

INNOVATION IN THE POSITIONING OF NUTELLA FERRERO'S PRODUCT

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Innovation in the positioning of Nutella

“Innovation is change that unlocks new value.”

Jamie Notter

“Marketing and innovation are inextricably linked.”

Gordon, R. F.

“Business has only two functions: marketing and innovation.”

Milan Kundera

“There are only two things in a business that makes money - innovation and marketing, everything else is cost.”

Peter Drucker

“A brand is no longer what we tell the consumer it is - it is what consumers tell each other it is.”

Scott Cook

Innovation in the positioning of Nutella

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Resumo

Este estudo visa identificar a evolução do posicionamento da Nutella e os modelos de inovação utilizados, com vista a reforçar a sua presença no dia-a-dia dos consumidores, potenciando um incremento das vendas.

Foi realizado um estudo exploratório através de questionário online, especificamente desenvolvido para esse propósito, baseado na literatura existente e em indicações da Ferrero. O questionário foi divulgado através de redes sociais (Facebook e LinkedIn) e e-mail.

Os resultados foram analisados estatisticamente com o método descritivo e com o Qui-Quadrado.

Foram recolhidas 607 respostas válidas. 32,1% eram compradores de Nutella e 48,9% eram consumidores de Nutella. Os principais motivos para comprar Nutella foram o *sabor* e a *confiança na marca*, sendo que as *calorias* e *não saudável* representaram os principais motivos para não comprar Nutella. A análise ao tipo de consumidor revelou que 28,3% das compras de Nutella visam o consumo por adultos e crianças e 48% visam o consumo exclusivo por adultos. 10,5% afirmou comprar Nutella para o pequeno-almoço e 12,5% assumiu consumir Nutella ao pequeno-almoço. 32% considerou a Nutella como ideal para o pequeno-almoço. 21% dos não-consumidores de Nutella concordaram que o seu consumo seria ideal ao pequeno-almoço.

Posicionar a Nutella como um produto a consumir diariamente ao pequeno-almoço pode traduzir-se em relevantes aumentos das receitas da Ferrero, dado que o comportamento repetitivo do consumidor é importante para a compreensão da marca, mas também financeiramente.

A indiscutível importância dada à *saúde* e à *composição calórica* da Nutella sugerem o desenvolvimento de uma versão light, com redução calórica.

Palavras-chave: Inovação; Posicionamento; Comportamento do consumidor; Marketing

JEL: M31

Innovation in the positioning of Nutella

Abstract

The aim of this research is to identify Nutella positioning as well as the innovation models used. This will serve two purposes: to reinforce its presence on a daily basis of the consumers and to contribute to a solid increase of sales.

An exploratory study was conducted through an online survey specifically created for that purpose. The survey was elaborated based on the existing literature and Ferrero guidance. It was released through social networks (Facebook and LinkedIn), and sent via e-mail to several contacts. The results were analyzed with descriptive and Qui-square statistical methods.

607 valid answers were collected. 32,1% were Nutella shoppers and 48,9% Nutella consumers. The main motives to buy Nutella were *taste*, followed by *brand trust*. *Calories* and *not healthy* were the main motives to not buy and to not consume Nutella. Consumer analysis revealed that 28,3% of Nutella purchases were intended for children and adults, but 48% were exclusively for adults consumption. 10,5% chose Nutella for breakfast, and 12,5% assumed to consume it at breakfast. 32% considered Nutella ideal to have at breakfast, due to *taste*. 21% of non-consumers agreed that Nutella would be ideal for consumption at breakfast.

Positioning Nutella as an everyday item at breakfast could be translated into relevant increases of Ferrero profits, since repeated consumer behavior is important for brand understanding, and also for financial motives.

The overwhelming importance placed on health and the caloric composition of this product, suggests the creation of a lighter version of Nutella, with caloric reduction.

Keywords: Innovation; Positioning; Consumer behavior; Marketing

JEL: M31

Index

Acknowledgments

Resumo

Abstract

Index.....	I
Figure Index	II
Graphic Index.....	II
Table Index.....	III
Executive Summary	V
1. Introduction.....	1
1.1. Research goal	1
1.2. Research problem.....	1
1.3. Research questions	2
2. Definition of the problem context.....	3
3. Literature review	6
3.1. The importance of positioning innovation	6
3.1.1. Innovation concept	6
3.1.2. Managing innovation.....	6
3.1.3. Innovation types	7
3.1.4. Position innovation.....	9
3.1.5. Innovation classification.....	9
3.1.6. Häagen-Dazs.....	10
3.2. Customer segmentation and positioning	10
3.2.1. Segmentation concept.....	10
3.2.2. Segmentation criteria.....	11
3.2.3. Positioning concept.....	13
3.3. Marketing Mix.....	13
3.3.1. Marketing mix concept.....	13
3.3.2. The role of emotions.....	14
3.4. Consumer behavior	15
3.4.1. Consumer behavior concept	15
3.4.2. The decision-making process	16
3.4.3. Hedonic consumption	21
3.4.4. Habit concept.....	22
3.5. Conceptual framework of reference and hypothesis development	24

Innovation in the positioning of Nutella

4. Methodology.....	29
4.1. Research methods.....	29
4.2. Survey pretest.....	31
4.3. Online survey design.....	32
4.4. Sampling method.....	34
4.5. Data processing.....	34
5. Survey results.....	36
5.1. Socio-demographic characterization of the sample.....	36
5.2. Descriptive characterization of survey results.....	37
5.3. Discussion of the hypotheses.....	57
6. Conclusions.....	66
6.1. Main conclusions.....	66
6.1.1. Innovation proposal.....	67
6.2. Strengths and limitations.....	69
6.3. Recommendations for further research.....	70
7. List of references.....	72
8. Appendices.....	77
Appendix 1 - Ferrero Brands (Portugal).....	77
Appendix 2 - Survey.....	77
Appendix 3 - Cross Tabulations and Frequencies Tables regarding Spreadable creams' purchase.....	84
Appendix 4 - Graphics regarding the influence of socio-demographic characteristics on motives to purchase Nutella.....	101
Appendix 5 - Cross tabulations and Frequencies Tables regarding Nutella consumption.....	109
Appendix 6 - Graphics regarding the influence of socio-demographic characteristics on motives to not consume Nutella.....	115
Appendix 7 - Cross tabulations and Frequencies Tables regarding Nutella consumption at breakfast.....	123

