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THE FACTORS THAT INFLUENCE THE DECISION OF PORTUGUESE BUYERS REGARDING WHICH BRAND OF MILK (NATIONAL BRAND OR PRIVATE LABEL) TO BUY IN SUPER AND HYPERMARKETS

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THE FACTORS THAT INFLUENCE THE DECISION OF PORTUGUESE BUYERS REGARDING WHICH BRAND OF MILK (NATIONAL BRAND OR PRIVATE LABEL) TO BUY IN SUPER AND HYPERMARKETS IN CONCELHO DE SETUBAL

Abstract:

The present study intends to identify what are the factors that influence the decision of Portuguese milk buyers in Concelho de Setubal regarding which brand of milk – national or private label – to buy. Based on qualitative and quantitative research, it can be concluded that there are two segments of milk buyers according to the brand of milk bought. These two segments belong to different age and income level groups, have opposite perceptions of private labels and of differentiation of milk products, present different levels of brand equity and brand loyalty and exhibit different sensitiveness to price and value (price-quality ratio).

Keywords: National Brand; Private Label; Milk; Setubal

Literature Review, Research Question and Hypotheses:

Worldwide, the overall market share of private labels grew from 2007 and 2009, after which it experienced a slightly decrease. *(Euromonitor International, 2014)*

Despite of being known *(Nielsen, 2014)* that private labels are more successful in commodity-driven, high-purchase categories and those in which the perception of differentiation is small, the categories where private label market shares are larger vary significantly across countries. Even within the European market, the performance of private labels varies across different product categories. In fact, Noormann and Tillmanns *(2016)* stated that the product category is more important to determine a private label success than the consumer characteristics.

Milk was considered the worldwide category where private labels are most successful (measured in sales value), especially in developed markets, where it represented more than 40% of the total sales in each developed country *(Nielsen, 2014)*. As such, milk was the product category selected to conduct the following research. The goal of this study is to identify the factors that influence the decision of Portuguese buyers regarding which brand of milk (national brand or private label) to buy in super and hypermarkets (Pingo Doce, Continente, Intermarché and Jumbo).

According to a Nielsen study *(2017)* on the milk market in Portugal from the first 32 weeks of 2016 and the first 32 weeks of 2017, the total value of milk was relatively stable around 24 million euros (Fig.A-1), as well as the percentage of value assigned to private labels and national brands (Fig.A-2, A-3), with private label brands representing 25% of the total value of the category in 2017. Regarding the different types of milk in the market, the distribution of value by type in 2016 and 2017 was similar, with UHT milk being the most valuable variety (Fig.A-4), accounting for more than 70% of the total milk value. Following the leadership of UHT milk, milk with flavour represented 17% of this product category, soy-milk accounted for almost 9% of the total value of milk and pasteurized and other milks represented 3% of the milk market value in 2017 (Table A-1). In addition, national brands had a stronger presence than private labels in all milk varieties (Fig.A- 5, A-6). Nevertheless, private labels value was mostly generated from UHT (76%) and soy milk (14%) – Fig.A-7, Fig.A-8.

Based on Brochado et al. (2015) and Nielsen (2014), there are six main variables that explain why many Portuguese consumers choose private label milk products instead of national brand milk products: the perception of differentiation between national brands and private brands' milk products, the brand equity and brand loyalty within the milk products' category, the price consciousness and value consciousness of consumers regarding milk purchases, as well as the overall perception of private labels.

Since milk products have minimal perceived differentiation - this is, the "perceived differences among milk products are low" *(Nielsen, 2014)* - and milk is the most successful private label category *(Nielsen, 2014)*, it is expected that the buyer's perception of differentiation of milk products influences the buying decision of which brand of milk (national brand or private label) to buy (H_1). Moreover, it is expected that consumers that have a low perception of differentiation of the milk products buy private label milk and that those that have a high perception of differentiation of milk products buy national label milk.

Additionally, the Nielsen Survey *(2014)* referred the low brand equity within the milk products category as a reason to justify the success of private levels in this category. According to Kotler & Keller *(2012),* brand equity is "the added value endowed on products and services" that "may be reflected in the way consumers think, feel and act with respect to the brand, as well as in the prices, market share, and profitability the brand commands". It is expected that the level of brand equity of milk products influences the buyers milk brand choice (H_2): the choice of private label milk is expected to be associated with a low level of brand equity of milk products, while the choice of national brand milk is expected to be associated with a high level of brand equity of milk products. Brochado et al. *(2015)* defended that brand loyalty is related with the buyers' proneness to buy private label products and Burton et al. *(1998)* verified that attitudes towards private labels and consumers' likelihood to present brand loyalty are negatively related. Brochado et al. *(2015)* defined brand loyalty as "the degree to which clients have positive attitudes towards brands, showing commitment and a desire to continue buying them in the future" and defended that consumers that present strong brand loyalty are less likely to switch between brands. It is expected that the level of brand loyalty of consumers in the milk product category influences the buyer decision regarding which brand of milk to buy (H_3). Moreover, as Nielsen *(2014)* stated that milk products present low loyalty to a brand and this is the category in which private labels are most successful, it is expected that buyers of private label milk present low loyalty to a brand and that buyers of national brand milks present high loyalty to a brand.

Another factor analysed by Brochado et al. *(2015)* was price consciousness, which is "the degree to which consumers focus exclusively on paying low prices". Brochado et al. *(2015)* verified that, for the yogurts' category, the higher the customer's sensitivity to price, the higher the likelihood of buying private label brands. Overall, consumers are extremely sensitive to price *(Nielsen, 2014)*. However, the degree of involvement with the products, the risk associated with the purchase and the purchase frequency are critical to determine the importance of this variable in each category *(Nielsen, 2014)*. In developed markets where private label milk products are the most successful, milk is considered a low involvement product. As such, the risk associated with purchasing milk is low and the purchase frequency is high, thus increasing the likelihood of consumers switching between brands (presenting low brand loyalty) and choosing the lowest priced-products *(Nielsen, 2014).* Additionally, the importance given to this product category is low *(Nielsen, 2014)*. Given this, it is expected that the buyers' level of price consciousness influences their milk brand decision (H_4), such that private label consumers are very price conscious whereas national brand consumers are not price conscious.

Brochado et al. *(2015)* also verified that value consciousness influences the customer's proneness to buy private label products, such that the higher the value consciousness of consumers, the more likely they are of buying private label brands. Value consciousness is the "concern for paying low prices subject to some quality constraints", the relation between perceived costs and perceived benefits. It is expected that the buyers' level of value consciousness of milk products influences their brand choice (H_5): it is expected that buyers with a high level of value conscious buy private label milk and that buyers with low value conscious buy national label milk.

In addition to the factors related to the product category, Brochado et al. *(2015)* verified that the overall perception of private labels also influences the buyers' proneness to buy private label products, such that the better the overall perception of private label brands, the more likely the buyer is to buy a private label product. As such, it is expected that the (overall) perception of private labels influences the buyers' choice of which brand of milk to buy (H_6), and that private label consumers have a positive perception of private labels whereas national brand consumers have a negative perception of private labels.

Methodology:

With the goal of validating the six hypotheses developed based on the literature, a qualitative and quantitative research was conducted. In a first stage of research, an expert in the milk product category and private labels manager of Auchan was interviewed. This interview lasted for one hour and took place in Auchan Lisbon Head Quarters. It was organized in four sections with different objectives: the first section aimed to collect information on the private label sector in Portugal, the second section on the milk market, the third one on the milk consumers profiles and the last section aimed to pre-validate the hypotheses developed based on the literature (interview guide available in app.B-1.1 and app.B-1.2). In a second stage of research, a questionnaire was developed with the main goal of understanding the consumers perceptions and attitudes towards milk and brand of milk bought (questionnaire guide available in App.B-2.1 and App.B-2.2). The respondents of this survey were people that had bought milk in super or hypermarkets in Concelho de Setubal, at least once, in the two months before the questionnaire was administrated. The sample selection was by convenience due to its simplicity and affordability (despite of its limitations in the inference). The fieldwork took place between September 21 and October 14 and in total, 274 people answered the questionnaire. However, 22 failed the filter questions, leading to a total of 252 valid answers (231 online and 21 offline). The questionnaire was organized in five sections: the first section concerned the general shopping behaviour, the second concerned milk buying behaviour and importance of general product attributes, the third section consisted in a group of sentences related to the variables to be tested, the fourth was about sociodemographic factors and the fifth section was related to the importance of general product attributes. In sections one and four, respondents were asked to select the most adequate option (multiple choice questions); in section 3, they were asked to select their level of agreement with each sentence using a five-points Likert scale; in section 2 they were required to answer multiple choice questions as well as select the level of importance of a group of variables (also using a five-points Likert scale); and in section 5 they had to rank variables according to their level of importance. Section 3 consisted in a group of twenty-five sentences which intended to measure the level of each of the variables from the hypotheses (e.g.: perceived differentiation). Each variable level was measured through a group of three to six sentences, adopted from Ailawadi et al.*(2001)* and Burton et al. *(1998)*. When measurement methods from previous research were not available or were inadequate to the purpose of this study, new sentences were developed based on the definition of the variables (as presented in "literature review"). For each sentence, the maximum and minimum values of the Likert scale had different meanings. For instance, a "1" in the first question corresponds to a high level of perceived differentiation whereas a "1" in the fifth sentence corresponds to a low level of brand equity. The link between variables and sentences, as well as the meaning of the agreement levels are presented in table 1.

Variables	Code	Sentences	High	Low	From
Perceived Differen-tiation (D)	D1	For me, there is no difference among the different brands of milk available in the market.	1	5	-
	D2	When I buy milk, I buy any brand.	1	5	
	D3	I usually do not spend a lot of time in the supermarket choosing among the different milk brands available.	1	5	
Brand equity (BE)	BE1	I believe unbranded milk products are as good as branded milk products.	1	5	-
	BE2	Buying milk of national brands makes me feel good.	5	1	
	BE3	The milk of one specific brand is better than the milk of all the other brands.	5	1	
	BE4	In the case of milk products, brands add a lot of value to the products.	5	1	
Brand loyalty (BL)	BL1	I have a favourite brand of milk.	5	1	Ailawadi et al. (2001)
	BL2	I only buy my favourite brand of milk.	5	1	-
	BL3	I worry a lot about the brand of milk I buy.	5	1	Ailawadi et al. (2001)
	BL4	I'm willing to make an effort to look for my favourite brand of milk.	5	1	
Price conscio-usness (PC)	PC1	Generally, I think the higher the price of a milk product, the higher its quality.	N/A		Burton et al. (1998)
	PC2	The money I save looking for low prices does not compensate for the time and effort spent.	1	5	

	PC3	I always choose the lowest-priced (per litres) milk in the store.	5	1	-
	PC4	I shop at more than one store to take advantage of low prices.	5	1	Burton et al. (1998)
Value conscio-usness (VC)	VC1	I normally look for products with low prices, but I only buy them if they meet my quality requirements.	5	1	Burton et al. (1998)
	VC2	When I shop milk, I compare prices of different brands to be sure I make the most of my money.	5	1	
	VC3	When I buy milk, I always try to maximise the quality obtained for the money spent.	5	1	
	VC4	I worry a lot about paying low prices, but I worry equally about product quality.	5	1	
Overall Perception of private labels (PPL)	PPL 1	In most product categories, the best purchase is always store brands/private labels.	5	1	Burton et al. (1998)
	PPL 2	Taking into consideration the importance of money, I prefer store brands to national brands.	5	1	
	PPL 3	Buying private labels makes me feel good.	5	1	
	PPL 4	When I buy private label products, I always feel like I'm getting a good deal.	5	1	
	PPL 5	Generally, private label products are low quality.	1	5	
	PPL 6	I feel happy when I find private labels available in the categories of products I usually buy.	5	1	

Table 1 – Section (3) of the questionnaire that measure the level of each respondent in the variables from the hypotheses and respective source. *Note: Answers to PC1 were not considered since this sentence meaning was considered inappropriate for the context of this study.*

To analyse the data, respondents were grouped according to their answer to question 2 of section 2 which asked the consumers if they had bought at least one milk of a private label in the previous three months. If the answer was positive, respondents were considered consumers of private labels; if the answer was negative, they were considered consumers of national labels. Having the data reorganized in two groups - Private label consumers and National label consumers – the analysis was always conducted for these two groups in parallel, with the goal of identifying significant differences among them. In some cases, the analysis for the aggregate level (total of respondents) was also conducted.

Respondent's answers to section 5 were only used for descriptive purposes as the question, by default, allows for a comparison of the most important factors for the two groups when choosing milk.

Respondents' answers to section 1 (buying behaviour), section 2 (milk buying behaviour, except question 2), and section 4 (sociodemographic) were analysed as follows: to describe the buying behaviour of both groups and infer if there were differences among private label and national label milk consumers, absolute and relative frequencies were computed; secondly, a Contingency Analysis was performed for each question. The contingency analysis (here and after CA) helps to analyse if there is a significant association between two categorical variables. With the goal of finding associations among the perception of differentiation, brand equity, brand loyalty, price consciousness, value consciousness, overall perception of private labels (here and after D, BE, BL, PC, VC, PPL) and the brand of milk consumed, section 3 was analysed through several CA. The null hypothesis (H_0) considered for each CA that was run is the independency between the two considered variables. The test statistics (Q) is computed comparing the observed frequencies with the expected ones, for the categories combination. If H_0 is true, $Q = \sum \frac{(O_i - E_i)^2}{E_i}$ is likely to follow: $X^2_{(n-1)*(c-1)}$ - a chi-square distribution with (n-c)x(c-1) degrees of freedom (or independent terms), in which n and c stand for the number of categories of each of the considered variables. A confidence level of 95% will be used for the decision, which means that for a p-value below 0,05, independency will be rejected, so we will believe that an association between the variables exists.

In order to prevent misrepresentation of some categories in a variable and to ensure consistency in the results, a category aggregation was conducted for all the variables before testing: each answer to a question was reorganized from five to three levels – example in tables B-1.1 and B1.2 - depending on the meaning of the extreme values for each specific variable (as explained in table 1). In addition, since each variable was measured by at least three sentences, a level aggregation was also performed, by summing the number of observations for each level (low, medium, high) of all the questions related to a variable.

Once the analysis of independency between these variables and the brand of milk consumed was completed, other CA were performed among D, BE, BL, PC, VC and PPL, as well as these variables and the significant sociodemographic variables (age and income per capita), in order to verify if there was any possible dependency among them.

After the preliminary selection of variables that seems to be associated with the brand of milk chosen, a Multiple Correspondence Analysis was run using XLStat Excel. A Multiple Correspondence Analysis (here and after MCA) is an exploratory statistical procedure that intends to infer if there are associations between classes of categorical variables (at least two variables). This analysis allows the categories visualization in a two-dimensional space that accounts for a proportion of the overall variability in the original variables. It is meaningful if the categories are well represented in the model and reflected in the two dimensions ('weight' and 'quality' in XLStat Excel, respectively).

Results and Discussion:

1. Qualitative research - Interview

In this section, the main insights from the interview with the expert in the private label sector are presented (transcript available in App.B-3)

Private label sector in Portugal: 1) Private labels are most successful in basic product categories such as rice, olive oil, sugar, salt and milk because in these product categories it is easier for the consumers to understand that there is no physical difference in the products of private labels and national brands; 2) Private labels are less successful in product categories that require larger transformation processes, such as cookies, cakes and "make ahead food", as well as cosmetics, due to differences in the recipes of national brands and private labels and to the emotional connections (high involvement product category) people have with this type of products; 3) Portugal is one of the European countries where private labels market share is highest, representing approximately 38% of the market; 4) In Portugal, private labels gained market share due to the value proposition/strategy of many distributers; and the economic crisis of 2008, with the strongest impact in the daily life of Portuguese people in 2010. These two factors led to the experimentation of private labels. As the levels of satisfaction with private labels was high, many Portuguese kept buying it. In fact, people associate buying private labels to "a smart/clever purchase"; 5) There was a huge growth of private labels sales since 2008, but nowadays, sales are considerably stable; 6) The huge discount level in Portugal represents a threat to the distribution business. In Portugal, consumers are used to buy products with a 50% discount. To be able to sell at such high discount levels and still be profitable, many retailers increase the "permanent price" of products. Most of the time, the price consumers pay is the same, but their perception is different. 8) Different retailers have different private labels strategies. On one hand, Pingo Doce and Lidl are private label driven: they intensify the availability of private labels by giving them strong positions in stores and reducing the offer of national brands. On another hand, Continente and Auchan have a "lighter" approach to private labels.

Milk market in Portugal: 1) Regulation is very important. There was a crisis concerning the price of milk (producers were selling milk below the production cost) and therefore, a regulation to guarantee a minimal selling price was created; 2) Also, price has an important role in the choice of milk. Since most consumers perceive that the differentiation between the standard milk of a national brand and of a private label is low, they buy the lowest-priced product at the purchase moment (which can be a national brand or a private label); 3) In terms of sales, Mimosa is the market leader in Portugal; 4) In terms of production, private label products meet the same quality standards than national brand products. The major difference between private label milks and national brand milks is marketing: whereas private labels do not reflect the marketing costs in their private label products (this cost is associated with the marketing of the distributor instead of with each product), national labels must reflect all marketing and communication costs in the price of the product; 5) Regarding consumption, milk has always been a product with high levels of consumption. However, two years ago, sales in the category started to decrease, mainly due to research that revealed that milk could be unhealthy. When this shift in consumption occurred, milk production kept the same, which led to an unbalanced of demand and offer, ultimately resulting in the decrease of milk price. In addition, consumption of standard milk alternatives, such as soy and rice drinks or lactose-free milk increased.

Milk Consumers Profile: 1) Although price is a very important factor in the choice of milk product, the level of income does not necessarily affect the choice of the consumer. This is, there are people with high income that only purchase private label milk and people with low income that only buy national brand milk; 2) Around 80% of the buyers at Auchan are females and housewives.

All the hypotheses seem to be validated by the interviewee.

2. Quantitative Analysis - Questionnaire

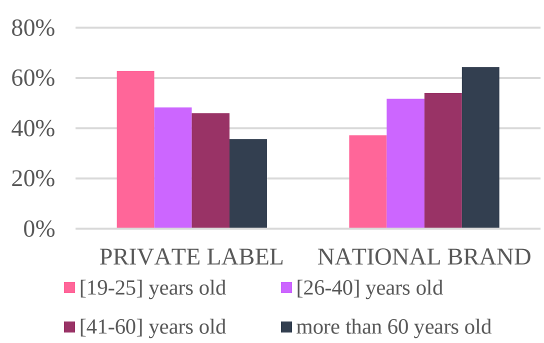
Sample Characterization: 252 respondents from both genders aged more than 18 years old, with and without food constraints, and responsible (or not) for children. 123 (49%) respondents are private label consumers and 129 (51%) are national label milk consumers

Regarding age, more than 75% of the sample (195) was among 26 and 60 years old, with the extreme age groups, below 25 years old and above 60 years, concentrating 17% (43) and 6% (14), respectively, of the sample (fig.C-1.1). In terms of age distribution according to the brand purchase, the age groups with most respondents (26 to 40 and 41 to 60 years old) have a similar amount for private label (47%;91) and national brand milk consumers (53%;104). The youngest group has more private label milk consumers (63%;27) than national brand milk consumers (37%;16) whereas the oldest group has more national brand milk consumers (64%;9) than private label milk consumers (36%;5) – Fig.C-1.2. Concerning gender, the sample is composed by 80% (204) females and 20% (48) males (Fig.C-2.1), equally distributed among type of brand consumed: approximately 50% (24 males; 99 females) consume private label milk and 50% (24 males;105 females) consume national brand milk (Fig.C-2.2). Most of the respondents shop for two (24%;60), three (32%;80) or four (31%;77) people, including themselves. The extreme groups do not concentrate many respondents: 8% (19) shop for more than four people and 6% (16) shop only for themselves (Fig.C-3.1). There are more respondents that shop for either themselves, two or three people consuming national brand milks (56%;88) than private label milks (44%;68) and more respondents that shop for at least four people consuming private label milks (57%;55) than national label milks (43%;41) - Fig.C-3.2. Moreover, 75% (188) of the respondents said that neither themselves, nor the people to whom they shop have a food constraint (75%;188) - Fig.C-4.1. 42% (27) of the respondents with food constraints consume private label milk and the others 58% (37) consume national brand milk, 51% (96) of the respondents without food constraints consume private label milk and 49% (92) consume national brand milk (Fig.C-4.2). Furthermore, 30% (79) of the respondents are responsible for at least one child (Fig.C-5.1). The split among type of brand consumed according to this variable is the same, with approximately 48% (38) of respondents with kids and 49% (85) without kids consuming private label milk (Fig.C-5.2). Concerning monthly income per capita, the largest groups are those with income per capita from 400€ to 600€ (27%;67) and 800€ to 1000€ (26%;62). Only 12 (6%) respondents have an income per capita below 200€ and 10 (35%) have an income per capita above 1000€ (Fig.C-6.1). In terms of distribution according to the type of brand consumed, the groups of income per capita until 600€ are composed for more private label milk consumers (59%;77) than national brand milk consumer (41%;52), whereas the groups of income per capita above 800€ are composed for more national brand milk consumers (67%;62) than private label milk consumers (33%;31) – Fig.C-6.2

Buying behaviour characterization: Regarding shopping frequency, most respondents go to the supermarket once a week (39%;98) or more than once a week (49%;101); 29 (12%) shop every two weeks, 11 (5%) shop with less frequency that this and 13 (5%) go to the supermarket everyday (Fig.C-7.1). In terms of distribution according to the type of brand consumed, all these categories are approximately evenly split (Fig.C-7.2). Most of the respondents shop with one or more people (54%;135) - usually, from their family (the sponsor (17%;42) or the sponsor and children (20%;50)). 117 respondents (46%) shop alone (Fig.C-8.1). Concerning the type of brand consumed, 50% of the respondents that shop with other people (135) consume private label milk and the others 50% consume national brand milk. 47% (55) of the respondents that shop alone consume private label milk and 53% (62) consume national brand milk (Fig.C-8.2). Finally, most respondents

(44%;111) buy one to two milk pallets (6 to 12 1 litre packages) in a regular month. 20% (51) buy less than one pallet and 36% (90) buy more than three pallets in a regular month (Fig.C-9.1). From those that buy less than two pallets in a regular month, 46% (74) consume private label milk and 54% (88) consume national label milk, and from those that buy more than two pallets in a regular month, 54% (49) consume private label milk and 46% (41) consume national label milk (Fig.C-9.2).

