVE FREQUENCY**
GO1 – Middle and Top Management	45	30,41%
GO2 – Specialized Technicians and Small Business Owners	6	4,05%
GO3 – Employees of Tertiary Sector	15	10,14%
GO4 – Qualified / Skilled Workers	28	18,92%
GO5 – Unqualified / Unskilled Workers	7	4,73%
GO6 – Retired / Unemployed	8	5,41%
GO7 – Students	37	25,00%
GO8 – Housewives	2	1,35%
	N = 148	100%

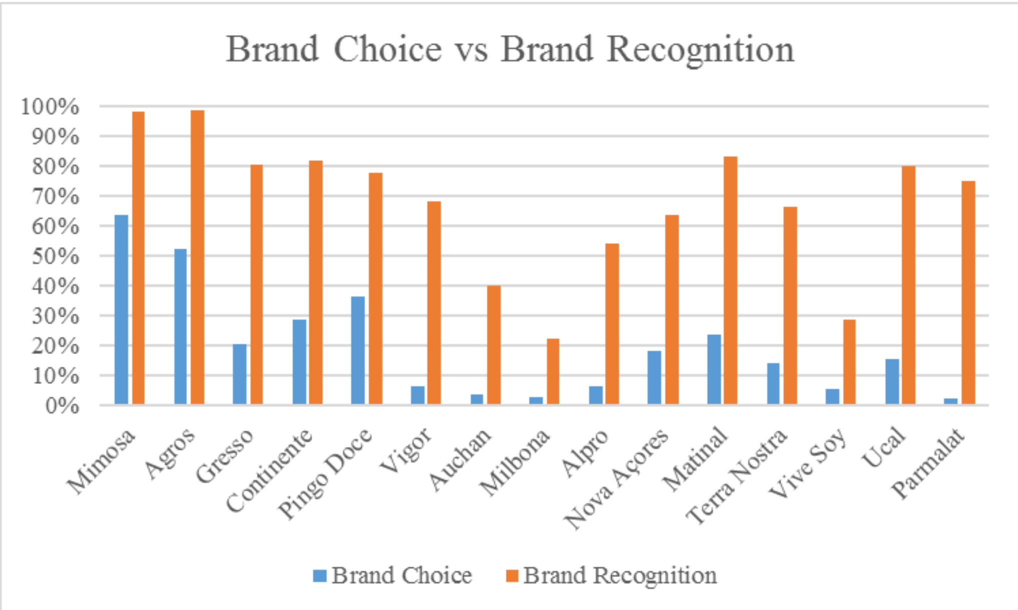
Appendix 13 - Brand Awareness in the Milk Industry