Figure Index

Figure 1: The 4Ps of innovation space.....	2
Figure 2: Typologies of innovation, from past to present.....	7

Graphic Index

Graphic 1: Bread consumption by Portuguese families.....	3
Graphic 2: Spreadable creams consumption by Portuguese families.....	3
Graphic 3: Sales value of the chocolate spreadable creams category (2015).....	4

Innovation in the positioning of Nutella

Graphic 4: Sales value of the chocolate spreadable creams category (2014 vs 2013).....	4
Graphic 5: Sales value (pp) of the chocolate spreadable creams category (2015).....	4
Graphic 6: Sample characterization	36
Graphic 7: Spreadable creams purchased.....	37
Graphic 8: Nutella purchase frequency	40
Graphic 9: Purchase preferences of package type.....	41
Graphic 10: Nutella consumer type purpose at purchase moment.....	42
Graphic 11: Motives to buy Nutella	43
Graphic 12: Motives to not buy Nutella.....	45
Graphic 13: Nutella consumption by age group.....	47
Graphic 14: Nutella consumption frequency	49
Graphic 15: Motives to not consume Nutella.....	50
Graphic 16: Breakfast consumption.....	52
Graphic 17: Breakfast options.....	52
Graphic 18: Nutella consumption at breakfast.....	53
Graphic 19: Frequency of Nutella consumption at breakfast.....	54
Graphic 20: Motives to not consider Nutella ideal for breakfast	55
Graphic 21: Motives to consider Nutella ideal for breakfast	55

Table Index

Table 1: Variables which influence consumer behavior	15
Table 2: Factors that affect the consumer buying process	17
Table 3: Comparison of gender distribution between <i>Nutella shoppers</i> and <i>All respondents</i> .	38
Table 4: Comparison of gender distribution between <i>Nutella shoppers</i> and <i>All spreadable creams shoppers</i>	38
Table 5: Comparison of age group distribution between <i>Nutella shoppers</i> and <i>All respondents</i>	38
Table 6: Comparison of education level distribution between <i>Nutella shoppers</i> and <i>All respondents</i>	39
Table 7: Comparison of professional activity distribution between <i>Nutella shoppers</i> and <i>All respondents</i>	39
Table 8: Comparison of household composition distribution between <i>Nutella shoppers</i> and <i>All respondents</i>	39
Table 9: Comparison of household composition distribution between <i>Nutella shoppers</i> and <i>All spreadable creams shoppers</i>	40
Table 10: Comparison of monthly gross household income distribution between <i>Nutella shoppers</i> and <i>All respondents</i>	40
Table 11: Influence of socio-demographic characteristics on <i>Brand trust</i> motive	43
Table 12: Influence of socio-demographic characteristics on <i>Spur of the moment</i> motive	44
Table 13: Influence of socio-demographic characteristics on <i>Price</i> motive	44
Table 14: Influence of socio-demographic characteristics on <i>Sale Price</i> motive	44
Table 15: Influence of socio-demographic characteristics on <i>Taste</i> motive.....	45
Table 16: Comparison of gender distribution between <i>Nutella consumers</i> and <i>All respondents</i>	46
Table 17: Comparison of age distribution between <i>Nutella consumers</i> and <i>All respondents</i> ..	46

Innovation in the positioning of Nutella

Table 18: Comparison of education level distribution between <i>Nutella consumers</i> and <i>All respondents</i>	47
Table 19: Comparison of professional activity distribution between <i>Nutella consumers</i> and <i>All respondents</i>	48
Table 20: Comparison of household composition distribution between <i>Nutella consumers</i> and <i>All respondents</i>	48
Table 21: Comparison of monthly gross household distribution between <i>Nutella consumers</i> and <i>All respondents</i>	48
Table 22: Distribution of spreadable creams purchased by <i>Nutella consumers</i>	49
Table 23: Influence of socio-demographic characteristics on <i>Taste</i> motive	50
Table 24: Influence of socio-demographic characteristics on <i>Price</i> motive	51
Table 25: Influence of socio-demographic characteristics on <i>Not healthy</i> motive	51
Table 26: Influence of socio-demographic characteristics on <i>Calories</i> motive.....	51
Table 27: Influence of socio-demographic characteristics on <i>Allergies</i> motive	51
Table 28: Cross tabulations between <i>Consider Nutella ideal for breakfast</i> and <i>different profiles</i>	56

Executive Summary

A Nutella, uma das marcas mais conhecidas do grupo Ferrero, é o creme para barrar de chocolate e avelã mais vendido do mundo. Apesar de manter a liderança na categoria de cremes para barrar de chocolate em Portugal, existem ainda oportunidades a capitalizar, de modo a fortalecer a sua presença no dia-a-dia das famílias portuguesas.

85% das famílias portuguesas consome pão, mas apenas 6% da população portuguesa o consome com cremes de chocolate, enquanto 55% o faz com manteiga, representando uma nítida oportunidade a capitalizar, a fim de atenuar essa discrepância. Por sua vez, as marcas de distribuidor estão avidamente a crescer, o que representa uma ameaça para as marcas de fabricante em geral, incluindo a Nutella.

Deste modo, o principal objetivo desta investigação é identificar a evolução do posicionamento da Nutella, de modo a aumentar a sua penetração e conseqüentemente as vendas, baseando-se num dos eixos do modelo de tipos de inovação, desenvolvido por Francis e Bessant (2005): “inovação no posicionamento”.

Assim, o presente estudo liga os temas de Inovação e Marketing, incidindo sobre os hábitos de compra e de consumo de cremes para barrar, em particular de Nutella.

Numa primeira fase, foi reunida informação sobre os temas e subtemas de interesse, constantes na literatura, com foco na inovação no posicionamento e no comportamento do consumidor. Com base na investigação teórica realizada, assim como em indicações da Ferrero, procedeu-se à elaboração de um questionário, que visava apurar os hábitos de compra e de consumo de cremes para barrar, em particular de Nutella, investigando também quais os principais motivos por detrás das intenções de compra e de consumo dos inquiridos (numa escala de Likert de 1-nada importante a 5-muito importante), tendo sido o principal instrumento utilizado no presente estudo exploratório.