Associations between sociodemographic variables and the type of brand consumed: All the sociodemographic variables were divided according to the type of brand consumed by each respondent and afterwards, used to conduct several CA. For a typical p-value of 0,05, it seems to be a dependency relationship between age and type of brand consumed (p-value=$2{,}90\times10^{-2}$) – tables D-1.1 to D-1.3 - as well as monthly income per capita and type of brand consumed (p-value=$1{,}43\times10^{-5}$) – tables D-2.1 to D-2.3. All the other variables did not obtain a p-value lower than 0,05 and therefore, it cannot be said that there is a dependency relationship between them and the type of brand consumed (tables D-3.1 to D-6.3). Comparing the results of the observed frequencies table (tables D-1.1 and D-2.1) and expected frequencies tables (tables D-1.2 and D-2.2) and looking at Figures 1 and 2 above, it seems that younger people (until 25 years old) and people with lowest monthly income per capita (up to 800€ per capita) tend to buy private label milk, while older people (above 25 years old) and people with highest monthly income per capita (above 800€ per capita) tend to buy national label milk.



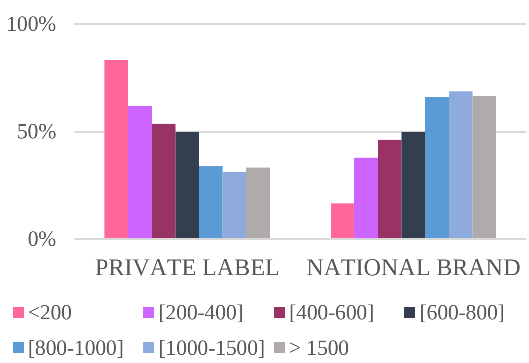


Figure 1 – Distribution of respondents according to type of brand consumed and age;

Figure 2 – Distribution of respondents according to type of brand consumed and monthly income per capita.

Associations between buying behaviour variables and the type of brand consumed: Several CA were conducted for each buying behaviour variable (shopping frequency, companionship, volume bought) and type of brand consumed but none of them seem to have a dependency relationship with the type of brand consumed–tables D-7.1 to D-9.3.

Associations between general product attributes and type of brand consumed: There were also performed several CA for the degrees of importance of general product attributes in the consumers milk brand choice and the type of milk brand consumed. For a 95% confidence level, from the importance of brand, flavour, price, price-quality ratio, discounts, ethic concerns, advertisement, product design and health concerns in the milk purchase decision, the first six (brand, flavour, price, price-quality ratio, discounts and ethics concerns) have a dependency relationship with the type of brand consumed – tables D-10.1 to D-18.3. This is, there is an association between the different levels of importance of these six variables and the type of brand consumed. As it can be inferred from figure 3, results suggest that consumers who consider price, price-quality ratio and discounts as very important, and brand, flavour and ethics as not very important tend to buy private label milk brands, whereas consumer who think that brand, flavour and ethics are very important, and price, price-quality ratio and discounts are not very important tend to buy national milk brands. This is consistent with the results from section 5 (Fig.D-1), which indicate that price quality ratio (85%), flavour (84%) and brand (71%) are the most important factors in the milk brand purchase decision of national brand consumers and that price (85%), price-quality ratio (81%) and flavour (77%) are the most important factors in the milk brand purchase decision of private label consumers.

Figure 3 – Distribution of respondents according to type of brand consumed and degree of importance of the significant product attributes.

Associations between variables from the hypotheses and type of brand consumed: All the initial hypotheses were validated from the data. D, BE, BL, PC, VC and PPL have a dependency relationship with the type of brand consumed. The distribution of consumers according to the type of brand consumed and these variables can be observed in Figure 4. Concerning perceived differentiation of milk products, the CA of this variable and the type of brand consumed scored $2{,}77\text{x}10^{-15}$, leading to the conclusion that the two variables are associated. Additionally, the data suggests that those who have a low (or medium) perception of differentiation of milk products tend to buy private label milk and that those who have a high perception of differentiation of the milk products tend to buy national brand milk (tables D-19.1 to D-19.3). Similarly, the CA of brand equity and type of brand consumed scored $1{,}89\text{x}10^{-14}$, suggesting that there is a dependency relationship between the two variables. It seems that consumers that say that the brand equity in the milk category is low, buy private label milk and that consumers that say the brand equity within the category is high (or medium), buy national brand milk (tables D-20.1 to D-20.3). The CA between brand loyalty within the product category and type of brand consumed scored $6{,}07\text{x}10^{-10}$, indicating that these two variables are also associated. The data suggests that consumers who exhibit low loyalty to a milk brand, consume private label milk whereas consumers that exhibit high (or medium) loyalty to a milk brand, consume national brand milk (tables D-21.1 to D-21.3). When it comes to price consciousness, the independency test scored $2,69 \times 10^{-9}$ and results suggest that those who are very price concerned ("high" price consciousness) tend to buy private label milk whereas those who are not very price concerned ("medium" and "low" price consciousness) tend to buy national brand milk (tables D-22.1 to D-22.3). Similarly, the CA for value consciousness and type of brand consumed scored $2,49 \times 10^{-7}$, indicating that there is an association among these two variables. Comparing the observed and expected frequencies, it seems that consumers with high (or medium) value consciousness tend to buy private label milk products whereas consumers with low value consciousness levels tend to buy national brand milk – tables D-23.1 to D-23.3. Lastly, the CA for overall perception of private label brands and type of brand consumed scored $2,61 \times 10^{-4}$. There is also a dependency relationship among these variables and the data suggests that those who have a positive perception of private labels tend to buy private label milk, whereas those who have negative (or neutral) perception of private labels tend to buy national brand milk – tables D-24.1 o D-24.3.

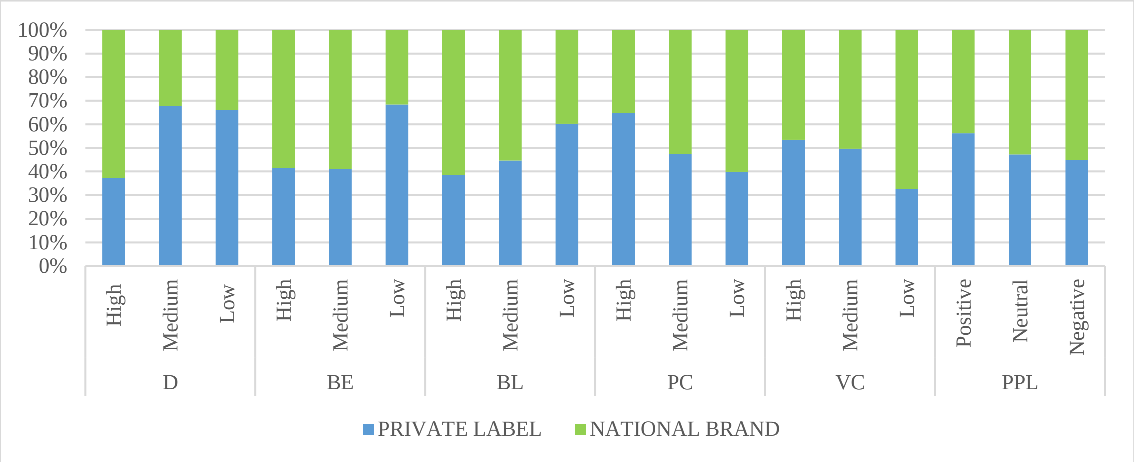
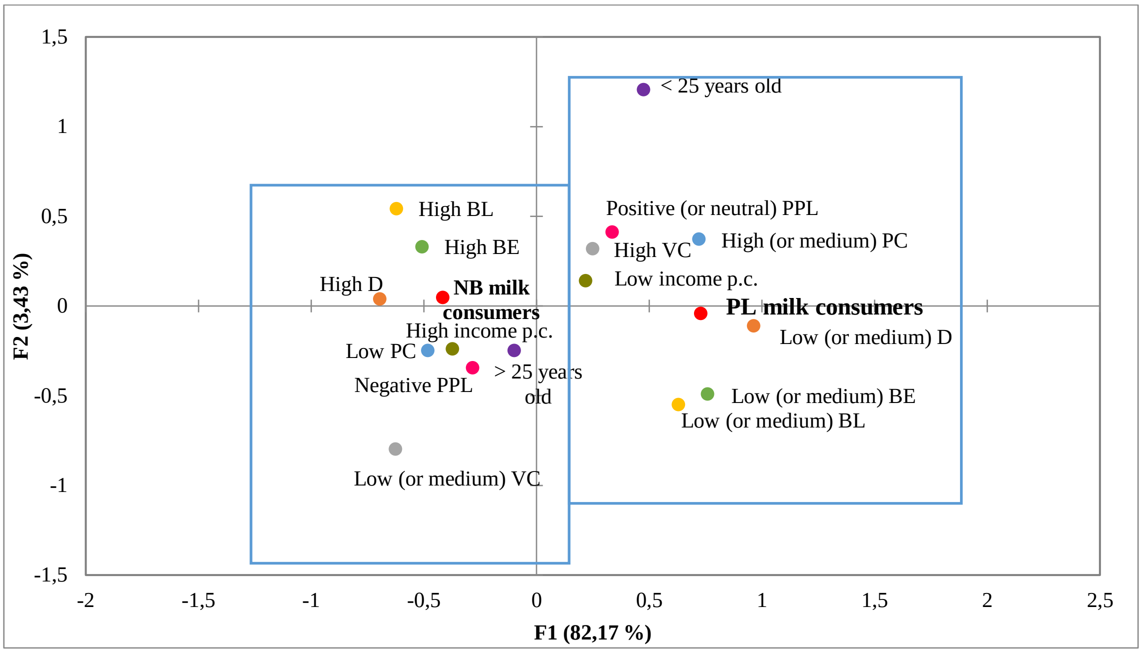


Figure 4 – Distribution of respondents according to type of brand consumed and levels of D, BE, BL, PC, VC, PPL.

Associations among the variables that have a dependency relationship with the type of brand consumed: To verify if there is any association among the variables of the hypotheses, as well as between these variables and age and income per capita, multiple CA were performed (tables D-25.1 to D-53.3). For example, it was performed an independency test for perceived differentiation and brand equity (tables D-25.1 to D-25.3) as well as for perceived differentiation and price consciousness (tables D-27.1 to D-27.3). Apart from the test of independency for brand equity and value consciousness and for brand equity and income per capita, the other independency tests scored values below 0,05, indicating that these variables are associated, which makes it harder to understand if they are all important to differentiate private label and national brand milk consumers or if only some of them are important and the others are just their effect. To overcome this possible dependency issue among the variables, a MCA was performed. Although the MCA is an exploratory technique absent of statistical testing, it transforms the initial dependent variables in independent ones, thus solving the dependency problem. Furthermore, statistical tests (CA) proving the relevance of the variables used in the MCA were already conducted.

Overview of the associations and discussion: All the variables that revealed to have a significant relationship with the type of brand consumed were considered to conduct a MCA with two dimensions (D1 and D2) which represent 85,60% of the variability in the initial data set (Graph 1) – refer to tables E-1.1 and E-1.2 for representativeness and quality. The visual representation of the distribution of the different classes of brand of milk consumed, perceived differentiation, brand equity, brand loyalty, price consciousness, value consciousness, perception of private label, age and income per capita suggests that different categories of the same variables are associate with the type of brand consumed. It can be observed that the classes of the variables associated with private label milk consumption (e.g. low brand equity and high price consciousness) are concentrated in the right side of the map, while the classes associated with the national brand milk consumption (e.g. high brand loyalty and negative perception of private labels) are concentrated in the left side of the map.



Graphic 1 – Visual Representation of the MCA with D, BE, BL, PC, VC, PPL, age, income per capita (p.c.) and type of brand consumed.

Therefore, it can be said that there are two different groups of milk consumers: the private label milk consumers and the national label milk consumers. The private label milk consumers are less than 25 years old, have a monthly income per capital up to 800€ and overall, like private label products. They do not perceive any difference between the brands of milk in the supermarket, they believe that within the milk category, brands do not add much value to the unbranded products, and they are not loyal to a specific brand. Furthermore, they are extremely concerned with buying the lowest priced milk as well as the one with the highest price-quality ratio. The national brand milk consumers are more than 25 years old, have more than 800€ per capita and overall, do not like private label products. They believe there are many differences between milk brands and that brands add much value to the milk products. They are very loyal to a specific brand. In addition, they are not very concerned with paying the lowest price for milk and with finding the best price-quality ratio milk product.

Limitations:

There are two main issues related with the definition of private label milk consumers used in the questionnaire: the first one is that the consumers of private label milk can be consumers of only private label milk and consumers of both private label and national brand milks; and the second one is about the quantity of private label milk bought used to be considered a private label milk consumer. For simplification reasons, no distinction was made among consumers that buy only private label milk, only national label milk or both. This could have impacted the results because consumers of both types are less likely to have strong positive or negative perceptions about milk brands, which could have led to a convergence of observations to the "medium" level, thus, masking the differences between private and national label milk consumers. However, this does not seem to have a significant impact in the data because the results were very distinct for the two groups of consumers. Moreover, due to the price and quantity discounts that retailers do, either consumers have a clear preference for a product or brand or they switch according to the promotion levels. Since consumers usually have a clear preference for a product or brand in the case of national brands, a division between only private label milk and consumers of both private label and national brand milks could have resulted in few consumers of only private label milk (which would require an aggregation of categories). Furthermore, the definition of private label milk consumer applied in this study only requires a person to have bought one single private label milk in three months. For instance, a person that always buys national label milk brands but bought one package of a private label milk in

September was considered a private label consumer. This indicates that the “real number” of private label consumers in the sample is lower than value presented (123) and that the difference in the “real number” of private label milk consumers and the number of private label milk consumers indicated in this study is the number of consumers wrongly classified. In fact, this limitation may explain why, according to the data, there are some private label consumers that do not behave as the rest of the group and vice versa. However, this does not seem to have happened for many respondents, since the results are very consistent, and it was possible to distinguish two different types of milk consumers. It can be concluded that the fact of the definition of private label consumers used and of the quantity considered to label a respondent as private label consumer had a low impact in the results and therefore are not huge limitations.

Another limitation of this study is that the statistical techniques applied only allow for a dependency association among variables and a visualization of its distribution. Additionally, the MCA is an exploratory technique which lacks statistical testing. In the case of the CA we can only conclude that there is (or not) a significant relationship of dependency between the two variables – the association of high and low levels with the brand consumed are just suggestions based on the distribution of the data but are not statistically supported. In addition, there is no causality in this study: it is only possible to say that it seems that private label consumers do not perceive many differences among the different milk products; it is not possible to say that if a milk consumer buys a private label consumer, he/she does not perceive many differences among the different milks.

Furthermore, despite of the efforts to have the most possible diversified sample, the data collection was mainly done through the internet, specifically, social media channels and email interception, which automatically excludes a huge percentage of the elderly population of Setubal. Moreover, at some extent, the respondents were people within the researcher's group of contacts which does not necessarily constitute a group representative of the entire Setubal population. Additionally, the data is based on what the respondents' say they do and think when buying milk and not in their behaviour. Even dough the data was collected using a written and anonymous questionnaire it is still a reflection of what consumers say they do and there is no guarantee that they are not lying. To mitigate this problem (as well as to ensure consistency in the results) the questionnaire included more than one question related to each variable.

Finally, this study was conducted in Setubal and results cannot be extrapolated to the entire country. Similarly, it only considers people perceptions in the milk category and should not be generalized to other product categories.

Directions for Future Research:

To develop a complete understanding of the milk market in Portugal, future research should be applied across the entire country, including all distribution channels in which milk brands are sold (e.g. discounters such as Lidl and Mini Preço) and measure both consumers perception and behaviour. Once a sample representative of the Portuguese population is build, it would be interesting to apply a similar questionnaire/conduct a similar study in other low involvement product categories (such as sugar, rice or pasta) to the same respondents, to analyse if the results obtained across low involvement product categories are consistent and therefore can be generalized for the entire low involvement product categories.

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<u>Appendices</u>

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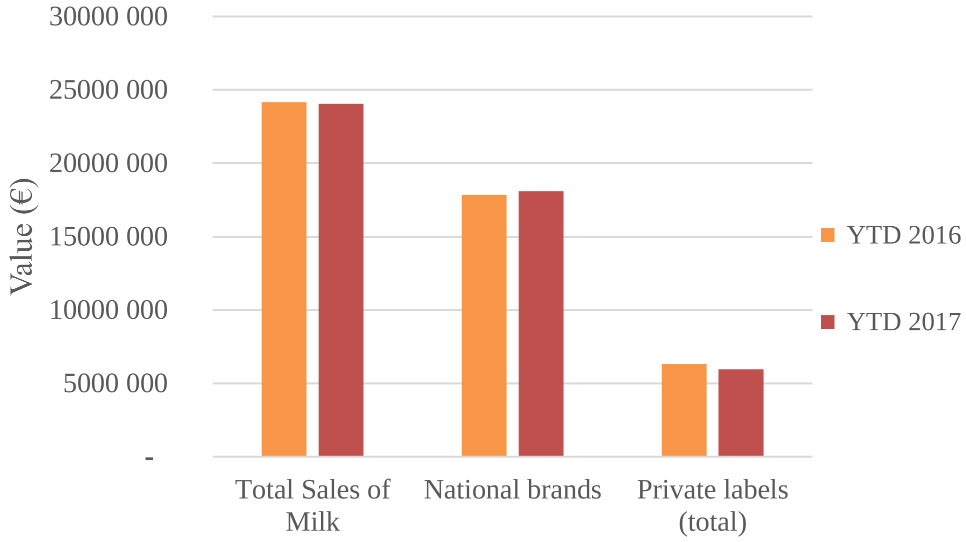
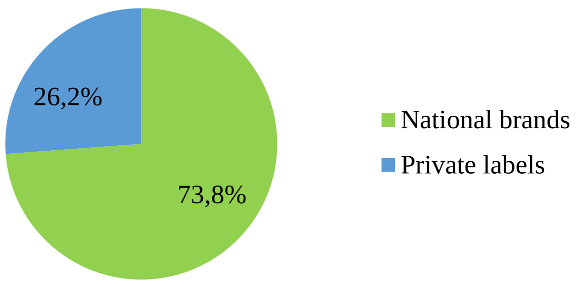
Appendix A – Milk Market Characterization

Figure 1- Milk: total value - breakdown by brand, YTD 2016, 2017



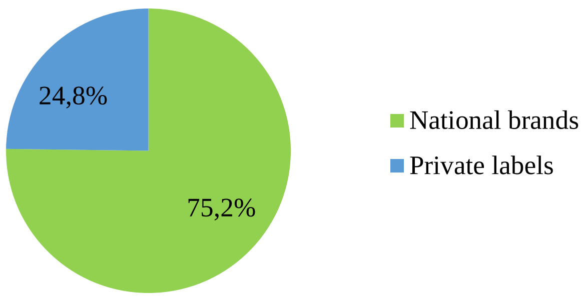
Source: Nielsen, 2017 - Private labels report W32

Figure 2 - Milk: total value (%) - breakdown by brand (Private labels Vs National brands), YTD 2016



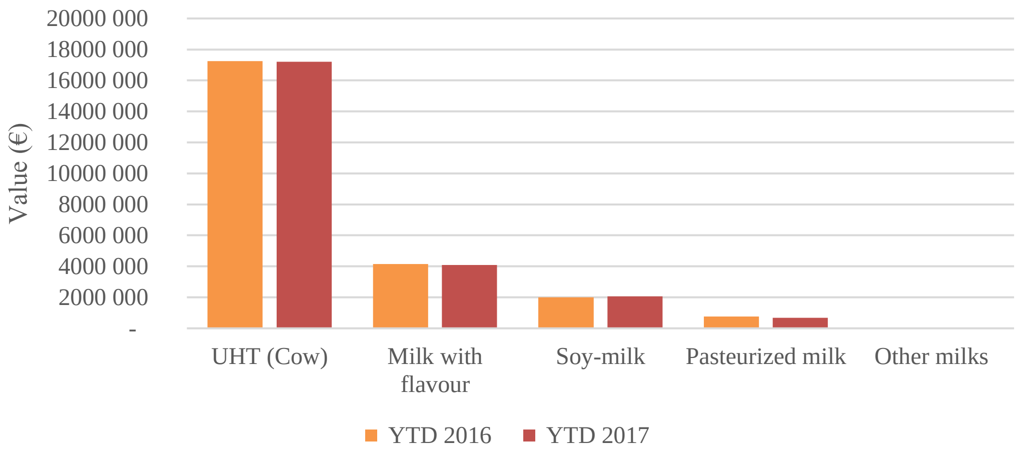
Source: Nielsen, 2017 - Private labels report W32