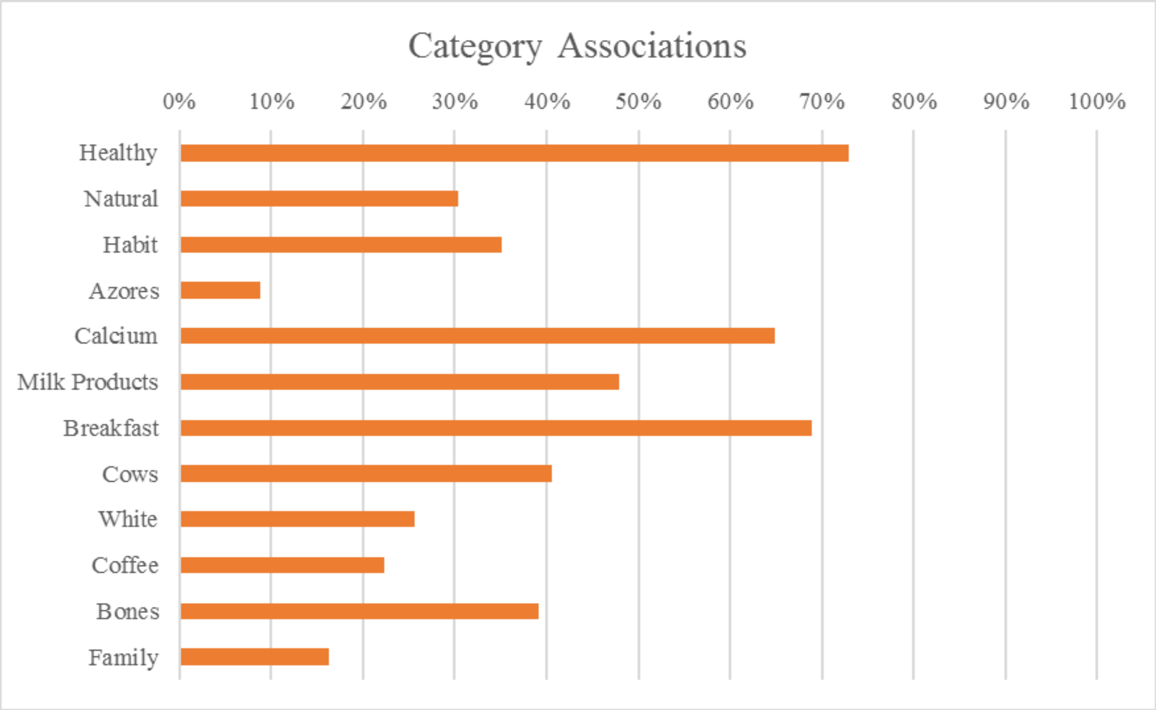
Appendix 14 – The Graveyard Model applied to the Milk Industry



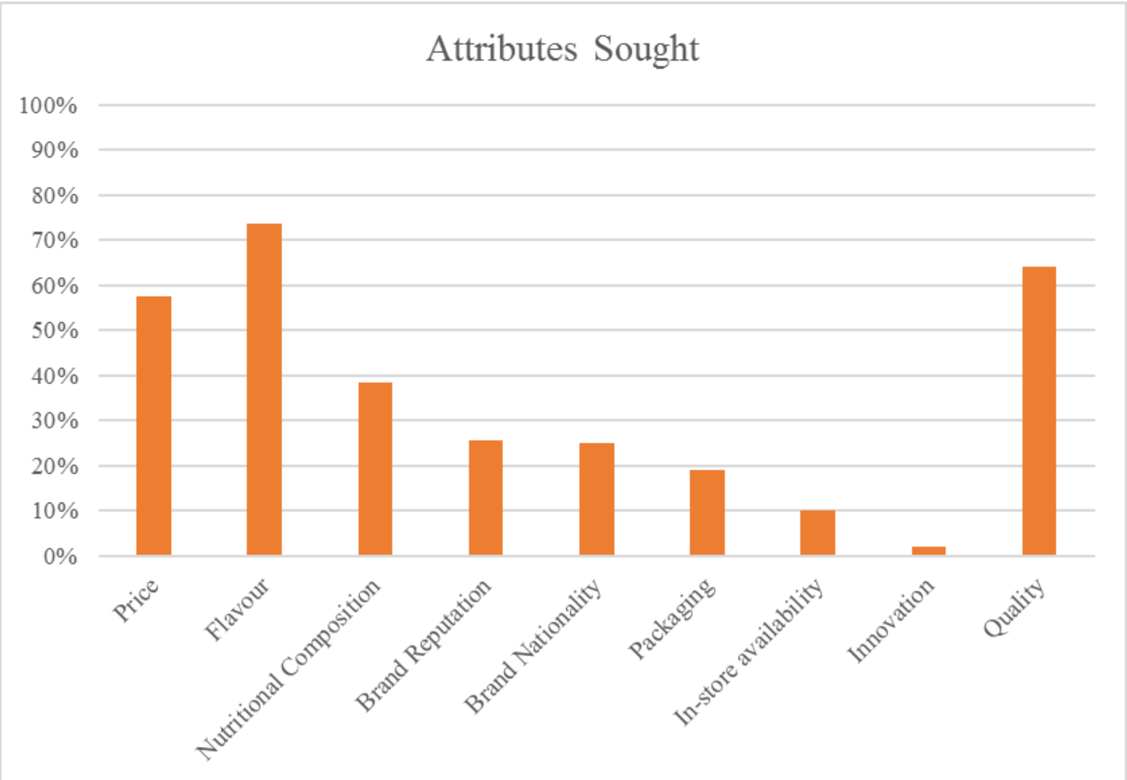
Appendix 15 – Brand Choice vs Brand Recognition of Milk Brands