O questionário foi divulgado *online*, através de redes sociais (Facebook e LinkedIn) e e-mail, almejando um target abrangente.

Foram obtidas 607 respostas válidas, tendo sido utilizado o método de amostragem por conveniência. A amostra era maioritariamente composta por mulheres (61,1%), pela faixa etária 18-35 anos (67,1%), por indivíduos com educação superior concluída (77,4%) e por trabalhadores por conta de outrem (55,2%).

A análise realizada foi maioritariamente descritiva, tendo sido pontualmente utilizado o teste do Qui-Quadrado de *Pearson*, para avaliar a independência entre variáveis, quando aplicável.

Innovation in the positioning of Nutella

Dos inquiridos, 32,1% eram compradores de Nutella e 48,9% eram consumidores de Nutella.

Em relação aos hábitos de compra de Nutella, o tipo de embalagem mais escolhido foi o de 400g e a principal intenção de consumo da compra de Nutella foi o lanche, salientando-se ainda o tipo de consumidor a quem se destinava a compra de Nutella como predominantemente adulto (consumo exclusivo por adultos: 48%; consumo por adultos e crianças: 28,3%; consumo exclusivo por crianças: 23,7%). Por sua vez, a frequência de compra foi equilibradamente distribuída entre *mensal* (30,3%), *trimestral* (30,3%) e *rara* (29,7%).

Quanto aos motivos para a compra de Nutella, o *sabor* mereceu especial destaque (81% classificou como 5), sendo que a *confiança na marca* ocupou a segunda posição (47,2% classificou como 5 e 36,4% como 4). Por seu turno, os principais motivos para não comprar Nutella foram as *calorias* (49,7% de 5) e o facto de *não ser saudável* (49,2% de 5). Por sua vez, foi concluído que o perfil do consumidor de Nutella é influenciado pelo género (mulheres), pelo nível de educação (ligeiramente inferior ao da amostra) e pela composição do agregado familiar (maioritariamente de 4 pessoas).

Em relação aos hábitos de consumo de Nutella, a maior frequência de consumo foi *rara* (47,5%), *uma vez por mês* (20,2%) e *aos fins-de-semana* (17,8%). O momento de consumo preferido foi o lanche da tarde e a combinação mais evidenciada foi o pão, ganhando ainda maior destaque no consumo ao pequeno-almoço em detrimento de outras combinações com Nutella.

Em linha com os motivos para não comprar Nutella, os principais motivos para não consumir Nutella foram também as *calorias* (51% de 5) e o facto de *não ser considerado saudável* (49,4% de 5), revelando a tendência para a preferência por uma versão menos calórica, onde se identificou uma oportunidade.

Por sua vez, os hábitos de consumo ao pequeno-almoço revelaram que as combinações mais populares com o pão ao pequeno-almoço são a *manteiga* (65,9%), o *queijo* (54,7%) e o *fiambre* (52,9%), sendo que a Nutella representa 15,2% das preferências.

10,5% afirmou comprar Nutella para o pequeno-almoço e 12,5% assumiu consumir Nutella ao pequeno-almoço. No entanto, 32% dos inquiridos considerou a Nutella como ideal para ser consumida ao pequeno-almoço, destacando o seu *sabor* e a sua *composição energética*, pelo que foi identificada uma oportunidade a capitalizar.

Posicionar a Nutella como um produto para ser consumido diariamente ao pequeno-almoço pode traduzir-se em relevantes aumentos das receitas da Ferrero, dado que o

Innovation in the positioning of Nutella

comportamento repetitivo do consumidor é importante não só para a compreensão da marca, mas também financeiramente.

A indiscutível importância dada à *saúde* e à *composição calórica* de Nutella sugerem o desenvolvimento de uma versão light, com redução de calorias, dado ter sido identificado como uma das principais desvantagens deste produto.

Em relação a recomendações futuras, a amostra deve ser estratificada de modo a permitir generalizações, sendo aconselhável um amostra maior.

1. Introduction

Nutella, one of the well-known brands of Ferrero Group (Appendix 1), is the best seller hazelnut-based chocolate spreadable cream in the world, having been launched around 50 years ago (1964)¹.

In Portugal, Nutella continues to lead the market in the chocolate spreadable creams category². Yet, in order to keep away from its competitors, Ferrero intends to increase its market share, by improving its presence on the family's daily consumption habits.

Hence, this project aims to identify what the positioning of Nutella brand should be, under the umbrella of innovation management. In order to support this goal, questionnaires will be carried out to analyze purchase and consumption habits of spreadable creams. Only the Portuguese audience will be considered during the research to ensure that the insights collected are from the selected market to study.

1.1. Research goal

Considering the research problem mentioned above, the main research goal is to innovate Nutella positioning. However, in order to reach that knowledge, it will take place a study regarding purchasing and consumption habits of Nutella, being guided by the following research goals:

- 1- Understand the purchasing habits of Nutella.
- 2- Understand the consumption habits of Nutella.
- 3- Understand the consumption habits of Nutella at breakfast.

1.2. Research problem

Innovation is seen as the key to businesses success and it is a fact that in today's rapidly changing environment there is almost no opportunity for a company to "*maintain its market share unless it is innovative*" (Doyle, P., 1997). The author adds that "*innovation can mean new products but it can also mean new markets, new marketing channels, new processes or new marketing concepts*". Thus, innovation is also present in the way a product is introduced or repositioned in the market, in order to be perceived in a different way and to be successful.