Figure 3 - Milk: total value (%) - breakdown by brand (Private labels Vs National brands), YTD 2017



Source: Nielsen, 2017 - Private labels report W32

Figure 4 – Milk: total value - breakdown by type segments, YTD 2016, 2017



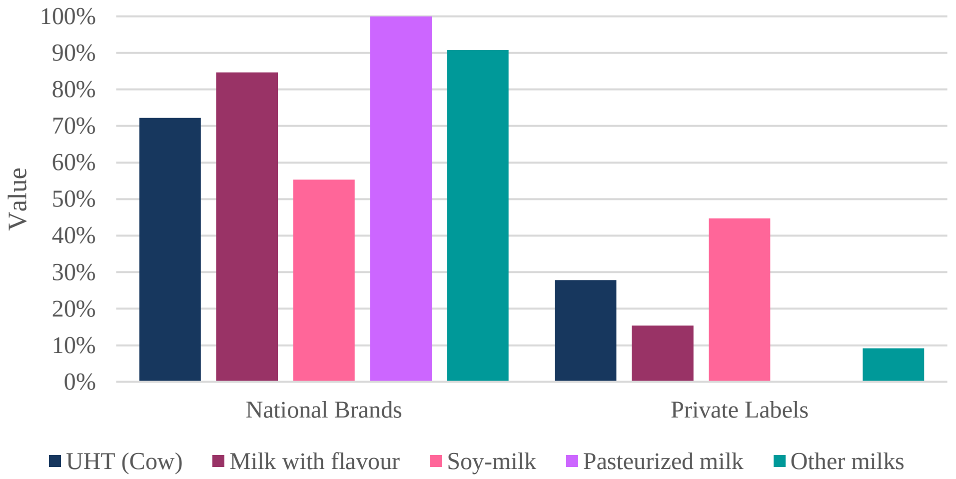
Source: Nielsen, 2017 - Private labels report W32

Table 1 - Milk: total value (%) - breakdown by type segments, YTD 2016, 2017

Milk by type	YTD 2016	YTD 2017
UHT (Cow)	71,4%	71,5%
Milk with flavour	17,2%	17,0%
Soy-milk	8,3%	8,6%
Pasteurized and other milks	3,2%	2,8%
Total	100%	100%

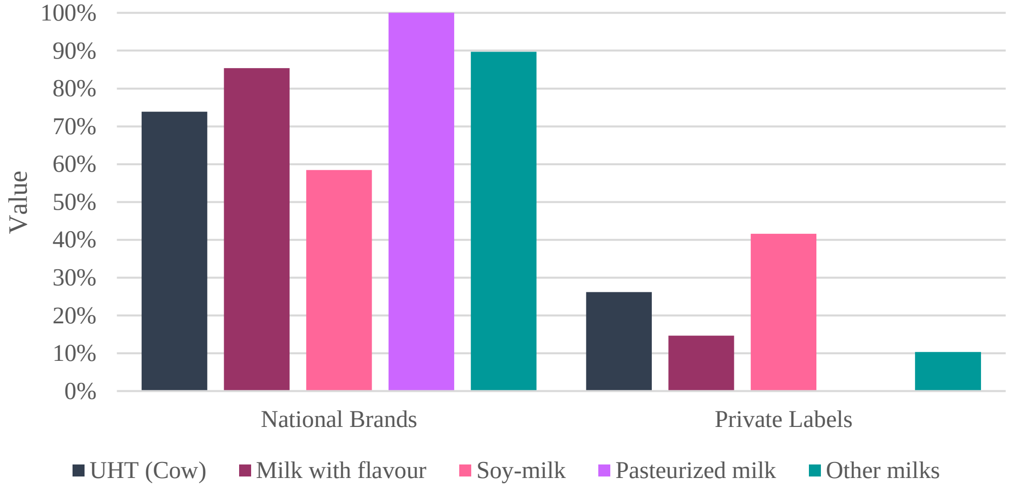
Source: Nielsen, 2017 - Private labels report W32

Figure 5 - Milk: value by brand (%) - breakdown by type, YTD 2016



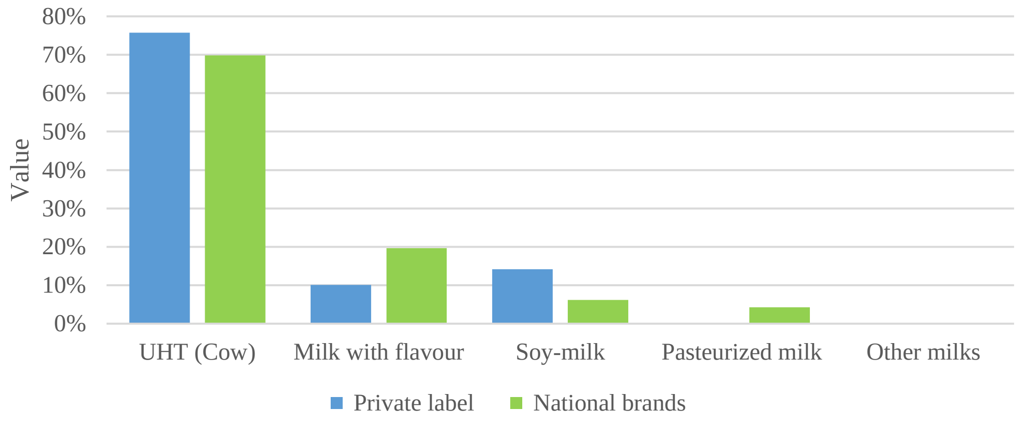
Source: Nielsen, 2017 - Private labels report W32

Figure 6 - Milk: value by brand (%) - breakdown by type, YTD 2017



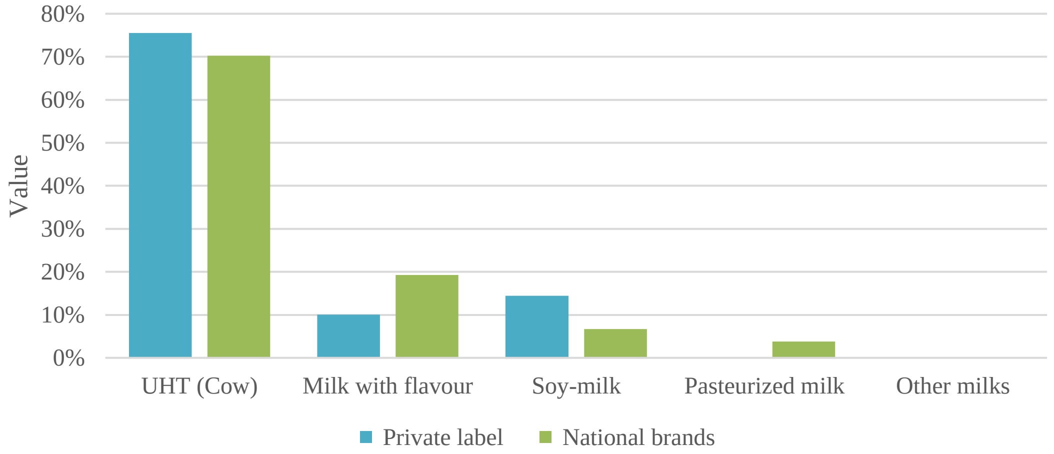
Source: Nielsen, 2017 - Private labels report W32

Figure 7 - Milk: value by type (%) - breakdown by brand, YTD 2016



Source: Nielsen, 2017 - Private labels report W32

Figure 8 - Milk: value by type (%) - breakdown by brand, YTD 2017



Source: Nielsen, 2017 - Private labels report W32

Appendix B – Interview and Survey

Appendix 1.1 – Proposed Interview Guide in English

Section 1 – Private label sector in Portugal

What are the three product categories in which private labels are most successful?

1. Why do you think consumers buy private label brands in these product categories?
2. Among these categories, do you think that the reasons for the choice of a private label brand in category 1 are the same reasons for the choice of brand 2 and 3?

Section 2 – Milk Market in Portugal

Based on your experience and information you might have on the milk market:

3. What is/are the milk brand/s that sell the most in Portugal?
    i. Among national brands and Private label brands?
    ii. Please indicate the top 3 brands (measured in sales value)
4. What are the main differences between national brand milks and private label milks?

Section 3 – Milk Consumers

5. Is it possible to identify different types of milk consumers?
6. Is there a private label milk consumer profile?
7. Is the consumer and the buyers the same person?
    a. If not, who chooses which product/brand to buy?

Section 4 – Hypotheses validation

8. What are the factors that people use to choose which brand of milk to buy?

Based on the literature, there are six factors that seem to influence the buying decision of regarding which brand (national or private brand) of milk to buy. I would like to briefly introduce you these factors in order to understand if, from a practical/real perspective, they all influence the buyer decision. These six factors can be organized in two groups: the first includes the factors related to the product category and the second include the factors related with private labels in general.

Group 1

a. Differentiation among the milks in the market: the low differentiation of milk products is associated with the purchase of a private label milks
b. Brand Equity of milk brands ("the added value endowed on products and services" by the brand): the low level of brand equity is associated with the purchase of private label milks
c. Brand Loyalty within the milk product category ("the degree to which clients have positive attitudes towards brands, showing commitment and a desire to continue buying them in the future"): low brand loyalty is associated with the purchase of private label milks
d. Importance of price in the product category ("the degree to which consumers focus exclusively on paying low prices"): high degree of price consciousness is associated with the purchase of private label milks
e. Importance of the price-quality relation ("concern for paying low prices subject to some quality constraints", the relation between perceived costs and perceived benefits): high degree of value consciousness is associated with the purchase of private label milks

Group 2

f. Overall perception of private labels: a positive perception of private labels is associated with

g. the purchase of private label milks

Appendix 1.2 – Proposed Interview Guide in Portuguese

Secção 1 – Dados gerais sobre a marca branca

Qual é o top 3 de categorias de produtos em que as marcas brancas são mais sucedidas?

1. Porque é que acha que os compradores optam por marcas brancas nestas categorias?
2. Acha que os motivos que levam as pessoas a comprar a marca branca na categoria 1 são os mesmo que na categoria 2 e/ou 3?

Secção 2 – Dados sobre o leite

De acordo com a sua experiência profissional e informações sobre o mercado que tenha:

3. Quais são os leites mais vendidos na sua loja?
    i. Marcas ou marcas brancas?
    ii. Por favor indique o nome das marcas mais vendidas (top 3)
4. Quais são as principais diferenças (em termos de propriedades, design e marketing) entre os leites de marca e os leites de marca branca?

Secção 3 – Consumidores de leite

5. Existem diferentes tipos de consumidores de leite?
6. Existe um perfil especifico para consumidores de leites de marca branca?

7. O consumidor e o comprador são a mesma pessoa?
    a. Caso a resposta à pergunta 8 seja não**:** quem faz a escolha do produto/marca?

Secção 4 – Validação das hipóteses desenvolvidas

8. Quais os fatores utilizados pelas pessoas para escolherem o leite?

Com base na literatura existe seis fatores que se esperam vir a influenciar a decisão de escolha entre leite de marca branca ou não. Gostaria agora de discutir muito brevemente esses fatores consigo por forma a verificar se de um ponto de vista mais prático, todos eles influenciam a escolha do consumidor. Estes seis fatores estão divididos em dois grupos: o primeiro inclui fatores relacionados com a categoria de produtos, o segundo inclui fatores relacionados com as marcas brancas em geral.

Grupo 1 – relacionados com o leite

a. Diferenciação entre os leites oferecidos no Mercado: a reduzida diferenciação dos leites está associada à compra de leite de marca branca
b. Valor adicionado pelas marcas no caso dos leites: o reduzido valor adicionado pela marca no caso dos leites, está associado à compra de leite de marca branca
c. Lealdade para com as marcas de leite (o nível que os clientes têm atitudes positivas para com a marca, demonstrando vontade de continuar a comprar a marca no futuro): a reduzida lealdade para com as marcas de leite está associada à compra de leite de marca branca

d. Importância dada aos preços dos leites (o nível de importância de pagar o preço mais baixo): a elevada importância do fator preço no caso dos leites está associada à compra de leite de marca branca

e. Importância dada ao valor, ou seja, à relação qualidade-preço no caso dos leites (o nível de pagar preços baixos mediante critérios mínimos de qualidade): a elevada importância da relação qualidade-preço no caso dos leites está associada à compra de leite de marca branca

Grupo 2

f. Perceção dos produtos de marca branca em geral: uma boa perceção/perceção positiva das marcas brancas está associada à compra de leite de marca branca

Appendix 2.1 – Questionnaire Guide in English: Questionnaire on Consumption and criteria to choose milk

Introduction

The present questionnaire intends to gather data to develop a Master Thesis at Nova School of Business and Economics (Universidade Nova de Lisboa) on the factors of choice of private label milk in super and hypermarkets in Concelho de Setubal.

The concept of private label (or white label) refers to any distributor brand, such as Continente and Pingo Doce brands.

The concept of National brand (or name brand) refers to what is usually considered a "brand", such as Mimosa and Agros.

For the purpose of this study, 'milk' refers to the standard milk: UHT and pasteurized (Whole milk, semi-skimmed and skimmed milk). Soy-based or other cereals-based drinks are not considered milk.

Your participation is confidential and should take less than 10 minutes.

Please answer all the questions.

In case you want to contact me, send an email to: 22308@novasbe.pt

Thank you!

Filter Questions

1. Are you portuguese?

Yes	
No (END)	

2. Did you shop in a super and/or hypermarket in Concelho de Setúbal, at least once, in the last 2 months?

Yes	
No (END)	

3. Did you buy MILK, at least once, in the last 2 months?

Yes	
No (END)	

*If **at least one** of your answers to these three questions was **negative – 'NO' –** please **do not proceed**. Thank you for your collaboration but you do not belong to the target of this study.*

If all your answers are positive, please, move on to the next question.

Section 1

1. When do you shop at a supermarket? (please select the option that best reflects your situation)

Less than once a month	
Once a month	
Every 2 weeks	
Every week	
More than once a week	
Everyday	

2. With whom do you go shopping at a supermarket? (please select the option that best reflects your situation)

Alone	
Wife/Husband/Boyfriend/Girlfriend and child(ren)	
Wife/Husband/Boyfriend/Girlfriend	
Child(ren)	
Grandchild(ren)	
Friend(s)	
Mother/Father	
Other(s)	

Section 2

1. Classify, from 1 to 5 each of these variables, according to their level of importance (with 1 meaning "not important" and 5 meaning "extremely important") in your milk choice in supermarkets?

	1- not important	2- not very important	3 – important	4 – very important	5- extremely important
Brand					
Flavor					
Price					
Price-Quality relation					
Publicity/Promotion activities					
Promotional discounts					
Product design					
Health concerns (e.g: food intolerances)					
Ethical reasons (e.g: sustainable production)					

2. Did you buy, at least one milk of these brands in the last 3 months?

Yes	
No	

3. How many packs of milk (1 pack=6 packages of 1 litre) do you buy in a regular month? (select the option that best describes your situation)

Less than 1 pack	
1 to 2 packs	
3 to 4 pack	
More than 4 packs	

Section 3

1. Classify from 1 to 5 (with 1 meaning "strongly disagree" and 5 meaning "strongly agree") the following sentences according to your level of agreement with them.

	1 – strongly disagree	2 - disagree	3 – neither agree nor disagree	4 – agree	5 – strongly agree
For me there is no difference among the different brands of milk available in the market.					
When I buy milk, I buy any brand.					
I usually do not spend a lot of time in the supermarket choosing among the different milk brands available.					
I believe unbranded milk products are as good as branded milk products.					
Buying milk of national brands makes me feel good.					
The milk of one specific brand is better than the milk of all the other brands.					
In the case of milk products, brands add a lot of value to the products.					
I have a favourite brand of milk.					
I only buy my favourite brand of milk.					
I worry a lot about the brand of milk I buy.					
I'm willing to make an effort to look for my favourite brand of milk.					
Generally, I think the higher the price of a milk product, the higher its quality.					
The money I save looking for low prices does not compensate for the time and effort spent.					
I always choose the lowest-priced (per litres) milk in the store.					

I shop at more than one store to take advantage of low prices.					
I normally look for products with low prices, but I only buy them if they meet my quality requirements.					
When I shop milk, I compare prices of different brands to be sure I make the most of my money.					
When I buy milk, I always try to maximise the quality obtained for the money spent.					
I worry a lot about paying low prices, but I worry equally about product quality.					
In most product categories, the best purchase is always store brands/private labels.					
Taking into consideration the importance of money, I prefer store brands to national brands.					
Buying private labels makes me feel good.					
When I buy private label products, I always feel like I'm getting a good deal.					
Generally, private label products are low quality.					
I feel happy when I find private labels available in the categories of products I usually buy.					

Section 4

1. Age:

Less tha 18 years old	
[19-25]	
[26-40]	
[41-60]	
More than 60 years old	

2. Gender:

Female	
Male	

3. For how many people do you shop (including yourself)?

1 (only for youself)	
2 (yourself and another person)	
3 (yourself and two other people)	
4 (yourself and three other people)	
5 or more (yourself at at least, four other people)	

4. Do you or any of the people to whom you shop have, at least, one health constraints?

Yes	
No	

5. Are you responsible for at least one child until 12 years old?

Yes	
No	

6. Monthly household income:

Inferior to 600 €	
[600-1200] €	
[1200-2300] €	
[2300-3400] €	
Superior to 3400 €	

Section 5

1. Please rank from 1 to 3, the 3 most important factors on this list, according to their level of importance in the choice of milk in a supermarket.

Brand	
Flavor	
Price	
Price-Quality relation	
Publicity/Advertisement	
Promotional discounts	
Product design	
Health concerns (e.g: food intolerances)	
Ethical reasons (e.g: sustainable production)	

Thank you for your collaboration!

Appendix 2.2 – Questionnaire Guide in Portuguese: Questionnaire on Consumption and criteria to choose milk

Introdução:

O presente questionário tem como objetivo recolher dados para elaboração de uma tese de Mestrado de Gestão na Faculdade de Economia - Universidade Nova de Lisboa, que pretende estudar os fatores de escolha do leite de marca própria em super e hipermercados no ***Concelho de Setúbal.***

O termo ***marca própria*** *(ou marca branca) refere-se a qualquer marca de um distribuidor, como por exemplo a marca Continente ou Pingo Doce.*

O termo ***marca nacional*** *(ou marca de fornecedor) refere-se ao que habitualmente é considerado uma "marca", como por exemplo a Mimosa ou Agros no caso específico do leite.*

Ainda, no âmbito deste estudo, o termo ***leit****e refere-se apenas a leite standard, ou seja, UHT ou pasteurizado (Gordo, Meio-Gordo ou Magro). Bebidas à base de soja ou outros cereais não são consideradas leite.*

A sua colaboração – caso seja um dos clientes procurados - é confidencial e deverá durar ***menos de 10 minutos.***

Por favor responda a ***todas as questões****!*

Caso queira entrar em contacto comigo, envie e-mail para: 22308@novasbe.pt

Muito obrigada!

Filtros:

1. É português?

Sim	
Não (FIM)	

2. Efetuou compras em super e/ou hipermercados no concelho de Setúbal, pelo menos, uma vez nos últimos 2 meses?

Sim	
Não (FIM)	

3. Comprou LEITE, pelo menos, uma vez nos últimos 2 meses?

Sim	
Não (FIM)	

Caso a resposta a, ***pelo menos, uma*** *das três perguntas anteriores tenha sido negativa –* ***Não*** *- , não prossiga com o questionário, pois não pertence ao grupo de clientes-alvo para análise. De qualquer forma,* ***muito obrigada*** *pela sua colaboração!*

Secção 1

1. Com que frequência faz compras no supermercado? (indique a opção que melhor descreve a sua situação)

Menos que uma vez por mês	
Uma vez por mês	
De duas em duas semanas	
Uma vez por semana	
Mais que uma vez por semana	
Todos os dias	

2. Com quem faz compras no supermercado? (assinale a opção que melhor descreve a sua situação)

Sozinho/a	
Esposo/a ou namorado/a e filho/a(s)	
Esposo/a ou namorado/a	
Filho/a(s)	
Neto/a(s)	
Amigo/a/(s)	
Mãe e/ou pai	
Outros.	

Secção 2

1. Classifique de 1 a 5 cada um dos seguintes fatores, de acordo com o seu grau de importância (sendo 1 – não importante e 5 – extremamente importante) na escolha de que leite comprar no supermercado?