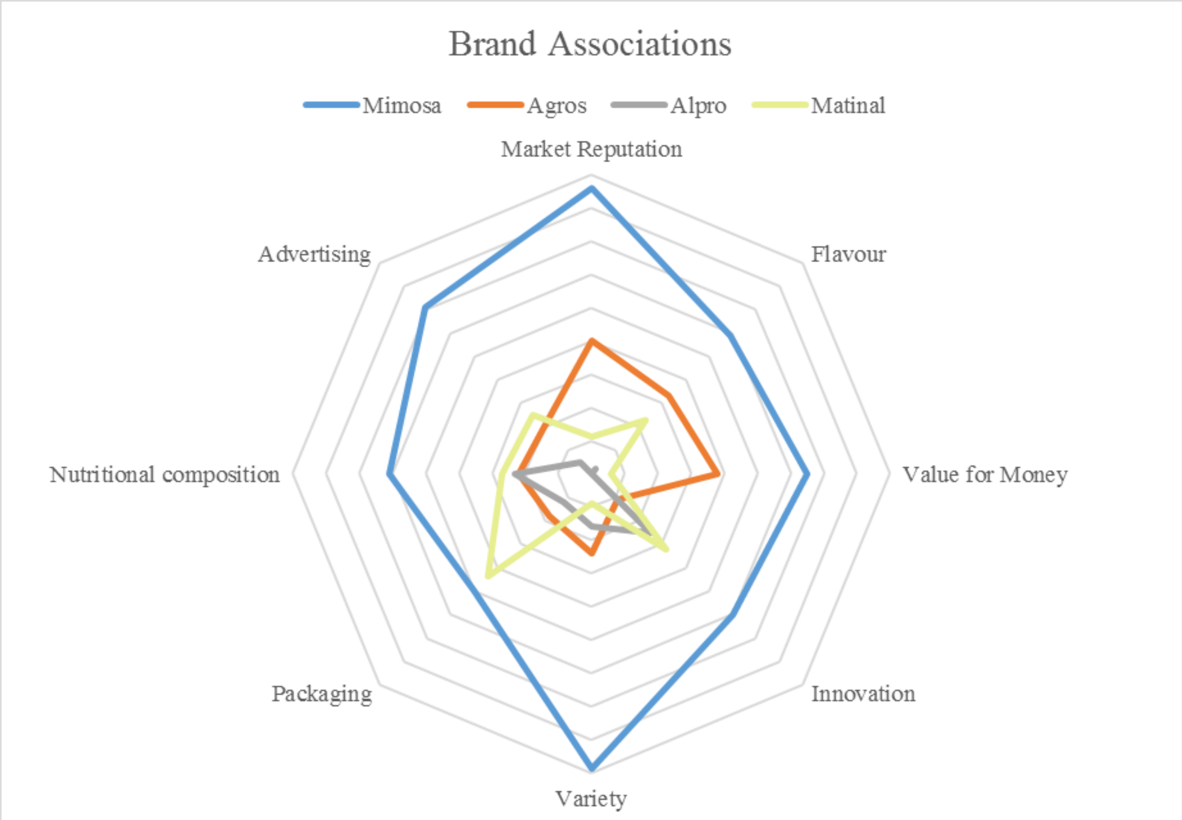
Appendix 16 – Milk Category's Associations