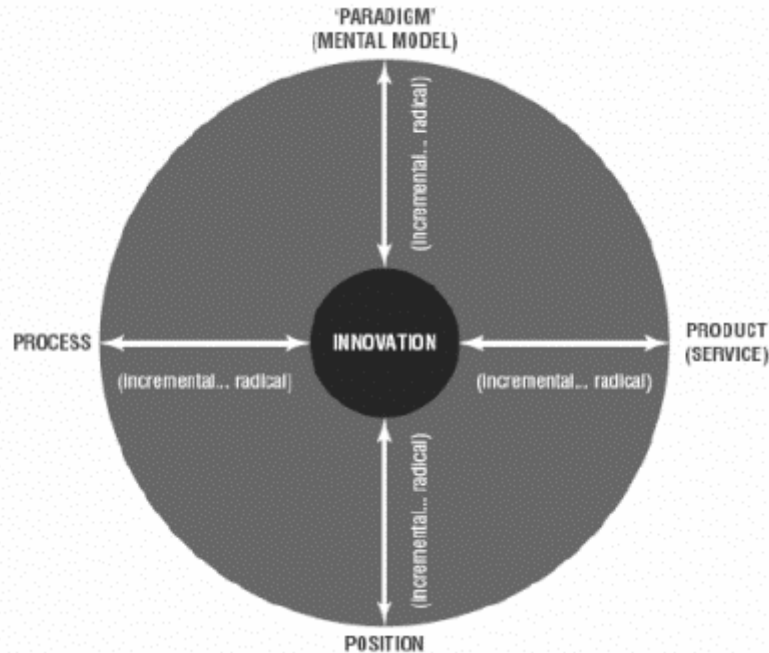
Within the innovation management field, there is a model of types of innovation proposed by Bessant & Francis (2005), which consists of four types of innovation, representing the four dimensions of the innovation space (Figure 1): *product innovation; process innovation;*

¹ Source: <http://www.nutella.com/pt/pt/historia> [Accessed 9 July 2016]

² Source: Nielsen, 2015. Total Value Sales. Total Chocolate Spreadable Creams. H+S+LIDL Portugal

position innovation and *paradigm innovation*; where *position innovation* stands for the changes in the context in which the products/services are introduced.

Figure 1: The 4Ps of innovation space



Source: Tidd, J. & Bessant, J. (2009)

Gordon, R. F. (1986: 231) notes that “*marketing and innovation are inextricably linked, so much so that some authors have seen them as synonymous*”.

Considering this argument and Nutella’s goals, this research will be focused on positioning innovation, through the existing connection between marketing and innovation. Therefore, the research problem is how to innovate Nutella’s positioning.

In order to understand why positioning innovation is so important and how to achieve it, four areas of research will be presented:

1. The importance of positioning innovation;
2. Customer segmentation and positioning;
3. Marketing-mix;
4. Consumption behavior

1.3. Research questions

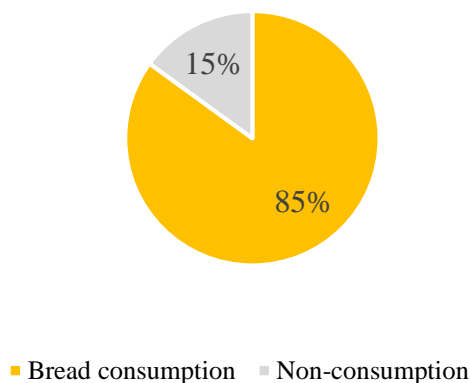
Taking into consideration the research problem and the research goals, the following are the research questions, which this thesis sets out to answer:

1. What are the Portuguese purchasing and consumptions habits regarding Nutella?
2. What should be the new Nutella positioning in Portugal?

2. Definition of the problem context

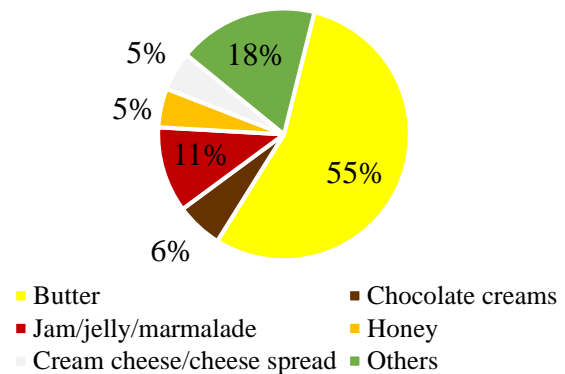
There is a huge culture of bread consumption by Portuguese population, reaching 85% of penetration in Portuguese homes and 60% of penetration regarding the habit of spreading creams on bread, according to IPSOS data, shared by Ferrero Group³. In spite of this evidence, only 6% of the Portuguese population spread the bread with chocolate creams, against 55% who spread it with butter, whereby there is a huge opportunity to exploit.⁴

Graphic 1: Bread consumption by Portuguese families



Source: Market Study by Ipsos Portugal; shared by Ferrero Group - 2014

Graphic 2: Spreadable creams consumption by Portuguese families



Source: Market Study by Ipsos Portugal; shared by Ferrero Group - 2014

Nielsen only considers in the chocolate spreadable creams category, chocolate creams such as Nutella, Tulicreme and Dulcinea as well as brand's distributors.⁵ However, Ferrero consider a broad spreadable creams category which also includes spreadable sweets, jams, marmalades and honey besides chocolate spreadable creams. Moreover, in order to have a more complete perspective of these kind of products, spreadable creams such as butter and cream cheese will also be considered in the analysis, once all of them are aimed to be spread on the bread, making them equivalent options from the consumer's point of view.

³Criteria: have consumed at least once in the last 12 months. 2014

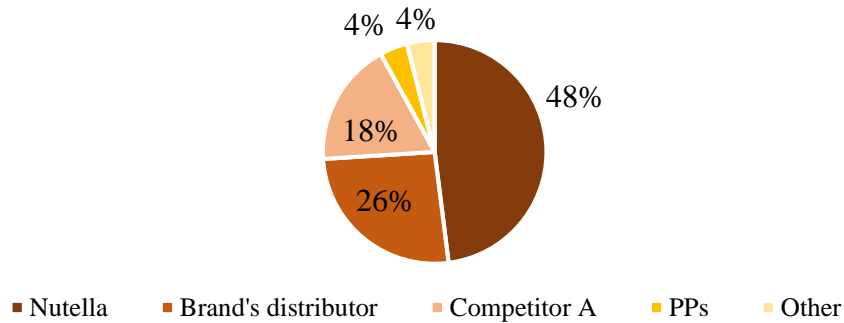
⁴ Source: Market Study by Ipsos Portugal (2014) - Out of 899 respondents

⁵ Source: Nielsen Annuary Food 2014

Innovation in the positioning of Nutella

Chocolate spreadable creams fair share is 36%, considering the broad category of spreadable creams⁶. Within the segment of chocolate spreadable creams, Nutella's fair share is 48%⁷ (5% market share growth vs 2014), leading the market in the chocolate spreadable creams category in Portugal (Graphic 3).