	1-não importante	2- pouco importante	3 – importante	4 – muito importante	5- extremamente importante
Marca					
Sabor					
Preço					

Relação qualidade-preço					
Campanhas publicitárias					
Descontos promocionais					
Design do produto					
Motivos de saúde (ex: intolerâncias)					
Questões éticas (ex: produção sustentável)					

4. Escolheu comprar algum pacote de leite de uma das seguintes marcas nos últimos 3 meses?

Sim	
Não	

5. Quantas paletes de leite (1 palete=6 pacotes de 1 litro) compra num mês típico? (Assinale a opção que melhor descreve a sua situação)

Menos que 1 palete	
Entre 1 a 2 paletes	
Entre 3 a 4 paletes	
Mais que 4 paletes	

Secção 3

1. Classifique de 1 a 5, sendo 1 – discordo completamente e 5 – concordo completamente, o seu nível de concordância com cada uma das seguintes frases:

	1 – discordo completamente	2 - discordo	3 – não concordo nem discordo	4 – concordo	5 – concordo completamente
Para mim não existe qualquer diferença entre as várias marcas de leite disponíveis no mercado (incluindo marcas próprias)					

Quando compro leite, compro uma marca qualquer.					
Normalmente não perco muito tempo no supermercado a escolher que marca de leite comprar.					
Eu acredito que os leites de marca própria são tão bons como os leites de marcas nacionais.					
Comprar leite de marcas nacionais faz-me sentir bem.					
O leite de uma determinada marca é melhor que o leite de outras marcas.					
No caso dos leites, as marcas acrescentam bastante valor aos produtos.					
Eu tenho uma marca de leite favorita.					
Eu só compro a minha marca favorita de leite.					
Preocupo-me muito sobre que marca de leite comprar.					
Estou disposto a fazer um esforço para encontrar a minha marca de leite favorita.					
Em geral eu penso que quanto mais caro for um leite, maior é a sua qualidade.					
O dinheiro que poupo a procurar leites mais baratos não compensa o tempo e o esforço dispensado.					
Escolho sempre o leite mais barato (por litro) da loja.					
Eu faço compras em mais do que uma loja para aproveitar os preços mais baixos.					
Eu geralmente procuro produtos com preços mais baixos, mas só os compro se cumprirem os meus padrões de qualidade.					
Quando compro leite, eu comparo os preços de diferentes marcas para ter a certeza de que tiro o melhor partido do meu dinheiro.					
Quando compro leite, tento sempre maximizar a qualidade obtida em relação ao dinheiro gasto.					

Eu preocupo-me muito com pagar preços baixos, mas preocupo-me igualmente com a qualidade do produto.					
Na maioria das categorias de produtos, a melhor compra são sempre as marcas próprias.					
Tendo em conta a importância do dinheiro, eu prefiro marcas próprias a marcas nacionais.					
Comprar marcas próprias faz-me sentir bem.					
Quando compro produtos de marcas próprias, sinto sempre que estou a fazer um bom negócio.					
Geralmente os produtos de marcas próprias têm baixa qualidade.					
Eu sinto-me contente quando encontro marcas próprias nas categorias de produtos que costumo comprar.					

Secção 4

1. Idade:

Menos de 18 anos	
[19-25]	
[26-40]	
[41-60]	
Mais de 60 anos	

2. Género:

Feminino	
Masculino	

3. Contando consigo, para quantas pessoas se destinam as suas compras?

1 (só para si)	
2 (para si e mais uma pessoa)	
3 (para si e mais duas pessoas)	
4 (para si e mais três pessoas)	
5 ou mais (para si e, pelo menos, mais quatro pessoas)	

4. Você ou alguma das pessoas para quem faz compras, sofre de, pelo menos, uma restrição alimentar?

Sim	
Não	

5. Tem alguma criança até aos 12 anos à sua responsabilidade?

Sim	
Não	

6. Indique o rendimento mensal agregado da sua casa:

Inferior a 600 €	
[600-1200] €	
[1200-2300] €	
[2300-3400] €	
Superior a 3400 €	

Secção 5

1. Enumere de 1 a 3, APENAS os 3 fatores mais importantes da lista de acordo com o seu grau de importância na escolha de que leite comprar no supermercado.

Marca	
Sabor	
Preço	
Relação qualidade-preço	
Campanhas publicitárias	
Descontos promocionais	
Design do produto	
Motivos de saúde (ex: intolerâncias)	
Questões éticas (ex: produção sustentável)	

Muito obrigada!

Appendix 3 – Transcript of the interview to the "Diretor de Produto – Responsável Dr. Rui Ferreira Oliveira" (Portuguese)

ENTREVISTADOR: Bom dia! Estruturei esta entrevista em 4 secções. Primeiro queria discutir consigo aspetos mais gerais sobre as marcas brancas, depois o caso dos leites mais especificamente, dos consumidores e depois verificava então se as hipóteses desenvolvidas com base na literatura fazem sentido de um ponto de vista mais prático.

ENTREVISTADO: O seu tema da tese tem a ver com o leite de marca branca ou isto é só uma parte da tese?

ENTREVISTADOR: É o tema da tese. Eu estou a estudar quais são os fatores que levam as pessoas a escolher leites de marca branca. Inicialmente queria estudar os fatores que levam as pessoas a escolher produtos de marca branca, mas quando comecei a fazer pesquisa descobri que os fatores que influenciam a escolha e que determinam se as marcas brancas são mais sucedidas ou não, dependem muito da categoria de produto, e a categoria onde as marcas brancas são mais sucedidas, de acordo com as informações e estudos que eu encontrei, é a dos leites, e então eu decidi focar nesta categoria. (pausa) E depois também vi alguns fatores que quero testar, mas antes de iniciar o trabalho de campo e de começar a recolher dados, queria validar do ponto de vista prático se fazem sentido ou não.

ENTREVISTADO: *(em concordância)* Hum hum

ENTREVISTADOR: Então, de um ponto de vista mais geral, de acordo com a sua experiência, quais é que considera serem as três categorias de produtos onde as marcas brancas são mais sucedidas? Ou seja, em que categorias é que os produtos de marcas brancas se vendem mais?

ENTREVISTADO: Ahh okay…

ENTREVISTADOR: Se tiver informação que possa partilhar quanto a isto, claro!.

ENTREVISTADO: Para já temos que ver que, dentro das categoria há a participação (é o que chamamos), a participação da marca própria. Pode haver categorias de produto onde a participação da marca própria é muito forte ou que quase já nem há marca de fornecedor ou marca nacional (a conhecida), o que faz com que a marca própria tenha uma participação muito forte nessa categoria. No entanto não quer dizer que em valor ou em volume, a marca própria seja a mais importante.

ENTREVISTADOR: Exato.

ENTREVISTADO: São duas coisas diferentes. Se vamos pela participação da marca própria em categorias vamos ter categorias de um certo tipo. Se vamos mesmo pelo volume, a marca própria pode vender mais e, no entanto, ter uma participação dentro dessa categoria, inferior. Está a perceber? Posso dar-lhe exemplos.

ENTREVISTADOR: Sim, sim. E se formos pela participação? O que é que me indicaria? Quais são as categorias mais sucedidas?

ENTREVISTADO: Normalmente as categorias de produto mais básicas, com menos transformação, são aquelas em que as marcas brancas têm mais participação. De facto, (pensando) o arroz, o leite – por acaso no leite, a participação é importante mas não é onde a participação é mais importante. Há marcas… *(interrompe)* … bem, depois falamos especificamente do leite, mas há outros fatores que entram em conta que podem alterar as vendas e forçosamente, as participações – em geral, os produtos base: óleo, azeite, arroz, açúcar, sal, … são aqueles que têm uma participação maior. São os produtos em que os clientes, de uma forma mais evidente, percebem que não há diferença entre uma marca própria e uma marca de fornecedor.

ENTREVISTADOR: Okay….obrigada. Acabou por responder já à pergunta seguinte que era se acha que existe alguma diferença entre os motivos de escolha da marca branca nestas categorias? Por exemplo, no caso do arroz, as pessoas escolhem arroz de marca branca por um determinado fator. Acha que esse fator é diferente no caso do sal ou do azeite? Se entre esses produtos básicos menos diferenciados, digamos assim, existe alguma diferença entre os fatores de escolha ou se, à partida, são mais ou menos os mesmos fatores que levam as pessoas a escolher a marca branca.

ENTREVISTADO: A pergunta é quais são os fatores que levam os clientes a escolher entre uma marca própria ou uma marca de fornecedor?

ENTREVISTADOR: Não é exatamente isso. Referiu agora o azeite, o sal, o arroz… esse tipo de produtos. As pessoas escolhem azeite de marca branca por um determinado fator. E escolhem arroz de marca branca por outro fator. A questão é se esse fator acaba por ser o mesmo?

ENTREVISTADO: Exato. Já estou a perceber melhor a pergunta. Se calhar fazia aqui um enquadramento da história da marca própria. Portugal é um dos países na europa em que a taxa de participação da marca própria é bastante elevada…penso que é o terceiro….ou quarto – Espanha também não está mau! Penso que o terceiro lugar atualmente deve ser combatido entre Espanha e Portugal. Primeiro e segundo, de longe, Inglaterra e Suíça. Por motivos diferentes, penso eu. É assim, a marca própria em Portugal começou a ter bastante protagonismo, ajudado por uma questão de proposta de oferta – Temos operadores muito fortes como é o caso do Pingo Doce. O Pingo Doce tem uma estratégia de massificação da sua marca de forma forte que faz com que os clientes levem mais, e também tem uma oferta de marcas de fornecedores muito mais reduzida, e portanto, como é um operador muito forte faz com que a quota da marca branca aumente. É muito diferente do nosso caso… Mas isso faz com que a quota de mercado seja forte. – E a situação que vivemos da crise, desde 2010 – com princípio em 2008, mas em termos de impacto económico no dia a dia dos portugueses, teve mais impacto a partir de 2010 – o que também ajudou bastante a que as pessoas começassem a procura mais as marcas próprias. Ai sim, *(em 2010)* tivemos um forte crescimento das marcas própria nessa altura. Portanto, parte da crise ajudou-nos bastante a desenvolver as vendas da marca própria. No entanto as pessoas, os consumidores em geral – também graças à nossa comunicação e à comunicação dos nossos concorrentes – já perceberam que marca própria é "uma marca inteligente": para que é que hei de comprar a marca de fornecedor, se realmente, a marca própria me traz os mesmos serviços ou as necessidades que eu pretendo? Porque é assim que a marca própria é gerida! Em termos de construção do produto que fazemos, queremos mesmo o mesmo nível das marcas reconhecidas. Portanto, foi isso que aconteceu nos últimos tempos e que fez com que as participações das marcas próprias fossem fortes. Agora, em Portugal, a taxa de participação da marca própria é altíssima – anda à volta dos 38% - e vai flutuando mais em função das promoções que as marcas de fornecedores vão fazendo. E era isto que eu também queria dizer. As pessoas com a crise descobriram ainda mais as marcas próprias, por razões económicas, e foram-se habituando. A necessidade económica levou à experimentação, e as pessoas experimentando, deram-se conta de que afinal o produto era mais barato, e ouviu-se muitas vezes: "ah, isto é o mesmo sabor! Isto afinal é igual! Isto afinal tem a mesma cor!" *(rindo)* etc, etc, … e isso elevou e manteve-se por aí. Agora a taxa de participação está, ligeiramente, flutuando. Se uma marca de fornecedor faz uma promoção e o produto fica ao preço da marca própria, as pessoas vão comprar, em geral, a marca com mais notoriedade para elas. *(Concluindo)* Foi assim que a marca branca ganhou protagonismo. Claro que isto, consoante as categorias, varia. É mais evidente nos produtos sociais chamados básicos, como eu já disse, porque aí, para os clientes é evidente: um arroz é um arroz, um leite é um leite, uma água é uma água, portanto aí as taxas de participação das marcas brancas são fortes. Nos produtos com uma transformação mais elaborada, normalmente na indústria agroalimentar, as bolachas, cereais ou pratos preparados, aí as pessoas já…é mais difícil porque já têm um ponto de comparação. Há sempre diferença nas receitas. Ou até mesmo na cosmética, é mais evidente, embora as marcas brancas apostem bastante na qualidade da cosmética, é algo que já toca mais às pessoas por isso o nível de desconfiança já é maior, e mesmo assim, *(referindo-se à taxa de participação das marcas brancas)* vai-se crescendo. Portanto, as taxas de participação dependem muito disso. No caso específico do leite, já entram outros fatores. Aí estamos a falar de uma matéria prima em que há uma elevada importância política ao nível dos produtores. Penso que ouviu falar na europa, e em Portugal em particular, na crise dos agricultores e produtores de leite que estavam a vender o leite abaixo do custo de produção. Portanto, há também uma regulação política de garantir um preço mínimo do preço do leite. O leite é muito sujeito ao fator preço. E realmente, neste momento, como é uma matéria prima, um produto de necessidade básica para os clientes, a grande maioria dos clientes já percebeu que o leite primeiro preço não é muito diferente do *standard* da Mimosa por exemplo. Portanto, aí os clientes compram o mais barato da altura. Se temos o leite de marca própria em promoção, eles vão comprar marca própria, se na semana seguinte esta o leite da Mimosa ou da Agros mais barato, eles vão comprar esse. Nos produtos básicos, o fator promocional é fundamental.

ENTREVISTADOR: Okay…. e em termos gerais, quais são os leites mais vendidos em Portugal: marcas próprias ou marcas de fornecedores?

ENTREVISTADO: Por acaso isso é um dado que eu não tenho aqui à mão mas consigo saber com facilidade e posso passar-lhe essa informação. São dados da Nielsen…quase públicos, posso dar-lhe essa informação.

ENTREVISTADOR: Agradeço! Eu encontrei dados mas foi para a Europa. Para Portugal em específico não encontrei.

ENTREVISTADO: Sim eu tenho os dados atualizados. Nos recebemos as quotas de mercado com quatro semanas de gap. E posso dar-lhe, sem problemas. *(continua)* mas normalmente a marca de leite mais vendida no mercado é a Mimosa. Depois há algum que seja de origem, mas Mimosa é forte, em geral, em Portugal. Perde alguma notoriedade se formos mais para o norte de Portugal, onde a Agros já é mais forte ou no centro de Portugal, por razões históricas e há marcas que são dessa zona de Portugal – embora hoje esteja tudo concentrado num grande produtor que é a Lactogal, o grande operador de leite em Portugal. A Mimosa é a marca mais forte a nível nacional e está presente em todas as regiões, mas consoante vamos viajando pelas regiões, pode ser um pouco diferente. Em certos pontos do Norte podemos ter a Agros mais forte porque é a marca forte do norte e é produzida em Vila do Conde. No centro já podemos ter pontualmente ali na região da Figueira da Foz, a Gresso porque é também da cooperativa nativa daquela zona e no restante de Portugal a Mimosa. Mas mesmo assim, se mesmo a Agros que é uma marca naturalmente mais forte no Norte estiver em promoção, as pessoas todas (não só no norte) vão tendencialmente comprar esse leite.

ENTREVISTADOR: Certo. E considera que existe alguma diferença entre as marcas próprias e as marcas de fornecedores? Em termos de produção já me disse que não, mas em termos de design e de marketing, quais são as principais diferenças?

ENTREVISTADO: Isso é exatamente o que permite que as marcas próprias sejam mais baratas do que as marcas de fornecedor. É exatamente isso. Nós conseguimos vender mais barato que as marcas de fornecedor porque os custos inerentes ao desenvolvimento, marketing de imagem e isso tudo, não são refletidos no produto. Porque esse culto de marketing já é marketing da nossa insígnia. Não quer dizer que nós não temos esse custo, mas já o englobamos em toda a nossa comunicação global. Ele não vai ser aplicado ao produto, que é o que faz uma marca de fornecedor. Uma marca de fornecedor como a

Mimosa, tem o custo de fazer o leite, de embalá-lo, mas também tem o custo das publicidades que gostamos de ver na televisão. Por ventura, muito bonitos, mas isso tem um custo. É muito caro. Tem o custo da produção e tem o custo da colocação no *media*, e então esse custo é que é brutalmente caro. Aliás, 80% dos custos são estes. Portanto, todos estes valores de marketing, é que eles têm que aplicar ao produto.

ENTREVISTADOR: Exato. Claro, claro.

ENTREVISTADO: Penso que…é isso que…permite a grande diferença, porque os custos de produção são os mesmos. Os custos de comprar ao produtor… menos cêntimo, mais cêntimo, mas é igual. O custo de produção: também as fábricas são iguais; são os mesmos sistemas operativos que produzem o produto final, e é isso. A grande diferença está baseada nisto.

ENTREVISTADOR: E em termos de distribuição, para fazerem com que o produto chegue ao consumidor final, também é mais ou menos o mesmo? Os custos também são semelhantes?

ENTREVISTADO: Sim, são os mesmos circuitos. Os circuitos são os mesmos. Por acaso…especificamente a Auchan, nós temos uma estratégia de não trabalhar com os líderes de mercado. *(Pausa)* Por uma questão estratégica que neste momento acho que não vale a pena desenvolver. Mas há concorrentes que trabalham mesmo, fazem o leite lá com…lá com… a Mimosa. Portanto, a fábrica da Mimosa também faz marca branca. Isso até é fácil de reconhecer, basta ter um bocado de experiência. Porque é obrigatório... Todos os produtos lácteos têm um selo sanitário, que é obrigatório, e o selo sanitário sendo obrigatório, ligado à fábrica, consegue-se ver que se for uma marca própria de uma insígnia, se vir o selo sanitário que é igual ao da Mimosa, já sabe que é feito na mesma fábrica *(risos).*

ENTREVISTADOR: Ok… E em termos de consumidores, existem diferentes tipos de consumidores de leite? Existe alguma segmentação nesse sentido?

ENTREVISTADO: Sim, cada vez mais *(pausa para pensar*)… também por efeitos de *media* muito fortes. O leite sempre foi um produto muito consumido – muito, muito, muito! Nos últimos anos tem perdido vendas….principalmente há dois anos – penso que foi há dois anos – quando saiu aquela famosa notícia: afinal o leite faz mal.

ENTREVISTADOR: Pois…

ENTREVISTADO: Então *(risos)* Então aí as coisas começaram mesmo a correr mal para as vendas do leite. Houve baixa de consumo que criou alguns planos na Europa, porque havia excesso de produção – foi por isso que preços foram por aí abaixo – como digo, isto é tudo completo, está tudo ligado.

ENTREVISTADOR: Sim…

ENTREVISTADO: *(pensando)…* portanto os preços foram por aí abaixo, colocou planos aos agricultores…portanto baixa do consumo e a… e a…. Já existia, mas permitiu também um crescimento muito forte nas alternativas do leite. Portanto, embora seja trabalhado na mesma categoria, na realidade são produtos completamente diferentes! Tanto que são bebidas à base de soja, ou de outros cereais. Portanto houve um crescimento muito forte. Os velhos começaram a baixar e as bebidas alternativas começaram a subir drasticamente: soja, aveia, arroz, … e também*…(pensando)…* cresceu bastante – não só por estes motivos, mas também outros – houve um crescimento muito forte dos leites sem lactose. *(Concluindo)* Ou seja, os leites…o consumo dos leites *standard* baixou mas temos o crescimento de alternativas ao leite e de leites para intolerantes a lactose – portanto leites sem lactose -, leites enriquecidos…com vitaminas, leite especial para crianças, leite sénior … *(risos)…*portanto, aparece isso.

ENTREVISTADOR: Ok…. E existe algum perfil específico para os consumidores de marca branca?

ENTREVISTADO: Não. Não existe mesmo. Há….(pausa)….nós temos dados mesmo independentemente da disponibilidade de dinheiro que os agregados familiares têm. Há pessoas com muito dinheiro que só compram marca própria porque têm uma formação que os leva a, automaticamente, ter essa cultura que sabe que quando compra marca própria está a fazer a tal compra inteligente. Há pessoas que infelizmente, por falta de dinheiro, compram forçosamente marca branca. Até depois dentro da marca branca, tendencialmente compra a nossa oferta mais económica. Mas pronto! Há as pessoas que compram marca branca por necessidade e há pessoas que compram marca própria por uma cultura de já perceber que afinal é a mesma coisa.

ENTREVISTADOR: Ok…. Não sei se tem acesso a esta informação, mas o consumidor e o comprador, no caso do leite, geralmente são a mesma pessoa ou quem costuma comprar são por exemplo ….

ENTREVISTADO: Se…há pessoas que recomendam comprar o leite?

ENTREVISTADOR: Não, não. Se, por exemplo, quem vai ao supermercado e compra é a pessoa que consome ou se vai um representante do agregado familiar, por exemplo, a mãe, e compra, e depois quem consome são os filhos?

ENTREVISTADO: Ah sim! Mas isso… a chamada "dona de casa" ainda é uma realidade.

ENTREVISTADOR: Pois…

ENTREVISTADO: 80% dos nossos clientes são senhoras. *(pausa)* É por isso que até, normalmente todo o layout e apresentação das estações nos hipermercados e supermercados são muito mais femininos. Porque essa realidade ainda se verifica.

ENTREVISTADOR: Eu estou a perguntar porque depois quando for recolher os dados, o que me interessa saber é quem toda a decisão na loja então…por isso é que estou a perguntar…

ENTREVISTADO: No nosso caso, Auchan, grosseiramente 80% das compras são feitas pelo sexo feminino.

ENTREVISTADOR: Ok. Já agora, uma curiosidade: no caso da Auchan, têm mesmo a marca da Auchan e depois têm a marca do Polegar. Pode explicar-me mais ou menos a estratégia?

ENTREVISTADO: Hum hum. É muito fácil. Também se verifica noutra insígnias. A marca é toda Auchan – a assinatura está lá sempre. O Polegar é exatamente a identificação dos nossos produtos mais básicos, os chamados produtos económicos ou primeiros preços, para ser mais claro. Portanto, é tudo Auchan. O Polegar é o que identifica os nossos produtos mais baratos. Como digo… mais barato, no leite, o que vai fazer a diferença entre… por acaso até deixámos de ter porque não havia qualquer diferença: o leite que estava na embalagem do primeiro preço era rigorosamente igual ao leite da marca Auchan. Como não havia diferenciação, acabou-se. Mas é mesmo só por isso. É só por isso. E portanto, a marca é a nossa marca, inclusivamente, primeiro preço.

ENTREVISTADOR: Ok, Ok.