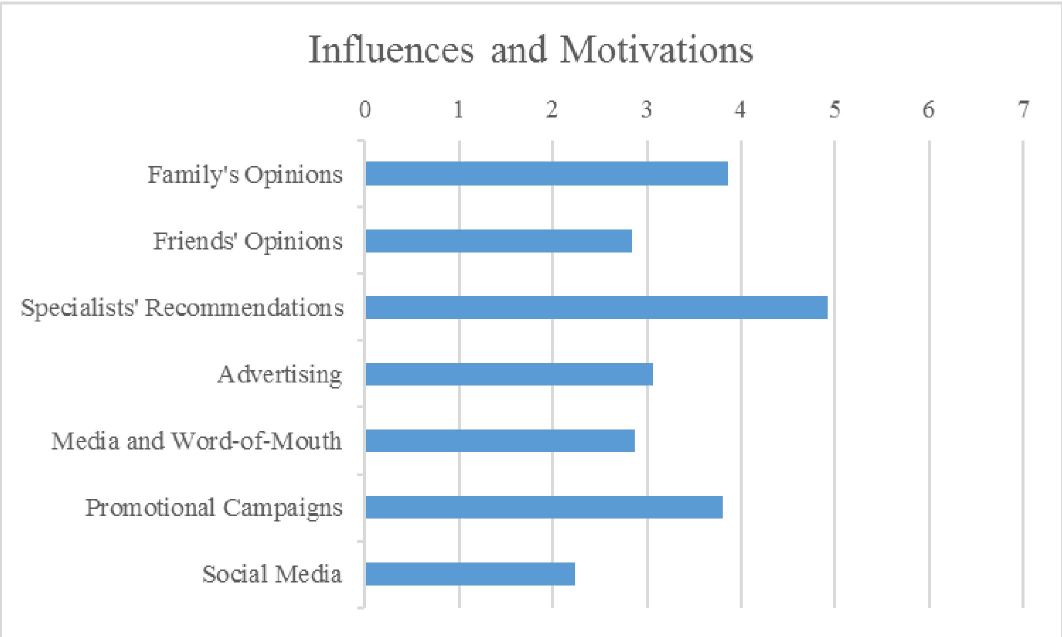
Appendix 17 - Attributes Sought in the Milk Category



Appendix 18 – Brand Associations for Mimosa, Agros, Alpro and Matinal



Appendix 19 – Consumers' Influences and Motivations when purchasing milk



Appendix 20 - Most valued and used Information Channels in the Milk Industry

	1st choice		2nd choice		3rd choice		4th choice		5th choice		6th choice		Total
TV and radio commercials	45	30%	32	22%	32	22%	26	18%	10	7%	3	2%	148
Supermarkets' promotional flyers and magazines	41	28%	43	29%	28	19%	19	13%	7	5%	10	7%	148
Outdoors and mupis	2	1%	5	3%	30	20%	31	21%	55	37%	25	17%	148
Newspapers and magazines	16	11%	19	13%	20	14%	39	26%	33	22%	21	14%	148
Products' labels	41	28%	36	24%	19	13%	15	10%	25	17%	12	8%	148
Publications and news on social media	3	2%	13	9%	19	13%	18	12%	18	12%	77	52%	148
Total	148	100%	148	100%	148	100%	148	100%	148	100%	148	100%	

Appendix 21 – The New Consumer Decision Journey applied to the consumers in the Loyalty Loop

Appendix 22 – The New Consumer Decision Journey applied to the consumers out of the Loyalty Loop

Appendix 23 – Brand Management Strategies for Milk Brands

"Traditional" Models of Consumer Behaviour	New Consumer Decision Journey	Brand Management Strategy	Brands in the Milk Sector
Stages	**Stages**	**Objectives**	**Examples**
Cognitive ↓ Affective ↓ Behavioural	Consider ↓ Evaluate ↓ Purchase ↓ Post-Purchase	Brand Awareness ↓ Brand Image ↓ Brand Interest	Alpro and Vive Soy Parmalat, Terra Nostra and Vigor
		↓ Brand Preference ↓ Brand Purchase	Gresso and Matinal
		↓ Brand Loyalty	Mimosa and Agros

Source: Da Silveira, Catherine. 2016. "Brand Management Course Slides", NOVA SBE Master in Management