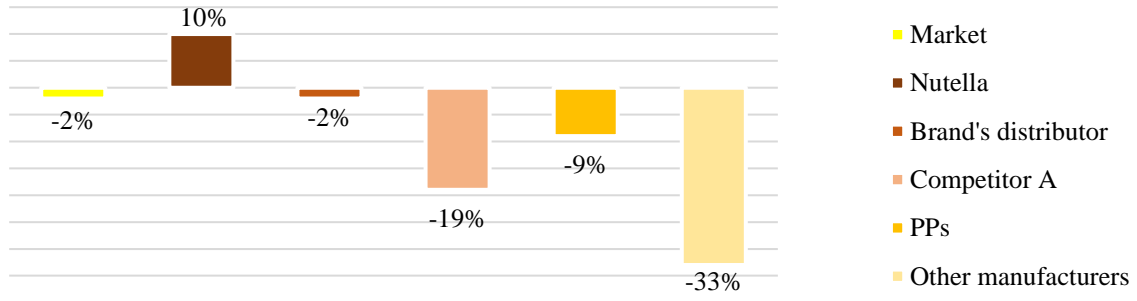
Graphic 3: Sales value of the chocolate spreadable creams category (2015)



Source: Nielsen, Total Value Sales 2015. Total Chocolate Spreadable Creams H+S+LIDL. Portugal

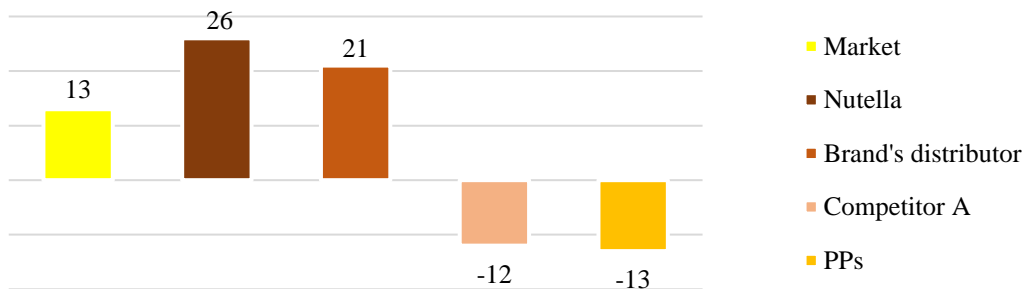
Nutella have been improving its sales in value consistently in comparison with the market: +10% 2014 vs 2013 (Graphic 4) and +26 pp in 2015 (Graphic 5).

Graphic 4: Sales value of the chocolate spreadable creams category (2014 vs 2013)



Source: Nielsen, Total Value Sales 2014 vs 2013. Total Chocolate Spreadable Creams H+S+LIDL. Portugal

Graphic 5: Sales value (pp) of the chocolate spreadable creams category (2015)



Source: Nielsen, Total Value Sales 2015. Total Chocolate Spreadable Creams H+S+LIDL. Portugal

⁶ Source: Nielsen, Value Market Tracker & SOS Linear H+S 2013 vs 2012

⁷ Source: Nielsen, 2015. Total Value Sales. Total Chocolate Spreadable Creams H+S+LIDL Portugal

Innovation in the positioning of Nutella

Although the brand's distributor sales have registered 0% growth in volume and 2% decrease in value in the chocolate spreadable creams category (2014 vs 2013)⁸, they are growing incredibly fast, having increased 21pp of value in sales in 2015 (Graphic 5).

According to a study by Nielsen (2014), 80% of Portuguese people see brand's distributor as a good alternative to manufacturer brands and 78% consider it as a good value for money.⁹

Additionally, the latest Nielsen sales data shows that the popularity of private label keeps growing across Europe, with a market share of 41%¹⁰ in Portugal (volume). Also, in an international research with more than 27,000 participants conducted by Nielsen (2011), more than 50% claimed to buy store brands in response to tough economic situations, but 91% of those respondents also affirmed that they would keep buying store brands after the economy improved (González-Benito, O.; et al., 2014).

These data allows to conclude that Nutella's performance has been great after all. However, brand's distributor, for example, is challenging its leadership, being an important threat to look at. In conclusion, there are still huge opportunities to exploit in order to increase Nutella's market share, making it the top choice spreadable cream on bread, intrinsic to the daily lives of Portuguese consumers.

⁸ Source: Nielsen Annuary Food 2014

⁹ Source: <http://www.nielsen.com/pt/pt/insights/news/2014/oito-em-cada-dez-portugueses-veem-a-marca-de-distribuicao-como-uma-boa-alternativa-a-do-fabricante.html> [Accessed 3 June 2016]

¹⁰ Source: <http://www.plmainternational.com/industry-news/private-label-today> [Accessed 23 September 2016]

3. Literature review

3.1. The importance of positioning innovation

3.1.1. Innovation concept

Several authors agree that innovation is often confused with invention. According to Doyle, P. (1997), invention is related to new products but innovation concerns new solutions, which offer value to customers and which may, or may not, involve new technology, being able to meet customer's needs in a more effective way.

Lawson & Samson (2001), cited by Lillis, B. et al. (2015: 50), say that "*innovation is a key mechanism to achieve organizational growth and renewal*". Also, Zahra & Covin (1994) suggest that "*innovation is widely considered as the life blood of corporate survival and growth*" (Rowley, J. et al., 2011: 73).

Innovation is also typically defined as "*successful implementation of creative ideas within an organization*", as described by Amabile (1996), cited by Rocca & Snehota (2014: 441). According to Rowley, J. et al (2011: 73), "*innovation is recognized to play a central role in creating value and sustaining competitive advantage*".

According to Tidd & Bessant (2009: 3), "*innovation is driven by the ability to see connections, to spot opportunities and to take advantage of them*", being not only "*about opening up new markets, but also offering new ways of serving established and mature ones*". The same authors argue that innovation can still take place by "*repositioning the perception of an established product or process in a particular context*" Tidd & Bessant (2009: 22), and that is also "*consistently found to be the most important characteristic associated with success*" Tidd & Bessant (2009: 5).

To sum up the viewpoints shared by the resource-based theorists mentioned above, there is a clear widespread recognition of the increasing importance of innovation to organizations and economies as marketplaces become increasingly dynamic (Rowley, J. et al., 2011).