ENTREVISTADO: Num produto mais complexo, mais transformado, esse produto consegue ser mais económico por utilizar "ingredientes menos nobres". Por exemplo, … (pensando)… um exemplo mais claro é… um bolo. Um bolo Auchan vai ter todo o nível de qualidade que é exigido a uma grande marca conhecida. Um produto, o mesmo bolo primeiro preço vai ter a mesma receita, mas em vez de ser um bolo que se calhar leva 25% de manteiga, vai levar 25% de gordura vegetal. Em termos de preço, claro, é um ingrediente menos nobre e mais barato. O cliente, o consumidor vai ter o mesmo produto, mas com ingredientes mais económicos. Claro, altera ligeiramente o sabor, …

ENTREVISTADOR: A textura, … essas coisas todas.

ENTREVISTADO: Exato, mas pronto, é isso a explicação do primeiro preço.

ENTREVISTADOR: Pronto! Então agora queria só discutir consigo um bocadinho **os** fatores que eu encontrei na literatura e que eu acho que fazem sentido estudar. Pronto, e queria que me desse a sua opinião, se acha que faz sentido, se não… se há mais algum que ache que faça sentido e não esteja aqui… Eu encontrei cerca de seis fatores: cinco deles estão relacionados com a categoria do leite em geral…atributos específicos dessa categoria; e o outro está relacionado com as marcas brancas em geral. Então o primeiro é a reduzida diferenciação que existe entre as várias marcas de leite. Pronto, este já discutimos…assumo que concorde…

ENTREVISTADO: Sim, sim claro!

ENTREVISTADOR: Depois, o outro é que o valor que a marca adiciona ao produto é reduzido nesta categoria também. Ou seja, a *brand equity* das marcas é baixa… não altera muito…

ENTREVISTADO: Estamos a falar do leite?

ENTREVISTADOR: Sim, sim. Só do leite.

ENTREVISTADO: Leite standard, certo? Meio-gordo, magro e gordo.

ENTREVISTADOR: Sim. Leite de soja e esses não.

ENTREVISTADO: Ou dos enriquecidos, etc.

ENTREVISTADOR: Não, não. É mesmo só standard.

ENTREVISTADO: Sim, sim, concordo.

ENTREVISTADOR: Depois o facto dos clientes serem pouco leais para com as marcas de leite. Também já falamos disto por causa dos descontos.

ENTREVISTADO: As promoções são um problema geral em Portugal. O nível promocional está muito alto.

ENTREVISTADOR: Sim, sim. Por acaso ontem numa aula estivemos a discutir isso, que o nível promocional era cerca de 48%

ENTREVISTADO: Sim, sim, sim. Nós temos dados internos que chegam aos 52%. Mas pronto, é brutal.

ENTREVISTADOR: Sim, realmente.

ENTREVISTADO: Para os modelos económicos é…do ponto de vista sustentável…e estabilidade económica…é complicado.

ENTREVISTADOR: Pois, nós estamos muito habituados aos descontos. (*risos)*

ENTREVISTADO: Mas são descontos que nem…são falsos. São falsos porque… Nós *(referindo-se à Auchan)* não praticamos isso, e os clientes reconhecem-nos por isso. Nós praticamos uma política de descontos diretos. Ou seja, o cliente compra um produto pelo preço final, mas sabemos que na concorrência – quer dizer, não há milagres! 50% de desconto…

ENTREVISTADOR: Ou mais!

ENTREVISTADO: Ou mais, sim sim! Mas na realidade o preço final é o nosso promocional normal e aliás, é muito fácil de perceber isso em Portugal. Como é que se consegue perceber isso em Portugal? Tem a oportunidade de ir às vezes a Espanha comprar um produto equivalente. Um produto que vendem em Espanha e em Portugal. O preço de venda normal, o chamado permanente, quando o produto não está em promoção - Geralmente até as meninas conseguem ver isso com alguma facilidade porque basta ir aos produtos, por exemplo, da L'óreal. Um produto conhecido…um produto de uma grande marca que é vendido nos dois países – e vê que quando esse produto não está em promoção, em Espanha, o preço está muito mais baixo e aqui está muito mais alto, para se conseguir fazer esses 50%. Na verdade, quando ele está em promoção, está ao mesmo preço do que em qualquer outro sítio. Porque o produto custa o mesmo a fabricar. Há aí uns preços que alguns concorrentes praticam para poder fazer essa comunicação de 50%. Na realidade não há nenhum produto…. Ou seja, para fazer 50%, o produto precisa de fazer 50% de margem e normalmente isso não é uma margem que se pratique.

ENTREVISTADOR: Mas do ponto de vista do consumidor, eu, pelo menos tenho essa perceção, de que se a pessoa vir que o produto está em promoção, por exemplo, leve 2 pague 1, leva logo mas às vezes até sai mais caro.

ENTREVISTADO: Sim, sim.

ENTREVISTADOR: Não está mais barato.

ENTREVISTADO: Não está não! Exatamente. Isso funcionou… mas é uma estratégia que tem um prazo de vida. Itália teve muito essa prática e ao fim de sete anos o negócio da distribuição em Itália rebentou. Não era sustentável. As pessoas só compravam em promoção. *(pausa)* E o produto quando está em promoção, a margem é quase nula.

ENTREVISTADOR: Pois, exato.

ENTREVISTADO: E como as pessoas só compravam em promoção, não houve nenhuma insígnia que…pronto! São empresas, têm que ganhar dinheiro!

ENTREVISTADO: Claro! Claro! *(pausa)* Depois, um dos outros fatores é que as pessoas realmente valorizam muito o fator preço…

ENTREVISTADOR: Sim

ENTREVISTADO: …quando vão comprar produtos básicos como o leite. *(pausa)* E também, simultaneamente, o valor. Ou seja, a relação qualidade-preço, que também é muito importante e que no caso das marcas brancas as pessoas já associam àquela “compra inteligente”.

ENTREVISTADOR: Sim

ENTREVISTADO: … Pronto, que a relação qualidade-preço nas marcas brancas é elevada.

ENTREVISTADOR: Depois relacionado com as marcas brancas – esta aqui é um bocadinho óbvia, faz sentido – que é: se as pessoas tiverem uma boa perceção das marcas brancas em geral, a probabilidade de optarem por um produto, um leite marca branca, também é mais elevada.

ENTREVISTADO: Sim, sim, sim. Quando o cliente vai descobrindo, por vários fatores, … vai percebendo que a promessa do produto está lá a um preço muito mais…portanto, a expectativa que ele tem do produto de uma grande marca reencontra na marca própria, e ele vai ficar contente. Ele vai aos poucos percebendo que não vale a pena gastar tanto dinheiro. Portanto, é a chamada…nós chamamos isso a compra inteligente. O cliente começa a perceber isso.

ENTREVISTADOR: Pois…*(pausa)*… pronto. Acha que há mais algum fator que deva incluir? Alguma coisa?

ENTREVISTADO: Não, não. Acho que está tudo…está tudo bem abrangente…todas as situações. Como digo…acho que não falta nada. Depois vai estudar situações de várias insígnias? Porque consoante as insígnias, as ofertas de marca própria são muito diferentes.

ENTREVISTADOR: Sim, sim.

ENTREVISTADO: Principalmente o Lidl e o Pingo Doce têm uma proposta de marca branca muito forte, de destaque. Estrategicamente, eles querem destacar de forma muito forte *(as marcas próprias*), relativamente às marcas de fornecedores. O Continente ou nós, somos mais equilibrados. Não é que queiramos esconder a marca própria – pelo contrário! Mas também damos espaço a alguma oferta e variedade. Portanto, isso também, altera um bocado os dados.

ENTREVISTADOR: Hum hum

ENTREVISTADO: Mas não é por querer. É mesmo por uma razão estratégica.

ENTREVISTADOR: Eu tinha pensado recolher na zona de Setúbal, porque eu sou de Azeitão. Tinha pensado recolher no Jumbo, Continente e Intermarché, eventualmente. Não queria ir para o Lidl porque já é uma estratégia um bocadinho diferente em termos de marcas…pronto, eles são um bocadinho diferentes, e então não queria estar a juntar com os outros.

ENTREVISTADO: Hum hum. Mas quer recolher o quê? O número de marcas próprias que cada um tem?

ENTREVISTADOR: Não. Recolher os dados dos clientes. Os questionários e as perceções dos consumidores.

ENTREVISTADO: Ah! Ok.

ENTREVISTADOR: Pronto, estava a pensar recolher nestes três supermercados, à partida. Focar nos consumidores destes supermercados.

ENTREVISTADO: Sim, sim…Sim. Embora o Lidl não deixe de ser um caso interessante…

ENTREVISTADOR: Sim, mas é um caso diferente. Não sei se devo misturar com os outros, porque… lá está!

ENTREVISTADO: Excluir o Lidl põe de fora um operador importante no mercado. Assim a…portanto, em termos de importância de distribuidores, o primeiro é o Continente, com 26, 27% de quota de mercado, logo a seguir, logo a seguir é o Pingo Doce, com também 25, 26% de quota de mercado. Portanto, esse dois, Continente e Pingo Doce, só esses dois já representam mais de 50% de quota de mercado, e por isso são importantes. E logo a seguir, o terceiro operador é o Lidl, com cerca de 16% de quota de mercado.

ENTREVISTADOR: Mas só de leites? Ou em geral?

ENTREVISTADO: Em geral, em geral, mas normalmente nos básicos reflete-se. E então o Lidl é importante porque é uma insígnia que como tem uma oferta muito mais estreita. Portanto, eles são grandes vendedores dos básicos. O Lidl, acho que, para mim, na minha opinião, não era de excluir….então especificamente para o leite.

ENTREVISTADOR: Ok…ok…

ENTREVISTADO: ..porque é um distribuidor importante do leite. O Lidl é… também quando se entra no Lidl – não sei se está, mais ou menos a visualizar…

ENTREVISTADOR: Sim, sim.

ENTREVISTADO: A entrar no Lidl…o leite é importante. Normalmente até se consegue encontrar o leite logo na entrada. Normalmente há dois ou três produtos que se encontram logo à entrada. No Lidl é geralmente o leite, a água e, às vezes, papel higiénico. São aqueles produtos mesmo mais vendidos. Portanto eles põem logo assim com uma massificação na loja importante. Em geral os produtos mais vendidos são fáceis de perceber numa loja. São aqueles que têm um espaço maior, para evitar a reposição…muita reposição que dá…dá cabo das equipas. Portanto, o que vende mais em volume, põem-se em mais espaço. É o caso do leite, da água e do papel higiénico.

ENTREVISTADOR: Ok

ENTREVISTADO: Portanto, Continente, Pingo Doce e Lidl são as três insígnias que estão no pódio do mercado geral, e forçosamente, do leite. Nós estamos em quarto lugar. Embora seja verdade que somos muito fortes nas grandes áreas metropolitanas, nas metrópoles Lisboa ou Porto – aí, sim! Somo muito fortes – mas a nível nacional, como digo, estamos em quarto lugar. O Lidl está em terceiro.

ENTREVISTADOR: Ok… Pronto! Acho que é tudo…

ENTREVISTADO: Quer os dados do mercado?

ENTREVISTADOR: Sim, se me desse eu agradecia (risos). Muito obrigada pela sua disponibilidade e por todo o conhecimento transmitido.

ENTREVISTADO: De nada. Vamos então ver dos dados para eu lhe enviar. Se depois precisar de mais alguma coisa mande-me um email.

ENTREVISTADOR: Ok, obrigada!

Table 1.1 – Frequencies table: Number of observations in each Perceived Differentiation question, D1, D2, D3, by agreement level.

	D1		D2		D3	
	PRIVATE LABEL	NATIONAL BRAND	PRIVATE LABEL	NATIONAL BRAND	PRIVATE LABEL	NATIONAL BRAND
1 - Completely disagree	22	53	27	65	17	33
2 - Disagree	40	54	40	49	24	33
3 - Not agree, neither disagree	23	10	15	2	17	14
4 - Agree	31	9	30	9	41	35
5 - Completely agree	7	3	11	4	24	14
TOTAL	252		252		252	

Table 1.2 – Frequencies table: Number of observations in each Perceived Differentiation question, D1, D2, D3, by differentiation level (low, medium, high)

	D1		D2		D3	
DIFFERENTIATION LEVEL	PRIVATE LABEL	NATIONAL BRAND	PRIVATE LABEL	NATIONAL BRAND	PRIVATE LABEL	NATIONAL BRAND
High	62	107	67	114	41	66
Medium	23	10	15	2	17	14
Low	38	12	41	13	65	49
TOTAL	252		252		252	

Appendix C – Sample Characterization

Figure 1.1 - Distribution of Respondents according to Age group

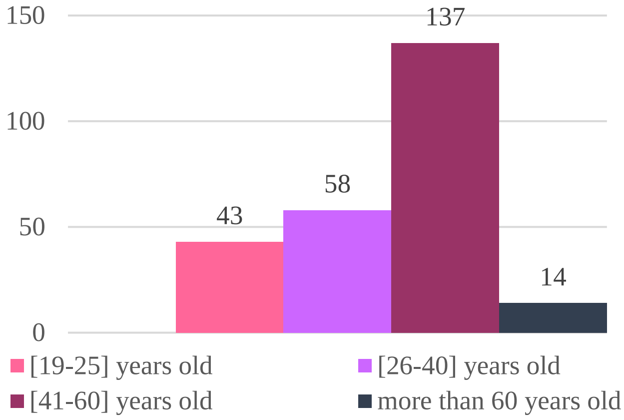


Figure 1.2 - Distribution of Respondents according to age group and type of brand consumed

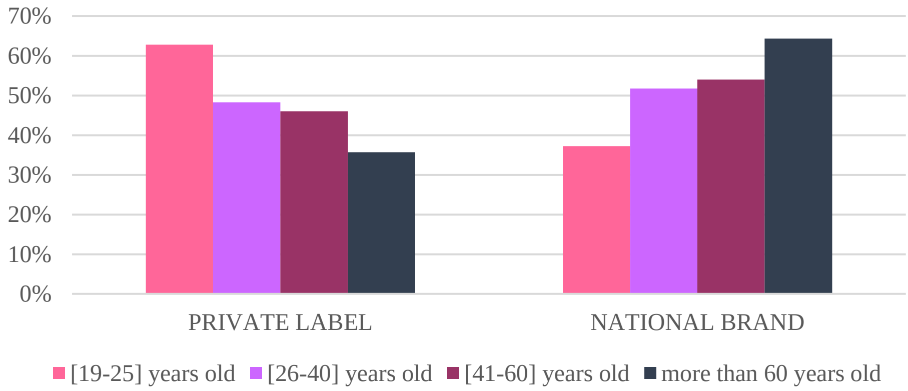


Figure 2.1 - Distribution of Respondents according to Gender

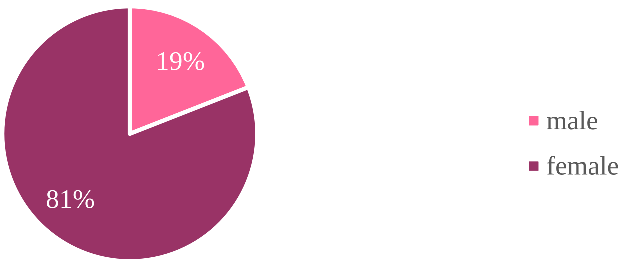


Figure 2.2 - Distribution of Respondents according to Gender and type of brand consumed

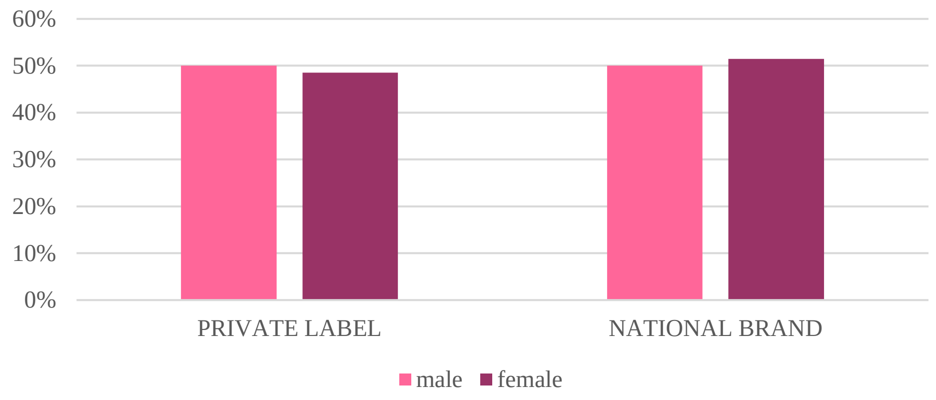


Figure 3.1 - Distribution of Respondents according to Number of people in household*

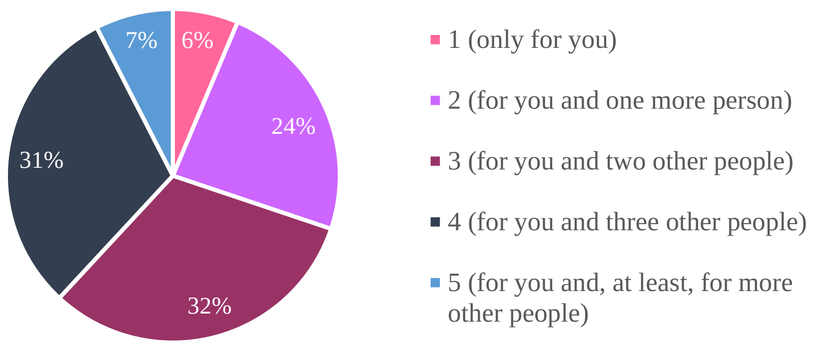
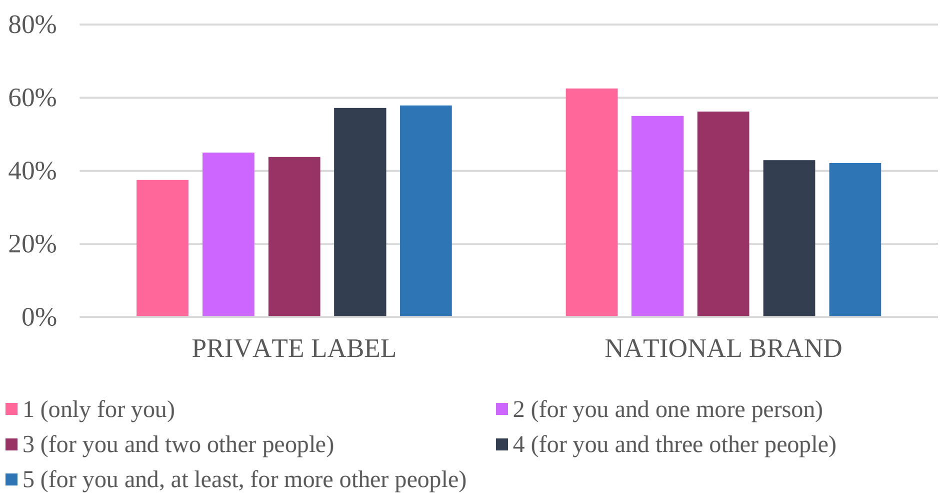


Figure 3.2 - Distribution of Respondents according to Number of people in household* and type of brand consumed



*number of people in household is used to describe number of people to whom the respondent shops

Figure 4.1 - Distribution of Respondents according to Presence ("Yes") or Absence ("No") of Food Constraints

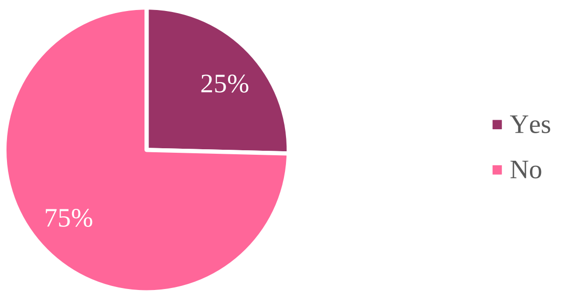


Figure 4.2 - Distribution of Respondents according to Presence ("Yes") or Absence ("No") of Food Constraints and type of brand consumed

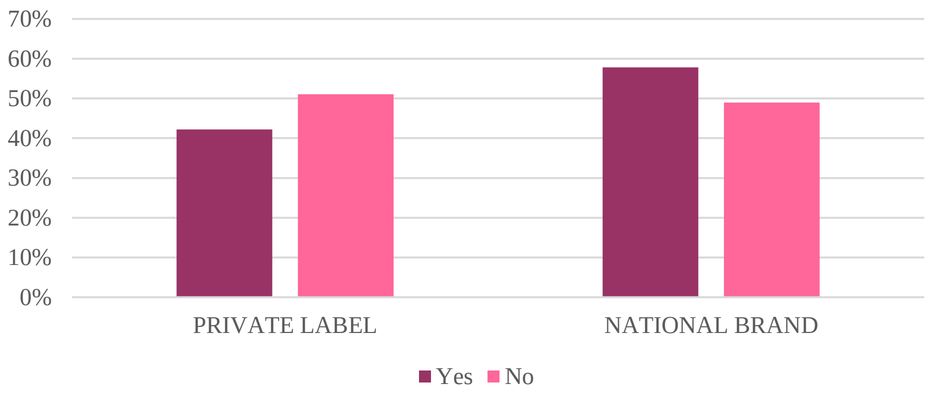


Figure 5.1 - Distribution of Respondents according to Responsibility ("Yes") or Not ("No") for Children

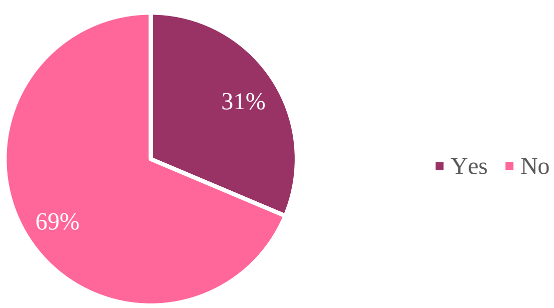


Figure 5.2 - Distribution of Respondents according to Responsibility ("Yes") or Not ("No") for Children and type of brand consumed

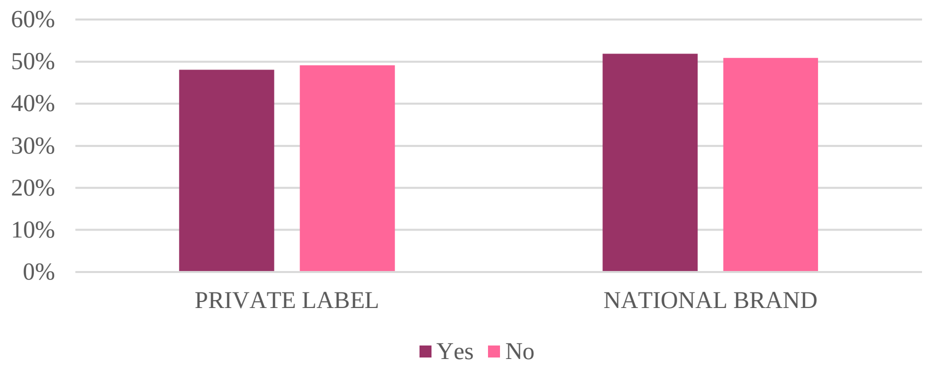


Figure 6.1 - Distribution of Respondents according to Monthly Income per capita

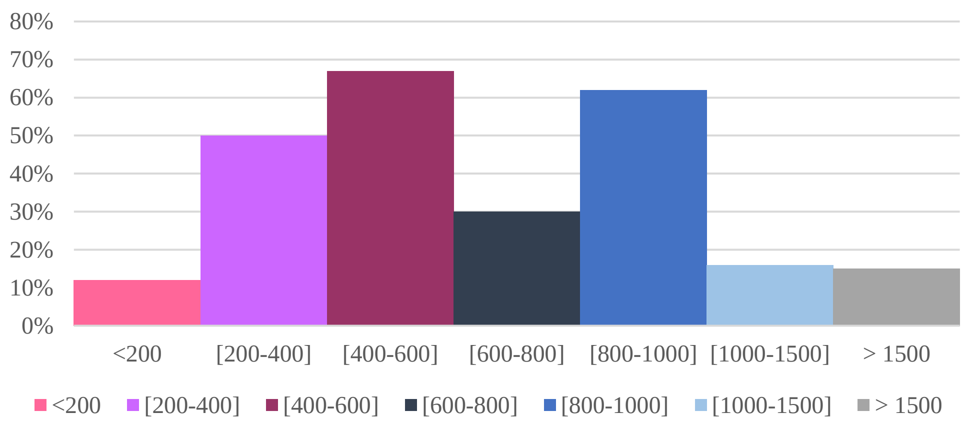


Figure 6.2 - Distribution of Respondents according to Monthly Income per capita and type of brand consumed

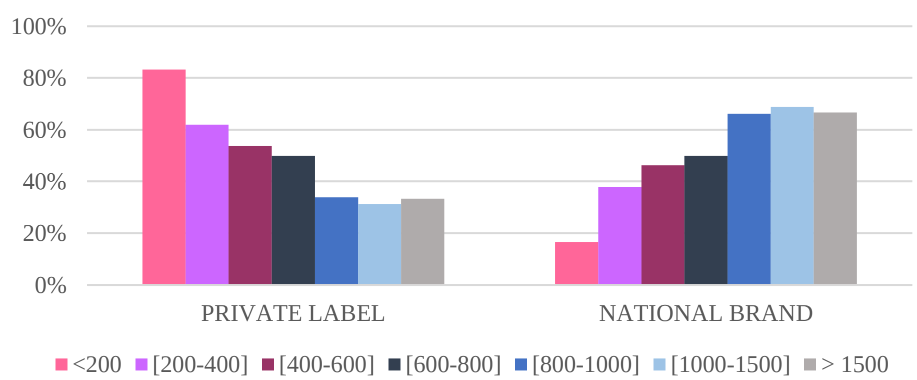


Figure 7.1 - Distribution of Respondents according to Frequency of Supermarket Purchase

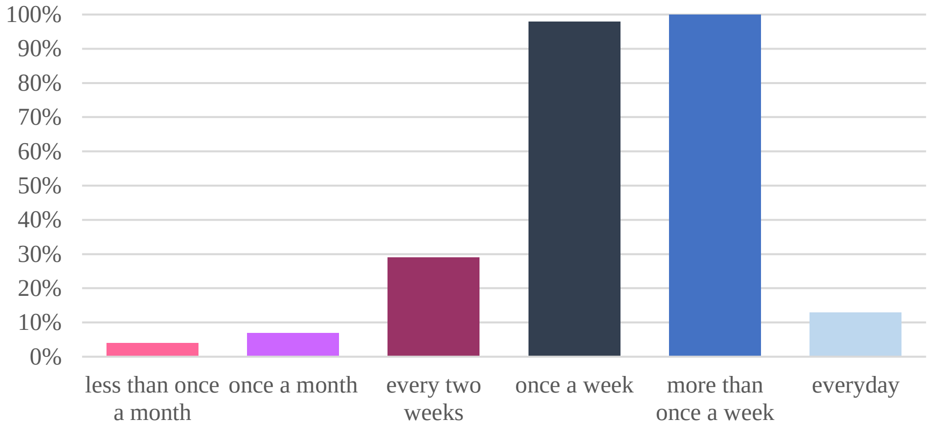


Figure 7.2 - Distribution of Respondents according to Frequency of Supermarket Purchase and type of brand consumed

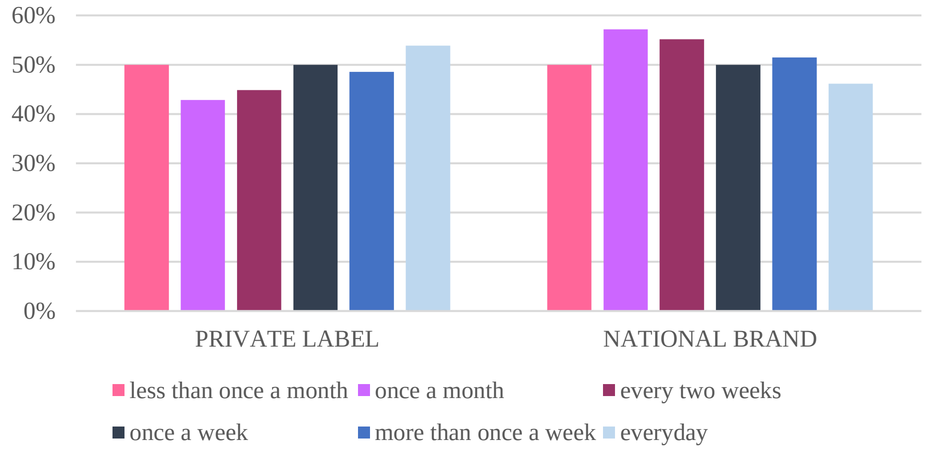


Figure 8.1 - Distribution of Respondents according to Companionship when shopping

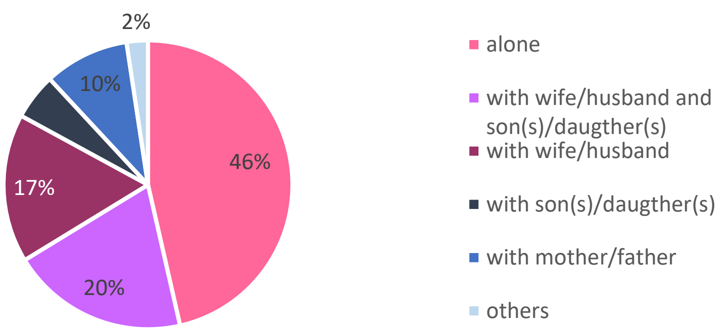


Figure 8.2 - Distribution of Respondents according to Companionship when shopping and type of brand consumed

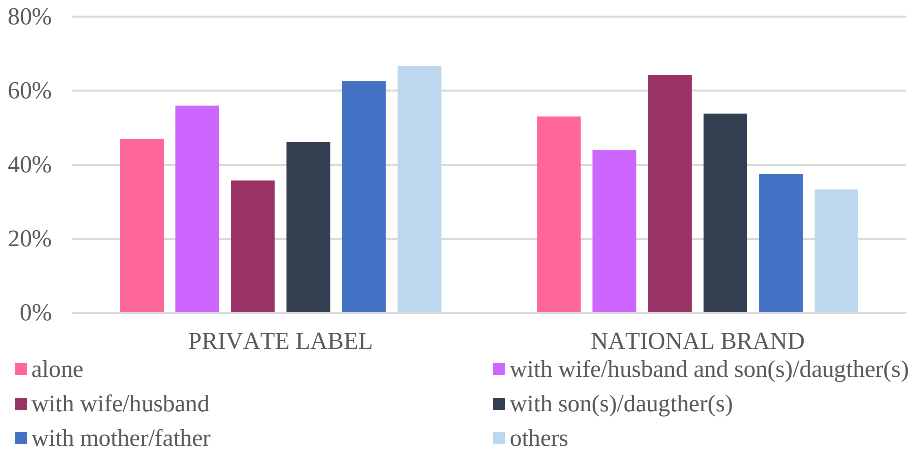


Figure 9.1 - Distribution of Respondents according to Quantity of Milk Pallets (1 pallet=6x1L) bought per month

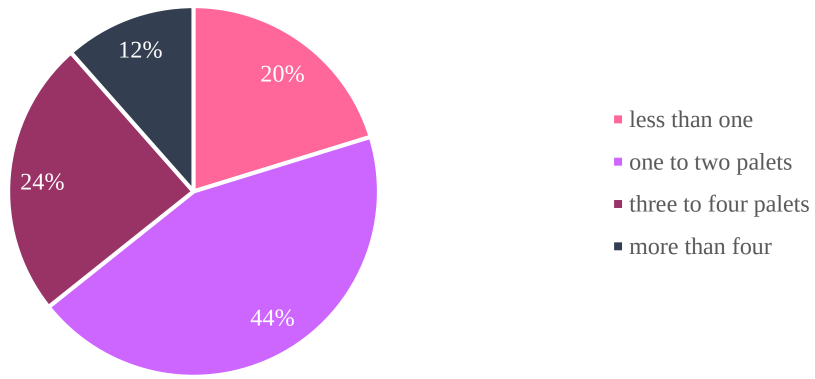
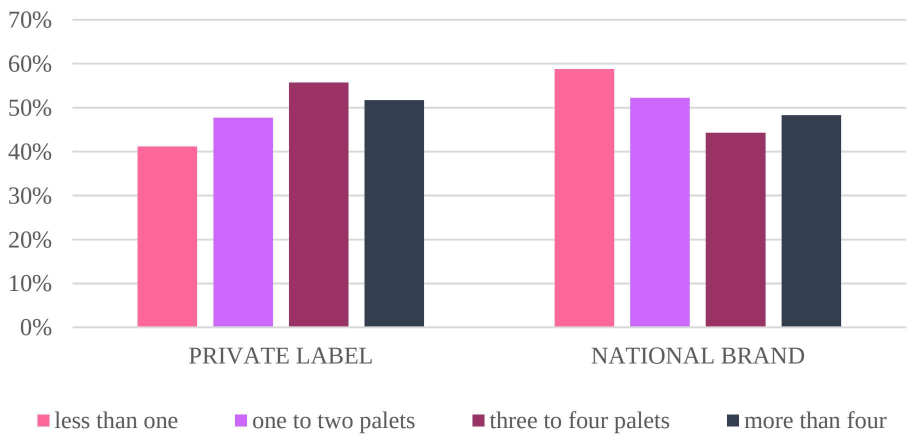


Figure 9.2 - Distribution of Respondents according to Quantity of Milk Pallets (1 pallet=6x1L) bought per month and type of brand consumed



Appendix D – Inference/Chi-squared tests

Table 1.1 – Observed frequencies table: Age and type of brand consumed

AGE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
less than 25 years old	27	16	43
[26-40] years old	28	30	58
[41-60] years old	63	74	137
more than 60 years old	5	9	14
TOTAL	123	129	252

Table 1.2 – Expected frequencies table: Age and type of brand consumed

AGE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
less than 25 years old	20,99	22,01	43
[26-40] years old	28,31	29,69	58
[41-60] years old	66,87	70,13	137
more than 60 years old	6,83	7,17	14
TOTAL	123	129	252

Table 1.3 – Q-test and p-value: Age and type of brand consumed

AGE	PRIVATE LABEL	NATIONAL BRAND
less than 25 years old	1,72	1,64
[26-40] years old	0,00	0,00
[41-60] years old	0,22	0,21
more than 60 years old	0,49	0,47
Q	**4,77**	
p-value	**2,90E-02**	

Table 2.1 – Observed frequencies table: Monthly Income per capita and type of brand consumed

MONTHLY INCOME PER CAPITA (€)	PRIVATE LABEL	NATIONAL BRAND	TOTAL
<200	10	2	12
[200-400]	31	19	50
[400-600]	36	31	67
[600-800]	15	15	30
[800-1000]	21	41	62
[1000-1500]	5	11	16
> 1500	5	10	15
TOTAL	123	129	252

Table 2.2 – Expected frequencies table: Monthly Income per capita and type of brand consumed

MONTHLY INCOME PER CAPITA (€)	PRIVATE LABEL	NATIONAL BRAND	TOTAL
<200	5,86	6,14	12
[200-400]	24,40	25,60	50
[400-600]	32,70	34,30	67
[600-800]	14,64	15,36	30
[800-1000]	30,26	31,74	62
[1000-1500]	7,81	8,19	16
> 1500	7,32	7,68	15
TOTAL	123	129	252

Table 2.3 – Q-test and p-value: Monthly Income per capita and type of brand consumed

MONTHLY INCOME PER CAPITA (€)	PRIVATE LABEL	NATIONAL BRAND
<200	2,93	2,79
[200-400]	1,78	1,70
[400-600]	0,33	0,32
[600-800]	0,01	0,01
[800-1000]	2,83	2,70
[1000-1500]	1,01	0,96
> 1500	0,74	0,70
Q	**18,82**	
p-value	**1,43E-05**	

Table 3.1 – Observed frequencies table: Gender and type of brand consumed

GENDER	PRIVATE LABEL	NATIONAL BRAND	TOTAL
Male	24	24	48
Female	99	105	204
TOTAL	123	129	252

Table 3.2 – Expected frequencies table: Gender and type of brand consumed

GENDER	PRIVATE LABEL	NATIONAL BRAND	TOTAL
male	23,43	24,57	48
female	99,57	104,43	204
TOTAL	123	129	

Table 3.3 – Q-test and p-value: Gender and type of brand consumed

GENDER	PRIVATE LABEL	NATIONAL BRAND
male	0,014	0,013
female	0,003	0,003
Q	**0,03**	
p-value	**8,54E-01**	

Table 4.1 – Observed frequencies table: Number of people in household and type of brand consumed

HOUSEHOLD	PRIVATE LABEL	NATIONAL BRAND	TOTAL
1 (only for you)	6	10	16
2 (for you and one more person)	27	33	60
3 (for you and two other people)	35	45	80
4 (for you and three other people)	44	33	77
5 (for you and, at least, for more other people)	11	8	19
TOTAL	123	129	252

Table 4.2 – Expected frequencies table: Number of people in household and type of brand consumed

HOUSEHOLD	PRIVATE LABEL	NATIONAL BRAND	TOTAL
1 (only for you)	7,81	8,19	16
2 (for you and one more person)	29,29	30,71	60
3 (for you and two other people)	39,05	40,95	80
4 (for you and three other people)	37,58	39,42	77
5 (for you and, at least, for more other people)	9,27	9,73	19
TOTAL	123	129	252

Table 4.3 – Q-test and p-value: Number of people in household and type of brand consumed

HOUSEHOLD	PRIVATE LABEL	NATIONAL BRAND
1 (only for you)	0,42	0,40
2 (for you and one more person)	0,18	0,17
3 (for you and two other people)	0,42	0,40
4 (for you and three other people)	1,10	1,04
5 (for you and, at least, for more other people)	0,32	0,31
Q	**4,75**	
p-value	**2,92E-02**	

Table 5.1 – Observed frequencies table: Health Constraints and type of brand consumed

HEALTH CONSTRAINT	PRIVATE LABEL	NATIONAL BRAND	TOTAL
yes	27	37	64
no	96	92	188
TOTAL	123	129	252

Table 5.2 – Expected frequencies table: Health Constraints and type of brand consumed

HEALTH CONSTRAINT	PRIVATE LABEL	NATIONAL BRAND	TOTAL
yes	31,24	32,76	48
no	91,76	96,24	204
TOTAL	123	129	

Table 5.3 – Q-test and p-value: Health Constraints and type of brand consumed

HEALTH CONSTRAINT	PRIVATE LABEL	NATIONAL BRAND
yes	0,57	0,55
no	0,20	0,19
Q	**1,51**	
p-value	**2,20E-01**	

Table 6.1 – Observed frequencies table: Responsibility for Children and type of brand consumed

RESPONSABILITY FOR CHILDREN	PRIVATE LABEL	NATIONAL BRAND	TOTAL
yes	38	41	79
no	85	88	173
TOTAL	123	129	252

Table 6.2 – Expected frequencies table: Responsibility for Children and type of brand consumed

RESPONSABILITY FOR CHILDREN	PRIVATE LABEL	NATIONAL BRAND	TOTAL
yes	38,56	40,44	79
no	84,44	88,56	173
TOTAL	123	129	252

Table 6.3 – Q-test and p-value: Responsibility for Children and type of brand consumed

RESPONSABILITY FOR CHILDREN	PRIVATE LABEL	NATIONAL BRAND
yes	0,008	0,008
no	0,004	0,004
Q	**0,02**	
p-value	**8,79E-01**	

Table 7.1 – Observed frequencies table: Shopping Frequency and type of brand consumed

SHOPPING FREQUENCY	PRIVATE LABEL	NATIONAL BRAND	TOTAL
less than once a month	2	2	4
once a month	3	4	7
every two weeks	13	16	29
once a wekk	49	49	98
more than once a week	49	52	101
everyday	7	6	13
TOTAL	123	129	252

Table 7.2 – Expected frequencies table: Shopping Frequency and type of brand consumed

SHOPPING FREQUENCY	PRIVATE LABEL	NATIONAL BRAND	TOTAL
less than once a month	1,95	2,05	4
once a month	3,42	3,58	7
every two weeks	14,15	14,85	29
once a wekk	47,83	50,17	98
more than once a week	49,30	51,70	101
everyday	6,35	6,65	13
TOTAL	123	129	252

Table 7.3 – Q-test and p-value: Shopping Frequency and type of brand consumed

SHOPPING FREQUENCY	PRIVATE LABEL	NATIONAL BRAND
less than once a month	0,001	0,001
once a month	0,051	0,048
every two weeks	0,094	0,090
once a wekk	0,028	0,027
more than once a week	0,002	0,002
everyday	0,068	0,064
less than once a month	0,001	0,001
Q	**0,48**	
p-value	**4,90E-01**	

Table 8.1 – Observed frequencies table: Companionship and type of brand consumed

COMPANIONSHIP	PRIVATE LABEL	NATIONAL BRAND	TOTAL
alone	55	62	117
with someone else	68	67	135
TOTAL	123	129	252

Table 8.2 – Expected frequencies table: Companionship and type of brand consumed

COMPANIONSHIP	PRIVATE LABEL	NATIONAL BRAND	TOTAL
alone	57,11	59,89	117
with someone else	65,89	69,11	491
TOTAL	123	129	608

Table 8.3 – Q-test and p-value: Companionship and type of brand consumed

COMPANIONSHIP	PRIVATE LABEL	NATIONAL BRAND
alone	0,08	0,07
with someone else	0,07	0,06
Q	**0,28**	
p-value	**5,94E-01**	

Table 9.1 – Observed frequencies table: Volume bought and type of brand consumed

VOLUME BOUGHT	PRIVATE LABEL	NATIONAL BRAND	TOTAL
less than one	21	30	51
one to two pallets	53	58	111
three to four pallets	34	27	61
more than four	15	14	29
TOTAL	123	129	252

Table 9.2 – Expected frequencies table: Volume bought and type of brand consumed

VOLUME BOUGHT	PRIVATE LABEL	NATIONAL BRAND	TOTAL
less than one	24,89	26,11	51
one to two pallets	54,18	56,82	111
three to four pallets	29,77	31,23	61
more than four	14,15	14,85	29
TOTAL	123	129	252

Table 9.3 – Q-test and p-value: Volume bought and type of brand consumed

VOLUME BOUGHT	PRIVATE LABEL	NATIONAL BRAND
less than one	0,61	0,58
one to two pallets	0,03	0,02
three to four pallets	0,60	0,57
more than four	0,05	0,05
Q	**2,51**	
p-value	**1,13E-01**	

Table 10.1 – Observed frequencies table: Degree of importance of Brand and type of brand consumed

BRAND IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	68	30	98
important	38	50	88
very or extremely important	17	49	66
TOTAL	123	129	252

Table 10.2 – Expected frequencies table: Degree of importance of Brand and type of brand consumed