3.1.2. Managing innovation

Francis, D. et al. (2005: 171) note that "*innovation can be managed*" and Birkinshaw, J. et al. (2008: 826) explain the concept of managing innovation, stating that it involves "*the introduction of novelty in an established organization*".

Bessant, J. et al. (2005) warn that innovation is not a natural attribute of organizations, whereby it needs to be enabled through active management. Pavitt (2002) adds that in order to manage innovation successfully, organizations have to adapt, configure and learn their own versions to build certain routines (Bessant, J. et al., 2005).

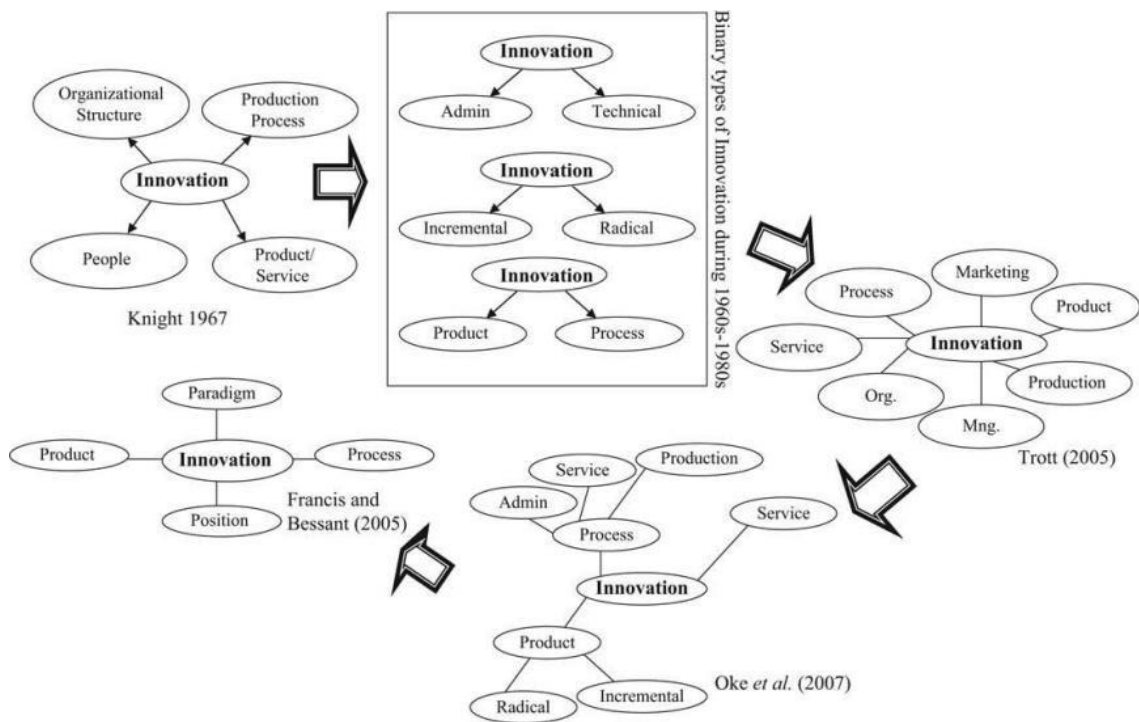
In order to achieve that success, Ferreira, J. et al. (2015) list the following as fundamental factors for innovation: firm structure; organization; appropriate innovation strategy; and communication of the strategy to employees - citing Lemon & Sahota (2004), Roberts & Berry (1985), Slappendel (1996) and Wheelwright & Clark (1995).

The capability of innovation management is an important strategic issue since innovation takes the key role in the survival and growth of the businesses (Francis, D. et al., 2005). “Management research suggests that innovative firms - those which are able to use innovation to differentiate their products and services from competition - are on average twice as profitable as other firms” (Tidd et al., 1997, cited by Francis, D. et al., 2005: 171).

In spite of several papers regarding innovation management and the recognition of its importance, Jorgensen & Ulhoi (2010) and Tidd (2001) argue that there still remains substantial debate as to how the company’s capability to innovate occurs (Lillis, B. et al., 2015).

3.1.3. Innovation types

Figure 2: Typologies of innovation, from past to present



Source: Rowley, J. et al. (2011)

There are plenty of models, classifications and definitions of types of innovation used by different researchers over time, representing therefore a challenge to understand them. Rowley, J. et al. (2011) summarized the key existing models in order to provide a better understanding of the relationships between the various proposed types of innovation (Figure 2).

Siguaw et al. (2006) advocate that organizations need to “invest in different types of innovation, since different types of innovation influence organizations in different ways and achieve different outcomes and impacts” (Rowley, J. et al., 2011: 75).

This study will be mainly supported by the Francis and Bessant (2005) model of types of innovation (Figure 1), as it is a relatively recent model and it is the only one to include the important concepts of position and paradigm.

Based on the mentioned model, the authors propose that innovation capability can be targeted in four main ways, explaining the concept of each category (Francis, D. et al., 2005; Tidd & Bessant, 2009):

- *Product innovation* - innovation to introduce or improve products that an organization offers.
- *Process innovation* - innovation to introduce or improve processes in the ways in which they are created and delivered.
- *Position innovation* - innovation to define or re-define the positioning of the firm or products, changing the context in which the products/services are introduced.
- *Paradigm innovation* - innovation to define or re-define the dominant paradigm of the firm, changing the underlying mental models which frame what the organization does.

Francis, D. et al. (2005) argue that these 4Ps are not independent categories, explaining that they have fuzzy boundaries, once firms can strive for all at the same time and there are actually connections between them. Nevertheless, the authors agree that the 4Ps provide a structured approach to examining the opportunity space for innovation.

The innovation space model is used to look at where the organization has currently innovation projects and where it might move in the future whilst the area indicated by the circle in Figure 1 is the potential innovation space in which an organization can operate (Tidd & Bessant, 2009). The authors illustrate this model with the following example: “if the emphasis has been on product and process innovation there may be scope for exploring more around position innovation”, where the offer and the story told are targeted (Tidd & Bessant, 2009: 25).

Tidd & Bessant (2009) conclude that the overall innovation space provides a simple map on which companies might invest, having had to consider some of the other characteristics of innovation which might shape strategic decisions regarding where and when to play.