BRAND IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	47,83	50,17	98
important	42,95	45,05	88
very or extremely important	32,21	33,79	66
TOTAL	123	129	252

Table 10.3 – Q-test and p-value: Degree of importance of Brand and type of brand consumed

BRAND IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	8,50	8,11
important	0,57	0,54
very or extremely important	7,19	6,85
Q	**31,76**	
p-value	**1,74E-08**	

Table 11.1 – Observed frequencies table: Degree of importance of Flavour and type of brand consumed

FLAVOUR IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	12	11	23
important	37	24	61
very or extremely important	74	94	168
TOTAL	123	129	252

Table 11.2 – Expected frequencies table: Degree of importance of Flavour and type of brand consumed

FLAVOUR IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	11,23	11,77	23
important	29,77	31,23	61
very or extremely important	82,00	86,00	168
TOTAL	123	129	252

Table 11.3 – Q-test and p-value: Degree of importance of Flavour and type of brand consumed

FLAVOUR IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	**0,05**	**0,05**
important	**1,75**	**1,67**
very or extremely important	**0,78**	**0,74**
Q	**5,05**	
p-value	**2,46E-02**	

Table 12.1 – Observed frequencies table: Degree of importance of Price and type of brand consumed

PRICE IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	7	21	28
important	36	63	99
very or extremely important	80	45	125
TOTAL	123	129	252

Table 12.2 – Expected frequencies table: Degree of importance of Price and type of brand consumed

PRICE IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	13,67	14,33	28
important	48,32	50,68	99
very or extremely important	61,01	63,99	125
TOTAL	123	129	252

Table 12.3 – Q-test and p-value: Degree of importance of Price and type of brand consumed

PRICE IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	3,25	3,10
important	3,14	3,00
very or extremely important	5,91	5,63
Q	**24,03**	
p-value	**9,46E-07**	

Table 13.1 – Observed frequencies table: Degree of importance of Price-Quality Ratio and type of brand consumed

PRICE-QUALITY RATIO IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	5	12	17
important	34	48	82
very or extremely important	84	69	153
TOTAL	123	129	252

Table 13.2 – Expected frequencies table: Degree of importance of Price-Quality Ratio and type of brand consumed

PRICE-QUALITY RATIO IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	8,30	8,70	17
important	40,02	41,98	82
very or extremely important	74,68	78,32	153
TOTAL	123	129	252

Table 13.3 – Q-test and p-value: Degree of importance of Price-Quality Ratio and type of brand consumed

PRICE-QUALITY RATIO IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	1,31	1,25
important	0,91	0,86
very or extremely important	1,16	1,11
Q	**6,60**	
p-value	**1,02E-02**	

Table 14.1 – Observed frequencies table: Degree of importance of Discounts and type of brand consumed

DISCOUNTS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	16	39	55
Importante	36	43	79
very or extremely important	71	47	118
TOTAL	123	129	252

Table 14.2 – Expected frequencies table: Degree of importance of Discounts and type of brand consumed

DISCOUNTS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	26,85	28,15	55
important	38,56	40,44	79
very or extremely important	57,60	60,40	118
TOTAL	123	129	252

Table 14.3 – Q-test and p-value: Degree of importance of Discounts and type of brand consumed

DISCOUNTS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	4,38	4,18
important	0,17	0,16
very or extremely important	3,12	2,97
Q	**14,99**	
p-value	**1,08E-04**	

Table 15.1 – Observed frequencies table: Degree of importance of Ethic Concerns and type of brand consumed

ETHIC CONCERNS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	45	43	88
Importante	49	41	90
very or extremely important	29	45	74
TOTAL	123	129	252

Table 15.2 – Expected frequencies table: Degree of importance of Ethic Concerns and type of brand consumed

ETHIC CONCERNS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	42,95	45,05	88
important	43,93	46,07	90
very or extremely important	36,12	37,88	74
TOTAL	123	129	252

Table 15.3 – Q-test and p-value: Degree of importance of Ethic Concerns and type of brand consumed

ETHIC CONCERNS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	0,10	0,09
important	0,59	0,56
very or extremely important	1,40	1,34
Q	**4,08**	
p-value	**4,35E-02**	

Table 16.1 – Observed frequencies table: Degree of importance of Advertisement and type of brand consumed

ADVERTISEMENT IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	89	105	194
Importante	17	13	30
very or extremely important	17	11	28
TOTAL	123	129	252

Table 16.2 – Expected frequencies table: Degree of importance of Advertisement and type of brand consumed

ADVERTISEMENT IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	94,69	99,31	194
important	14,64	15,36	30
very or extremely important	13,67	14,33	28
TOTAL	123	129	252

Table 16.3 – Q-test and p-value: Degree of importance of Advertisement and type of brand consumed

ADVERTISEMENT IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	0,34	0,33
important	0,38	0,36
very or extremely important	0,81	0,78
Q	**3,00**	
p-value	**8,34E-02**	

Table 17.1 – Observed frequencies table: Degree of importance of Product Design and type of brand consumed

PRODUCT DESIGN IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	94	93	187
Importante	20	27	47
very or extremely important	9	9	18
TOTAL	123	129	252

Table 17.2 – Expected frequencies table: Degree of importance of Product Design and type of brand consumed

PRODUCT DESIGN IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	91,27	95,73	187
important	22,94	24,06	47
very or extremely important	8,79	9,21	18
TOTAL	123	129	252

Table 17.3 – Q-test and p-value: Degree of importance of Product Design and type of brand consumed

PRODUCT DESIGN IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	0,08	0,08
important	0,38	0,36
very or extremely important	0,01	0,00
Q	**0,91**	
p-value	**3,41E-01**	

Table 18.1 – Observed frequencies table: Degree of importance of Health Concerns and type of brand consumed

HEALTH CONCERNS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	35	31	66
Importante	27	31	58
very or extremely important	61	67	128
TOTAL	123	129	252

Table 18.2 – Expected frequencies table: Degree of importance of Health Concerns and type of brand consumed

HEALTH CONCERNS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND	TOTAL
not very important or not important at all	32,21	33,79	66
important	28,31	29,69	58
very or extremely important	62,48	65,52	128
TOTAL	123	129	252

Table 18.3 – Q-test and p-value: Degree of importance of Health Concerns and type of brand consumed

HEALTH CONCERNS IMPORTANCE	PRIVATE LABEL	NATIONAL BRAND
not very important or not important at all	0,24	0,23
important	0,06	0,06
very or extremely important	0,03	0,03
Q	**0,66**	
p-value	**4,18E-01**	

Figure 1 – Most Important general product attributes by type of milk brand purchased

Table 19.1 – Observed frequencies table: Perceived Differentiation and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	170,00	287,00	457,00
Medium	55,00	26,00	81,00
Low	144,00	74,00	218,00
SUM	369,00	387,00	756,00

Table 19.2 – Expected frequencies table: Perceived Differentiation and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	223,06	233,94	457,00
Medium	39,54	41,46	81,00
Low	106,40	111,60	218,00
SUM	369,00	387,00	756,00

Table 19.3 – Q-test and p-value: Perceived Differentiation and type of brand consumed

PERCEIVED DIFFERENTIATION	PRIVATE LABEL	NATIONAL BRAND
High	12,62	12,03
Medium	6,05	5,77
Low	13,28	12,67
Q	**62,42**	
p-value	**2,77E-15**	

Table 20.1 – Observed frequencies table: Brand Equity and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	202,00	285,00	487,00
Medium	100,00	143,00	243,00
Low	190,00	88,00	278,00
SUM	492,00	516,00	1008,00

Table 20.2 – Expected frequencies table: Brand Equity and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	237,70	249,30	487,00
Medium	118,61	124,39	243,00
Low	135,69	142,31	278,00
SUM	492,00	516,00	1008,00

Table 20.3 – Q-test and p-value: Brand Equity and type of brand consumed

BRAND EQUITY	PRIVATE LABEL	NATIONAL BRAND
High	5,36	5,11
Medium	2,92	2,78
Low	21,74	20,73
Q	**58,64**	
p-value	**1,89E-14**	

Table 21.1 – Observed frequencies table: Brand Loyalty and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	140,00	223,00	363,00
Medium	105,00	130,00	235,00
Low	247,00	163,00	410,00
SUM	492,00	516,00	1008,00

Table 21.2 – Expected frequencies table: Brand Loyalty and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	177,18	185,82	363,00
Medium	114,70	120,30	235,00
Low	200,12	209,88	410,00
SUM	492,00	516,00	1008,00

Table 21.3 – Q-test and p-value: Brand Loyalty and type of brand consumed

BRAND LOYALTY	PRIVATE LABEL	NATIONAL BRAND
High	7,80	7,44
Medium	0,82	0,78
Low	10,98	10,47
Q	**38,30**	
p-value	**6,07E-10**	

Table 22.1 – Observed frequencies table: Price Consciousness and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	147,00	80,00	227,00
Medium	67,00	74,00	141,00
Low	155,00	233,00	388,00
SUM	369,00	387,00	756,00

Table 22.2 – Expected frequencies table: Price Consciousness and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	110,80	116,20	227,00
Medium	68,82	72,18	141,00
Low	189,38	198,62	388,00
SUM	369,00	387,00	756,00

Table 22.3 – Q-test and p-value: Price Consciousness and type of brand consumed

PRICE CONSCIOUSNESS	PRIVATE LABEL	NATIONAL BRAND
High	11,83	11,28
Medium	0,05	0,05
Low	6,24	5,95
Q	**35,39**	
p-value	**2,69E-09**	

Table 23.1 – Observed frequencies table: Value Consciousness and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	350,00	304,00	654,00
Medium	77,00	78,00	155,00
Low	65,00	134,00	199,00
SUM	492,00	516,00	1008,00

Table 23.2 – Expected frequencies table: Value Consciousness and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
High	319,21	334,79	654,00
Medium	75,65	79,35	155,00
Low	97,13	101,87	199,00
SUM	492,00	516,00	1008,00

Table 23.3 – Q-test and p-value: Value Consciousness and type of brand consumed

VALUE CONSCIOUSNESS	PRIVATE LABEL	NATIONAL BRAND
High	2,97	2,83
Medium	0,02	0,02
Low	10,63	10,13
Q	**26,61**	
p-value	**2,49E-07**	

Table 24.1 – Observed frequencies table: Overall Perception of Private Labels and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
Positive	236,00	184,00	420,00
Neutral	248,00	277,00	525,00
Negative	254,00	313,00	567,00
SUM	738,00	774,00	1512,00

Table 24.2 – Expected frequencies table: Overall Perception of Private Labels and type of brand consumed

	PRIVATE LABEL	NATIONAL BRAND	SUM
Positive	205,00	215,00	420,00
Neutral	256,25	268,75	525,00
Negative	276,75	290,25	567,00
SUM	738,00	774,00	1512,00

Table 24.3 – Q-test and p-value: Overall Perception of Private Labels and type of brand consumed

PERCEPTION OF PRIVATE LABELS	PRIVATE LABEL	NATIONAL BRAND
Positive	4,69	4,47
Neutral	0,27	0,25
Negative	1,87	1,78
Q	**13,33**	
p-value	**2,61E-04**	

Table 25.1 – Observed frequencies table: Perceived Differentiation (D) and Brand Equity (BE)

	High D	Medium D	Low D	SUM
High BE	380,00	19,00	88,00	487,00
Medium BE	171,00	18,00	54,00	243,00
Low BE	153,00	15,00	110,00	278,00
SUM	704,00	52,00	252,00	1008,00

Table 25.2 – Expected frequencies table: Perceived Differentiation (D) and Brand Equity (BE)

	High D	Medium D	Low D	SUM
High BE	340,13	25,12	121,75	487,00
Medium BE	169,71	12,54	60,75	243,00
Low BE	194,16	14,34	69,50	278,00
SUM	340,13	25,12	121,75	1008,00

Table 25.3 – Q-test and p-value: Perceived Differentiation (D) and Brand Equity (BE)

	High D	Medium D	Low D
High BE	4,67	1,49	9,36
Medium BE	0,01	2,38	0,75
Low BE	8,73	0,03	23,60
Q	**51,02**		
p-value	**9,14E-13**		

Table 26.1 – Observed frequencies table: Perceived Differentiation (D) and Brand Loyalty (BL)

	High BL	Medium BL	Low BL	SUM
High D	286,00	47,00	124,00	457,00
Medium D	32,00	15,00	34,00	81,00
Low D	63,00	16,00	139,00	218,00
SUM	381,00	78,00	297,00	756,00

Table 26.2 – Expected frequencies table: Perceived Differentiation (D) and Brand Loyalty (BL)

	High BL	Medium BL	Low BL	SUM
High D	230,31	47,15	179,54	457,00
Medium D	40,82	8,36	31,82	81,00
Low D	109,87	22,49	85,64	218,00
SUM	381,00	78,00	297,00	756,00

Table 26.3 – Q-test and p-value: Perceived Differentiation (D) and Brand Loyalty (BL)

	High BL	Medium BL	Low BL
High D	13,46	0,00	17,18
Medium D	1,91	5,28	0,15
Low D	19,99	1,87	33,24
Q	**93,09**		
p-value	**5,01E-22**		

Table 27.1 – Observed frequencies table: Perceived Differentiation (D) and Price Consciousness (PC)

	High PC	Medium PC	Low PC	SUM
High D	133,00	12,00	82,00	227,00
Medium D	85,00	10,00	46,00	141,00
Low D	310,00	17,00	61,00	388,00
SUM	528,00	39,00	189,00	756,00

Table 27.2 – Expected frequencies table: Perceived Differentiation (D) and Price Consciousness (PC)

	High PC	Medium PC	Low PC	SUM
High D	158,54	11,71	56,75	227,00
Medium D	98,48	7,27	35,25	141,00
Low D	270,98	20,02	97,00	388,00
SUM	528,00	39,00	567,00	756,00

Table 27.3 – Q-test and p-value: Perceived Differentiation (D) and Price Consciousness (PC)

	High PC	Medium PC	Low PC
High D	4,11	0,01	11,23
Medium D	1,84	1,02	3,28
Low D	5,62	0,45	13,36
Q	**40,93**		
p-value	**1,58E-10**		

Table 28.1 – Observed frequencies table: Perceived Differentiation (D) and Value Consciousness (VC)

	High VC	Medium VC	Low VC	SUM
High D	299,00	49,00	109,00	457,00
Medium D	61,00	12,00	8,00	81,00
Low D	180,00	17,00	21,00	218,00
SUM	540,00	78,00	138,00	756,00

Table 28.2 – Expected frequencies table: Perceived Differentiation (D) and Value Consciousness (VC)

	High VC	Medium VC	Low VC	SUM
High D	326,43	47,15	83,42	457,00
Medium D	57,86	8,36	14,79	81,00
Low D	155,71	22,49	39,79	218,00
SUM	540,00	78,00	618,00	756,00

Table 28.3 – Q-test and p-value: Perceived Differentiation (D) and Value Consciousness (VC)

	High VC	Medium VC	Low VC
High D	2,30	0,07	7,84
Medium D	0,17	1,59	3,11
Low D	3,79	1,34	8,88
Q	**29,10**		
p-value	**6,88E-08**		

Table 29.1 – Observed frequencies table: Perceived Differentiation (D) and Overall Perception of Private Labels (PPL)

	High D	Medium D	Low D	SUM
Positive PPL	284,00	22,00	114,00	420,00
Neutral PPL	350,00	36,00	139,00	525,00
Negative PPL	422,00	20,00	125,00	567,00
SUM	1056,00	78,00	378,00	1512,00

Table 29.2 – Expected frequencies table: Perceived Differentiation (D) and Overall Perception of Private Labels (PPL)

	High D	Medium D	Low D	SUM
Positive PPL	293,33	21,67	105,00	420,00
Neutral PPL	366,67	27,08	131,25	525,00
Negative PPL	396,00	29,25	141,75	567,00
SUM	1056,00	78,00	1134,00	1512,00

Table 29.3 – Q-test and p-value: Perceived Differentiation (D) and Overall Perception of Private Labels (PPL)

	High D	Medium D	Low D
Positive PPL	0,30	0,01	0,77
Neutral PPL	0,76	2,94	0,46
Negative PPL	1,71	2,93	1,98
Q	**11,84**		
p-value	**5,81E-04**		

Table 30.1 – Observed frequencies table: Brand Equity (BE) and Brand Loyalty (BL)

	High BL	Medium BL	Low BL	SUM
High BE	316,00	46,00	125,00	487,00
Medium BE	118,00	33,00	92,00	243,00
Low BE	74,00	25,00	179,00	278,00
SUM	508,00	104,00	396,00	1008,00

Table 30.2 – Expected frequencies table: Brand Equity (BE) and Brand Loyalty (BL)

	High BL	Medium BL	Low BL	SUM
High BE	245,43	50,25	191,32	487,00
Medium BE	122,46	25,07	95,46	243,00
Low BE	140,10	28,68	109,21	278,00
SUM	508,00	104,00	612,00	1008,00

Table 30.3 – Q-test and p-value: Brand Equity (BE) and Brand Loyalty (BL)

	High BL	Medium BL	Low BL
High BE	20,29	0,36	22,99
Medium BE	0,16	2,51	0,13
Low BE	31,19	0,47	44,59
Q	**122,69**		
p-value	**1,63E-28**		

Table 31.1 – Observed frequencies table: Brand Equity (BE) and Price Consciousness (PC)

	High BE	Medium BE	Low BE	SUM
High PC	116,00	36,00	75,00	227,00
Medium PC	80,00	21,00	40,00	141,00
Low PC	257,00	39,00	92,00	388,00
SUM	453,00	96,00	207,00	756,00

Table 31.2 – Expected frequencies table: Brand Equity (BE) and Price Consciousness (PC)

	High BE	Medium BE	Low BE	SUM
High PC	136,02	28,83	62,15	227,00
Medium PC	84,49	17,90	38,61	141,00
Low PC	232,49	49,27	106,24	388,00
SUM	453,00	96,00	549,00	756,00

Table 31.3 – Q-test and p-value: Brand Equity (BE) and Price Consciousness (PC)

	High BE	Medium BE	Low BE
High PC	2,95	1,79	2,65
Medium PC	0,24	0,54	0,05
Low PC	2,58	2,14	1,91
Q	**14,84**		
p-value	**1,17E-04**		

Table 32.1 – Observed frequencies table: Brand Equity (BE) and Value Consciousness (VC)

	High VC	Medium VC	Low VC	SUM
High BE	338,00	49,00	100,00	487,00
Medium BE	175,00	26,00	42,00	243,00
Low BE	207,00	29,00	42,00	278,00
SUM	720,00	104,00	184,00	1008,00

Table 32.2 – Expected frequencies table: Brand Equity (BE) and Value Consciousness (VC)

	High VC	Medium VC	Low VC	SUM
High BE	347,86	50,25	88,90	487,00
Medium BE	173,57	25,07	44,36	243,00
Low BE	198,57	28,68	50,75	278,00
SUM	720,00	104,00	824,00	1008,00

Table 32.3 – Q-test and p-value: Brand Equity (BE) and Value Consciousness (VC)

	High VC	Medium VC	Low VC
High BE	0,28	0,03	1,39
Medium BE	0,01	0,03	0,13
Low BE	0,36	0,00	1,51
Q	**3,74**		
p-value	**5,32E-02**		

Table 33.1 – Observed frequencies table: Brand Equity (BE) and Overall Perception of Private Labels (PPL)

	High BE	Medium BE	Low BE	SUM
Positive PPL	256,00	43,00	121,00	420,00
Neutral PPL	287,00	104,00	134,00	525,00
Negative PPL	363,00	45,00	159,00	567,00
SUM	906,00	192,00	414,00	1512,00

Table 33.2 – Expected frequencies table: Brand Equity (BE) and Overall Perception of Private Labels (PPL)

	High BE	Medium BE	Low BE	SUM
Positive PPL	251,67	53,33	115,00	420,00
Neutral PPL	314,58	66,67	143,75	525,00
Negative PPL	339,75	72,00	155,25	567,00
SUM	906,00	192,00	1098,00	1512,00

Table 33.3 – Q-test and p-value: Brand Equity (BE) and Overall Perception of Private Labels (PPL)

	High BE	Medium BE	Low BE
Positive PPL	0,07	2,00	0,31
Neutral PPL	2,42	20,91	0,66
Negative PPL	1,59	10,13	0,09
Q	**38,18**		
p-value	**6,44E-10**		

Table 34.1 – Observed frequencies table: Brand Loyalty (BL) and Price Consciousness (PC)

	High BL	Medium BL	Low BL	SUM
High PC	95,00	27,00	105,00	227,00
Medium PC	59,00	24,00	58,00	141,00
Low PC	227,00	27,00	134,00	388,00
SUM	381,00	78,00	297,00	756,00

Table 34.2 – Expected frequencies table: Brand Loyalty (BL) and Price Consciousness (PC)

	High BL	Medium BL	Low BL	SUM
High PC	114,40	23,42	89,18	227,00
Medium PC	71,06	14,55	55,39	141,00
Low PC	195,54	40,03	152,43	388,00
SUM	381,00	78,00	459,00	756,00

Table 34.3 – Q-test and p-value: Brand Loyalty (BL) and Price Consciousness (PC)

	High BL	Medium BL	Low BL
High PC	3,29	0,55	2,81
Medium PC	2,05	6,14	0,12
Low PC	5,06	4,24	2,23
Q	**26,49**		
p-value	**2,65E-07**		

Table 35.1 – Observed frequencies table: Brand Loyalty (BL) and Value Consciousness (VC)