3.1.4. Position innovation

As explained above, Francis, D. et al. (2005) reinforce that position innovation is not mentioned by some experts on innovation management who prefer to embrace a narrower definition. Nevertheless, the realization that innovation can be positional is supported by some publications.

Guest et al. (1997), quoted by Francis, D. et al. (2005: 175), point out that for some products “*success depends on finding innovative ways of bringing to the market products that appeal to potential buyers*”. “*A positional innovation does not significantly affect the composition or functionality of the product but the meaning of the product in the eyes of the potential and/or the market segments selected as targets*” (Francis, D. et al., 2005: 175).

It can be argued that the capacity of companies to be innovative in product positioning has grown over the past 50 years for two main reasons, as commented by Francis, D. et al. (2005). Referring Tull & Hawkins (1993), the authors advocate that, on the one hand, there has been a huge effort to improve the processes of marketing and advertising agencies in order to build meanings in potential customers, which is due to their growing skills, availability of market research data and the increasing existence of means of persuasion. On the other hand, customer profiling has been becoming easier and quicker, due to low cost data processing.

Regarding this issue, Francis, D. et al. (2005) warn that the exploitation of positional innovation capacity can present specific management challenges, such as marketing decisions, since that can be collected billions of information about customers and potential customers, but those decisions need to be based on a limited number of significant variables.

According to Francis, D. et al (2005: 175), product positioning can be “*what the firm would like typical customers from targeted groups to feel and say about their product (and company)*”. The key aspect of the positioning strategy of an innovative product is the “*management of identities, through advertising, marketing, media, packaging and the manipulation of various signals*” (Doyle, 1997, cited by Francis, D. et al. 2005: 175).

3.1.5. Innovation classification

A key issue in managing innovation is the degree of change and newness involved in the different places across the innovation space, being classified either as incremental or radical innovation (Tidd & Bessant, 2009).

Although there are some authors who consider incremental and radical innovation as types of innovation (Figure 2), Francis & Bessant (2005) argue that innovation can vary

between those two classifications in each of its dimensions, being regarded as an attribute (Rowley, J. et al., 2011).

Dewar & Dutton (1986) explain that radical innovation is a “*fundamental change*” while incremental innovation is an “*add-on to a previous innovation without changing its essential concept*” (Rowley, J. et al., 2011: 77). Tidd & Bessant (2009) differentiate the terms, by considering incremental innovation as *doing better* and radical innovation as *doing different*.

3.1.6. Häagen-Dazs

An example of an incremental innovation at the position dimension is the success case of the global brand Häagen-Dazs. They were capable of giving a new and profitable life to an old and established product, namely ice-cream, made with well-known processes. Their strategy was to reposition their product as a pleasure to be enjoyed by adults – “*ice-cream for grown-ups*”, targeting a different market segment (Tidd & Bessant, 2009: 22).

Marketing specialists noted in the 1980s that ice-cream was associated with children and unsophisticated adults, what made them to come up with an ice-cream for sophisticated adults which is perceived as an “*affordable luxury*” (Francis, D. et al., 2005: 176). This example suggests that product identity can be as significant as its tangible attributes.

3.2. Customer segmentation and positioning

3.2.1. Segmentation concept

Market segmentation aims to match supply with demand, being essential to every marketing strategy of any company (Alderson, 1958, cited by Hultén, B., 2007) and it consists of dividing the market into distinctive groups of consumers, as homogenous as possible (Lendrevie, J. et. al, 2015). The authors argue that the challenge which companies face is to define strategies to satisfy each segment better than their competitors - each market segment is a group of consumers that react in a similar way to a set of marketing stimuli. Brandt, C. et al. (2011: 202) adds that “*traditionally, companies have segmented their potential customers on the basis of similar sets of needs and wants that should affect consumption habits*”.

However, Hultén (2007) argues that *market* segmentation has shifted to *customer* segmentation during the last decades, starting to classify customers in current and potential, based on their market reactions. It is harder to categorize consumers than ever before, particularly when using traditional segmentation criteria, due to the increasing complexity of buying behavior (Gordon, 1998, as cited by Hultén, B., 2007).

Brito, C. (2014) considers segmentation simultaneously consequent and precedent, since it is the consequence of the opportunities analysis process and it also precedes the positioning and marketing-mix strategy (Lendrevie, J. et al., 2015). The author also note that although the importance of segmentation strategies, companies are more and more concerned with their customers individual characteristics, rather than with the average characteristics of a segment.

Rubison (2014) refers that traditional consumer segmentation is at the heart of marketing practice, yet it simply does not work that well because it is rarely very actionable, whilst Roxo, F. (2014) suggests that behavioral segmentation, supported by the big data systems, might be a new hope to marketers (Lendrevie, J. et al., 2015).

Kotler (2004) and Wedel & Kamakura (2000) suggest that the market segmentation process involves three phases: “*segmenting, targeting and positioning*” (Dibb, S., 2005: 14). The author states that segmenting is the process of grouping customers with similar needs and characteristics into segments and targeting is related to the definition of relative attractiveness of the picked segments and to the decision of resources allocation. In line with Ries & Trout (1986), positioning involves developing marketing-mix strategies which are aimed to meet customers’ requirements in the targeted segments (cited by Dibb, S., 2005).

3.2.2. Segmentation criteria

Brandt, C. (2011: 199) affirms that traditionally companies have used “*demographics, behavioral variables and customer lifetime value to segment the market*”. Lendrevie, J. et al. (2015) develops this concept further, affirming that the most used segmentation criteria are divided in: demographic (e.g.: family characteristics, gender, age), socio-economic (e.g.: level of education, income, religion) and geographic (e.g.: region); personality and lifestyle; and psychologic attitudes regarding the product. Nonetheless, the authors argue that there is also a multi-criteria segmentation, which stands for combining specific criteria.

Socio-economic status influences dietary habits as well as human health, being occupation, education and income, the parameters most often used to define it (Vlismas, K. et al., 2009). The authors stand out occupation as a diet influencer, once environmental or social network can influence behavioral health habits.

The findings of an Australian survey aimed to analyze shopping time allocation of a male-female household are an example of the demographic characteristics’ analysis value (Vorobyev, K. et al., 2015), where it was realized that there is a tendency of women to perform the majority of the shopping trips concerning retailing (Blaylock & Smallwood, 1987), with a tendency to further increase that proportion (Dholakia, 1999), as age increases.