	High VC	Medium VC	Low VC	SUM
High BL	279,00	46,00	106,00	431,00
Medium BL	167,00	24,00	19,00	210,00
Low BL	274,00	34,00	59,00	367,00
SUM	720,00	104,00	184,00	1008,00

Table 35.2 – Expected frequencies table: Brand Loyalty (BL) and Value Consciousness (VC)

	High VC	Medium VC	Low VC	SUM
High BL	307,86	44,47	78,67	431,00
Medium BL	150,00	21,67	38,33	210,00
Low BL	262,14	37,87	66,99	367,00
SUM	720,00	104,00	824,00	1008,00

Table 35.3 – Q-test and p-value: Brand Loyalty (BL) and Value Consciousness (VC)

	High VC	Medium VC	Low VC
High BL	2,70	0,05	9,49
Medium BL	1,93	0,25	9,75
Low BL	0,54	0,39	0,95
Q	**26,06**		
p-value	**3,31E-07**		

Table 36.1 – Observed frequencies table: Brand Loyalty (BL) and Overall Perception of Private Labels (PPL)

	High BL	Medium BL	Low BL	SUM
Positive PPL	224,00	40,00	156,00	420,00
Neutral PPL	260,00	71,00	194,00	525,00
Negative PPL	278,00	45,00	244,00	567,00
SUM	762,00	156,00	594,00	1512,00

Table 36.2 – Expected frequencies table: Brand Loyalty (BL) and Overall Perception of Private Labels (PPL)

	High BL	Medium BL	Low BL	SUM
Positive PPL	211,67	43,33	165,00	420,00
Neutral PPL	264,58	54,17	206,25	525,00
Negative PPL	285,75	58,50	222,75	567,00
SUM	762,00	156,00	918,00	1512,00

Table 36.3 – Q-test and p-value: Brand Loyalty (BL) and Overall Perception of Private Labels (PPL)

	High BL	Medium BL	Low BL
Positive PPL	0,72	0,26	0,49
Neutral PPL	0,08	5,23	0,73
Negative PPL	0,21	3,12	2,03
Q	**12,86**		
p-value	**3,36E-04**		

Table 37.1 – Observed frequencies table: Price Consciousness (PC) and Value Consciousness (VC)

	High VC	Medium VC	Low VC	SUM
High PC	185,00	20,00	22,00	227,00
Medium PC	111,00	16,00	14,00	141,00
Low PC	244,00	42,00	102,00	388,00
SUM	540,00	78,00	138,00	756,00

Table 37.2 – Expected frequencies table: Price Consciousness (PC) and Value Consciousness (VC)

	High VC	Medium VC	Low VC	
High PC	162,14	23,42	41,44	227,00
Medium PC	100,71	14,55	25,74	141,00
Low PC	277,14	40,03	70,83	388,00
	540,00	78,00	618,00	756,00

Table 37.3 – Q-test and p-value: Price Consciousness (PC) and Value Consciousness (VC)

	High VC	Medium VC	Low VC
High PC	3,22	0,50	9,12
Medium PC	1,05	0,15	5,35
Low PC	3,96	0,10	13,72
Q	**37,17**		
p-value	**1,08E-09**		

Table 38.1 – Observed frequencies table: Price Consciousness (PC) and Overall Perception of Private Labels (PPL)

	High PC	Medium PC	Low PC	SUM
High PPL	133,00	44,00	243,00	420,00
Medium PPL	148,00	90,00	287,00	525,00
Low PPL	127,00	64,00	376,00	567,00
SUM	408,00	198,00	906,00	1512,00

Table 38.2 – Expected frequencies table: Price Consciousness (PC) and Overall Perception of Private Labels (PPL)

	High PC	Medium PC	Low PC	SUM
Positive PPL	113,33	55,00	251,67	420,00
Neutral PPL	141,67	68,75	314,58	525,00
Negative PPL	153,00	74,25	339,75	567,00
SUM	408,00	198,00	606,00	1512,00

Table 38.3 – Q-test and p-value: Price Consciousness (PC) and Overall Perception of Private Labels (PPL)

	High PC	Medium PC	Low PC
Positive PPL	3,41	2,20	0,30
Neutral PPL	0,28	6,57	2,42
Negative PPL	4,42	1,41	3,87
Q	**24,88**		
p-value	**6,09E-07**		

Table 39.1 – Observed frequencies table: Value Consciousness (VC) and Overall Perception of Private Labels (PPL)

	High VC	Medium VC	Low VC	SUM
Positive PPL	313,00	36,00	71,00	420,00
Neutral PPL	428,00	48,00	49,00	525,00
Negative PPL	339,00	72,00	156,00	567,00
SUM	1080,00	156,00	276,00	1512,00

Table 39.2 – Expected frequencies table: Value Consciousness (VC) and Overall Perception of Private Labels (PPL)

	High VC	Medium VC	Low VC	SUM
Positive PPL	300,00	43,33	76,67	420,00
Neutral PPL	375,00	54,17	95,83	525,00
Negative PPL	405,00	58,50	103,50	567,00
SUM	408,00	198,00	606,00	1512,00

Table 39.3 – Q-test and p-value: Value Consciousness (VC) and Overall Perception of Private Labels (PPL)

	High VC	Medium VC	Low VC
Positive PPL	0,56	1,24	0,42
Neutral PPL	7,49	0,70	22,89
Negative PPL	10,76	3,12	26,63
Q	**73,80**		
p-value	**8,62E-18**		

Table 40.1 – Observed frequencies table: Age and Perceived Differentiation (D)

	< 25	[26-40]	[41-60]	> 60	SUM
High D	68,00	100,00	255,00	34,00	457,00
Medium D	19,00	21,00	39,00	2,00	81,00
Low D	42,00	53,00	117,00	6,00	218,00
SUM	129,00	174,00	411,00	42,00	756,00

Table 40.2 – Expected frequencies table: Age and Perceived Differentiation (D)

	< 25	[26-40]	[41-60]	> 60	SUM
High D	77,98	105,18	248,45	25,39	457,00
Medium D	13,82	18,64	44,04	4,50	81,00
Low D	37,20	50,17	118,52	12,11	218,00
SUM	129,00	174,00	411,00	42,00	756,00

Table 40.3 – Q-test and p-value: Age and Perceived Differentiation (D)

	< 25	[26-40]	[41-60]	> 60
High D	1,28	0,26	0,17	2,92
Medium D	1,94	0,30	0,58	1,39
Low D	0,62	0,16	0,02	3,08
Q	**12,71**			
p-value	**3,63E-04**			

Table 41.1 – Observed frequencies table: Age and Brand Equity (BE)

	< 25	[26-40]	[41-60]	> 60	SUM
High BE	78,00	114,00	260,00	35,00	487,00
Medium BE	50,00	56,00	126,00	11,00	243,00
Low BE	44,00	62,00	162,00	10,00	278,00
SUM	172,00	232,00	548,00	56,00	1008,00

Table 41.2 – Expected frequencies table: Age and Brand Equity (BE)

	< 25	[26-40]	[41-60]	> 60	SUM
High BE	83,10	112,09	264,76	27,06	487,00
Medium BE	41,46	55,93	132,11	13,50	243,00
Low BE	47,44	63,98	151,13	15,44	278,00
SUM	172,00	232,00	548,00	56,00	1008,00

Table 41.3 – Q-test and p-value: Age and Brand Equity (BE)

	< 25	[26-40]	[41-60]	> 60
High BE	0,31	0,03	0,09	2,33
Medium BE	1,76	0,00	0,28	0,46
Low BE	0,25	0,06	0,78	1,92
Q	**8,28**			
p-value	**4,01E-03**			

Table 42.1 – Observed frequencies table: Age and Brand Loyalty (BL)

	< 25	[26-40]	[41-60]	> 60	SUM
High BL	74,00	101,00	219,00	37,00	431,00
Medium BL	38,00	51,00	117,00	4,00	210,00
Low BL	60,00	80,00	212,00	15,00	367,00
SUM	172,00	232,00	548,00	56,00	1008,00

Table 42.2 – Expected frequencies table: Age and Brand Loyalty (BL)

	< 25	[26-40]	[41-60]	> 60	SUM
High BL	73,54	99,20	234,31	23,94	431,00
Medium BL	35,83	48,33	114,17	11,67	210,00
Low BL	62,62	84,47	199,52	20,39	367,00
SUM	172,00	232,00	548,00	56,00	1008,00

Table 42.3 – Q-test and p-value: Age and Brand Loyalty (BL)

	< 25	[26-40]	[41-60]	> 60
High BL	0,00	0,03	1,00	7,12
Medium BL	0,13	0,15	0,07	5,04
Low BL	0,11	0,24	0,78	1,42
Q	**16,09**			
p-value	**6,03E-05**			

Table 43.1 – Observed frequencies table: Age and Price Consciousness (PC)

	< 25	[26-40]	[41-60]	> 60	SUM
High PC	44,00	53,00	104,00	11,00	212,00
Medium PC	26,00	34,00	74,00	7,00	141,00
Low PC	59,00	87,00	233,00	24,00	403,00
SUM	129,00	174,00	411,00	42,00	756,00

Table 43.2 – Expected frequencies table: Age and Price Consciousness (PC)

	< 25	[26-40]	[41-60]	> 60	SUM
High PC	36,17	48,79	115,25	11,78	212,00
Medium PC	24,06	32,45	76,65	7,83	141,00
Low PC	68,77	92,75	219,09	22,39	403,00
SUM	129,00	174,00	411,00	42,00	756,00

Table 43.3 – Q-test and p-value: Age and Price Consciousness (BL)

	< 25	[26-40]	[41-60]	> 60
High PC	1,69	0,36	1,10	0,05
Medium PC	0,16	0,07	0,09	0,09
Low PC	1,39	0,36	0,88	0,12
Q	**6,36**			
p-value	**1,17E-02**			

Table 44.1 – Observed frequencies table: Age and Value Consciousness (VC)

	< 25	[26-40]	[41-60]	> 60	SUM
High VC	131,00	150,00	338,00	35,00	654,00
Medium VC	20,00	40,00	89,00	6,00	155,00
Low VC	21,00	42,00	121,00	15,00	199,00
SUM	172,00	232,00	548,00	56,00	1008,00

Table 44.2 – Expected frequencies table: Age and Value Consciousness (VC)

	< 25	[26-40]	[41-60]	> 60	SUM
High VC	111,60	150,52	355,55	36,33	654,00
Medium VC	26,45	35,67	84,27	8,61	155,00
Low VC	33,96	45,80	108,19	11,06	199,00
SUM	172,00	232,00	548,00	56,00	1008,00

Table 44.3 – Q-test and p-value: Age and Value Consciousness (VC)

	< 25	[26-40]	[41-60]	> 60
High VC	3,37	0,00	0,87	0,05
Medium VC	1,57	0,52	0,27	0,79
Low VC	4,94	0,32	1,52	1,41
Q	**15,63**			
p-value	**7,70E-05**			

Table 45.1 – Observed frequencies table: Age and Overall Perception of Private Labels (PLL)

	< 25	[26-40]	[41-60]	> 60	SUM
Positive PPL	77,00	83,00	232,00	24,00	416,00
Neutral PPL	98,00	137,00	249,00	19,00	503,00
Negative PPL	83,00	128,00	341,00	41,00	593,00
SUM	258,00	348,00	822,00	84,00	1512,00

Table 45.2 – Expected frequencies table: Age and Overall Perception of Private Labels (PLL)

	< 25	[26-40]	[41-60]	> 60	SUM
Positive PPL	70,98	95,75	226,16	23,11	416,00
Neutral PPL	85,83	115,77	273,46	27,94	503,00
Negative PPL	101,19	136,48	322,38	32,94	593,00
SUM	258,00	348,00	822,00	84,00	1512,00

Table 45.3 – Q-test and p-value: Age and Overall Perception of Private Labels (PLL)

	< 25	[26-40]	[41-60]	> 60
Positive PPL	0,51	1,70	0,15	0,03
Neutral PPL	1,73	3,89	2,19	2,86
Negative PPL	3,27	0,53	1,07	1,97
Q	**19,90**			
p-value	**8,15E-06**			

Table 46.1 – Observed frequencies table: Monthly Income per Capita and Perceived Differentiation (D)

	<400	[400-800[	[800-1500[	>1500	SUM
High D	94,00	182,00	152,00	29,00	457,00
Medium D	22,00	35,00	17,00	7,00	81,00
Low D	70,00	74,00	65,00	9,00	218,00
SUM	186,00	291,00	234,00	45,00	756,00

Table 46.2 – Expected frequencies table: Monthly Income per Capita and Perceived Differentiation (D)

	<400	[400-800[	[800-1500[	>1500	SUM
High D	112,44	175,91	141,45	27,20	457,00
Medium D	19,93	31,18	25,07	4,82	81,00
Low D	53,63	83,91	67,48	12,98	218,00
SUM	186,00	291,00	234,00	45,00	756,00

Table 46.3 – Q-test and p-value: Monthly Income per Capita and Perceived Differentiation (D)

	<400	[400-800[	[800-1500[	>1500
High D	3,02	0,21	0,79	0,12
Medium D	0,22	0,47	2,60	0,98
Low D	4,99	1,17	0,09	1,22
Q	**15,88**			
p-value	**6,75E-05**			

Table 47.1 – Observed frequencies table: Monthly Income per Capita and Brand Equity (BE)

	<400	[400-800[	[800-1500[	>1500	SUM
High BE	113,00	190,00	153,00	31,00	487,00
Medium BE	61,00	86,00	81,00	15,00	243,00
Low BE	74,00	112,00	78,00	14,00	278,00
SUM	248,00	388,00	312,00	60,00	1008,00

Table 47.2 – Expected frequencies table: Monthly Income per Capita and Brand Equity (BE)

	<400	[400-800[	[800-1500[	>1500	SUM
High BE	119,82	187,46	150,74	28,99	487,00
Medium BE	59,79	93,54	75,21	14,46	243,00
Low BE	68,40	107,01	86,05	16,55	278,00
SUM	248,00	388,00	312,00	60,00	1008,00

Table 47.3 – Q-test and p-value: Monthly Income per Capita and Brand Equity (BE)

	<400	[400-800[	[800-1500[	>1500
High BE	0,39	0,03	0,03	0,14
Medium BE	0,02	0,61	0,45	0,02
Low BE	0,46	0,23	0,75	0,39
Q	**3,53**			
p-value	**6,03E-02**			

Table 48.1 – Observed frequencies table: Monthly Income per Capita and Brand Loyalty (BL)

	<400	[400-800[	[800-1500[	>1500	SUM
High BL	94,00	173,00	140,00	24,00	431,00
Medium BL	50,00	76,00	71,00	13,00	210,00
Low BL	104,00	139,00	101,00	23,00	367,00
SUM	248,00	388,00	312,00	60,00	1008,00

Table 48.2 – Expected frequencies table: Monthly Income per Capita and Brand Loyalty (BL)

	<400	[400-800]	[800-1500[	>1500	SUM
High BL	106,04	165,90	133,40	25,65	431,00
Medium BL	51,67	80,83	65,00	12,50	210,00
Low BL	90,29	141,27	113,60	21,85	367,00
SUM	248,00	388,00	312,00	60,00	1008,00

Table 48.3 – Q-test and p-value: Monthly Income per Capita and Brand Loyalty (BL)

	<400	[400-800[	[800-1500[	>1500
High BL	1,37	0,30	0,33	0,11
Medium BL	0,05	0,29	0,55	0,02
Low BL	2,08	0,04	1,40	0,06
Q	**6,59**			
p-value	**1,02E-02**			

Table 49.1 – Observed frequencies table: Monthly Income per Capita and Price Consciousness (PC)

	<400	[400-800[	[800-1500[	>1500	SUM
High PC	65,00	85,00	53,00	9,00	212,00
Medium PC	37,00	52,00	41,00	11,00	141,00
Low PC	84,00	154,00	140,00	25,00	403,00
SUM	186,00	291,00	234,00	45,00	756,00

Table 49.2 – Expected frequencies table: Monthly Income per Capita and Price Consciousness (PC)

	<400	[400-800[	[800-1500[	>1500	SUM
High PC	52,16	81,60	65,62	12,62	212,00
Medium PC	34,69	54,27	43,64	8,39	141,00
Low PC	99,15	155,12	124,74	23,99	403,00
SUM	186,00	291,00	234,00	45,00	756,00

Table 49.3 – Q-test and p-value: Monthly Income per Capita and Price Consciousness (PC)

	<400	[400-800[	[800-1500[	>1500
High PC	3,16	0,14	2,43	1,04
Medium PC	0,15	0,10	0,16	0,81
Low PC	2,32	0,01	1,87	0,04
Q	**12,22**			
p-value	**4,73E-04**			

Table 50.1 – Observed frequencies table: Monthly Income per Capita and Value Consciousness (VC)

	<400	[400-800[	[800-1500[	>1500	SUM
High VC	163,00	263,00	198,00	30,00	654,00
Medium VC	45,00	63,00	36,00	11,00	155,00
Low VC	40,00	62,00	78,00	19,00	199,00
SUM	248,00	388,00	312,00	60,00	1008,00

Table 50.2 – Expected frequencies table: Monthly Income per Capita and Value Consciousness (VC)

	<400	[400-800]	[800-1500]	>1500	SUM
High VC	160,90	251,74	202,43	38,93	654,00
Medium VC	38,13	59,66	47,98	9,23	155,00
Low VC	48,96	76,60	61,60	11,85	199,00
SUM	248,00	388,00	312,00	60,00	1008,00

Table 50.3 – Q-test and p-value: Monthly Income per Capita and Value Consciousness (VC)

	<400	[400-800[	[800-1500[	>1500
High VC	0,03	0,50	0,10	2,05
Medium VC	1,24	0,19	2,99	0,34
Low VC	1,64	2,78	4,37	4,32
Q	**20,54**			
p-value	**5,83E-06**			

Table 51.1 – Observed frequencies table: Monthly Income per Capita and Overall Perception of Private Labels (PPL)

	<400	[400-800[	[800-1500[	>1500	SUM
High PPL	96,00	174,00	133,00	17,00	420,00
Medium PPL	138,00	200,00	155,00	32,00	525,00
Low PPL	138,00	208,00	180,00	41,00	567,00
SUM	372,00	582,00	468,00	90,00	1512,00

Table 52.2 – Expected frequencies table: Monthly Income per Capita and Overall Perception of Private Labels (PPL)

	<400	[400-800]	[800-1500]	>1500	SUM
High PPL	103,33	161,67	130,00	25,00	420,00
Medium PPL	129,17	202,08	162,50	31,25	525,00
Low PPL	139,50	218,25	175,50	33,75	567,00
SUM	372,00	582,00	468,00	90,00	1512,00

Table 53.3 – Q-test and p-value: Monthly Income per Capita and Overall Perception of Private Labels (PPL)

	<400	[400-800[	[800-1500[	>1500
High PPL	0,52	0,94	0,07	2,56
Medium PPL	0,60	0,02	0,35	0,02
Low PPL	0,02	0,48	0,12	1,56
Q	**7,25**			
p-value	**7,09E-03**			

Appendix E – Multiple Correspondence Analysis (MCA)

Table 1 - Representativeness of each class in the model (weight and relative weight)

	Weight	Weight (relative)	F1	F2
National brand (NB) milk consumers	129	0,057	0,103	0,001
Private label (PL) milk consumers	123	0,054	0,108	0,001
Perceived Differentiation (D)- high	176	0,078	0,050	0,001
Perceived Differentiation (D) - low (or medium)	76	0,034	0,116	0,003
Brand Equity (BE) - high	151	0,067	0,064	0,050
Brand Equity (BE) - low (or medium)	101	0,045	0,096	0,075
Brand Loyalty (BL) - high	127	0,056	0,080	0,115
Brand Loyalty (BL) - low (or medium)	125	0,055	0,082	0,116
Price Consciousness (PC) - low	151	0,067	0,058	0,029
Price Consciousness (PC) - high (or medium)	101	0,045	0,086	0,043
Value Consciousness (VC) - high	180	0,079	0,019	0,057
Value Consciousness (VC) - low (or medium)	72	0,032	0,046	0,141
Perception of Private Labels (PPL) - low	137	0,060	0,018	0,050
Perception of Private Labels (PPL) - high (or medium)	115	0,051	0,021	0,060
Income per capita - high	93	0,041	0,021	0,016
Income per capita - low	159	0,070	0,012	0,010
Age - less than 25 years old	43	0,019	0,016	0,193
Age - more than 25 years old	209	0,092	0,003	0,040

Table 2 –Measurement of Quality of each class in the dimensions (Squared Cosines)

	F1	F2
National brand (NB) milk consumers	0,507	0,002
Private label (PL) milk consumers	0,507	0,002
Perceived Differentiation (D)- high	0,402	0,005
Perceived Differentiation (D) - low (or medium)	0,402	0,005
Brand Equity (BE) - high	0,385	0,162
Brand Equity (BE) - low (or medium)	0,385	0,162
Brand Loyalty (BL) - high	0,391	0,298
Brand Loyalty (BL) - low (or medium)	0,391	0,298
Price Consciousness (PC) - low	0,348	0,093
Price Consciousness (PC) - high (or medium)	0,348	0,093
Value Consciousness (VC) - high	0,157	0,255
Value Consciousness (VC) - low (or medium)	0,157	0,255
Perception of Private Labels (PPL) - low	0,095	0,142
Perception of Private Labels (PPL) - high (or medium)	0,095	0,142
Income per capita - high	0,081	0,033
Income per capita - low	0,081	0,033
Age - less than 25 years old	0,046	0,299
Age - more than 25 years old	0,046	0,299