Also, Sommer, Wynes & Brinkley (1992) reinforced the importance of gender and age on shopping time, indicating that women and older people spend more time shopping than men and younger respondents (Vorobyev, K. et al., 2015).

A study¹¹ carried out on the Leicestershire population, in the UK, also resulted in outstandingly gender outcomes, overwhelming women with the responsibility on deciding what foods were purchased (76,6%) (Beardsworth, A. et al., 2002).

Still regarding gender differentiation importance, Belk & Costa (1998) consider chocolate as a female consumer good, arguing that self-proclaimed chocoholics are predominantly women (Barthel, 1989) and that women are more likely to receive chocolate as a gift than men (Lupton, 1996; Savel, 1977). Also, a study carried out in the Anglo-Saxon countries (Hamilton, 1992; Nuutall, 1988) concluded that women consume about twice as much chocolate as men (Belk & Costa, 1998). Additionally, women tend to discuss in greater detail the hedonic and emotional aspects of chocolate consumption than men (Belk & Costa, 1998).

Fischer & Arnold (1994) consider that gender affects consumer behavior in several decision moments, influencing specific usage patterns of a particular brand, product or service.

Older consumers' brand choices are different from younger consumers (Vlismas, K. et al., 2009). According to Writankar & Bhushan (2013), chocolate consumption is no longer either a luxury or restricted only to kids age group alone (Kulkarni, S., 2016).

Dibb (2001) claims that lifestyle-based segmentation techniques have increased in popularity (Quinn, L., 2009). However, Brown (1995), Charles (2002), Firat & Shultz (1997), Firat & Venkatesh (1993), Holt (1997), Kardon (1992), Sheth et al. (1999) and van Raaij (1993) highlight that market segmentation is becoming less effective and efficient since consumer lifestyles are becoming increasingly fragmented (Quinn, L., 2009).

Behavior regarding the product as a criteria aims to segment the customers, according to their consumption habits (e.g.: potential consumers, new consumers, regular consumers), their role in the decision-making process, the quantities consumed or their usage habits (Lendrevie, J. et al., 2015). A good segmentation must be related to customer needs, taking into account the factors which influence the consumer purchasing process (Rowley, 1997). Psychographics may capture some truth about real people's lifestyles, attitudes self-image and aspirations, but it is very weak at predicting what any of these individuals would be likely to purchase in any given product category, giving very poor insights to corporate decision makers regarding how to keep the customers they have or gain new ones (Yankelovich, D. et al., 2006).

¹¹ 421 interviewees (58% women; 42% men)

Calantone & Sawyer (1978) and Haley (1995) argue that segmentation by benefits sought provides deeper insights into the motivation and subjacent causes to consumption, offering more accurate forecasts of purchasing behavior (González-Benito, O. et al., 2014).

For all these reasons, it is essential to select the right segmentation criteria, appropriate to the company's goals and reality. In order to choose the most suitable one, Lendrevie, J. et al. (2015) advocate that the selected segmentation criteria must be relevant to the type of market, measurable and have operational value. Rowley (1997) adds that effective market segments should be identifiable, sufficiently large and accessible, with an appropriate marketing-mix.

3.2.3. Positioning concept

Kotler, Bowen & Makens (2005) define marketing positioning as *“the way a product is defined by consumers on important attributes – the place the product occupies in consumers' minds relative to competing products”* and Lovelock (1991) emphasizes that a positioning strategy should create *“a distinctive place in customer's minds”* (Chacko, H. et al., 2008: 226). Wang, H. (2015: 727) states brand positioning as a key tool for *“brand implementation in competitive markets”*, mentioning Aaker (1996), Hooley et al. (1998) and Kotler (2000).

Positioning is the key of the marketing-mix, ensuring its alignment (Lendrevie, J. et al., 2015), being a reliable and meaningful differentiator as well as an organization's growth enhancer, contributing to brand's competitiveness increase (Janiszewska, K. et al., 2012).

Lendrevie, J. et al. (2015) draw attention to the existence of two positioning dimensions: identification (the type of product category consumers should associate with each product) and differentiation (what distinguishes each product from the others in the same category), adding that there are four possible axes of differentiation: product attributes and performance; product/brand imaginary; target audience and consumption situations.

Kotler, P. & Armstrong, G. (2010) reinforce the role of the marketers, through outlining a value proposition able to describe which values will the company deliver to win target customers.

3.3. Marketing Mix

3.3.1. Marketing mix concept

Londhe, B. (2014) suggests marketing mix as a conceptual framework that identifies the main decisions managers should take to match their offerings with the consumers' needs, consisting on a set of marketing tools each company uses to implement its marketing strategy.

Borden firstly introduced the marketing mix concept back in 1953, identifying twelve variables (Constantinides, E., 2006). The author adds that the concept was later simplified to only four elements by McCarthy and termed as *The Four Ps* of marketing: product, price, promotion and place. Booms & Bitner (1981) suggested *The Seven Ps* in service marketing, adding the concepts of people, physical evidence and process (Hamid, A. et al., 2014).

Kotler & Keller (2012) argue that a product is either goods or services which are offered to satisfy a market demand, always based on its value proposition (Hamid, A. et al., 2014). Solomon (2011) enhances that today the product design is a key driver of its success or failure.

Lowe, B. et al. (2010) identify two main pricing strategies of innovation: penetration (low price as a reference) and skimming (high price as a reference). The authors also highlight the importance of customers' perceived value.

Kotler, P. & Armstrong, G. (2010) argue that companies must communicate the qualities and advantages of their products and services with their target customers, persuading and retaining them. Lendrevie, J. et al. (2015) identify the most used elements of the promotional mix: sales promotion; advertising; direct marketing; public relations; sponsorship and patronage; promotion; merchandising; and digital communication.

Finally, the variable place is related to the need of putting the products available at a convenient place for consumers access, through a certain distribution strategy (intensive distribution, selective distribution or exclusive distribution) (Lendrevie, J. et al., 2015).

3.3.2. The role of emotions

Patwardhan, H. (2013: 74) define "*emotional attachment as the degree of passion for a brand felt by a satisfied customer*". Branding literature has recently been focused on the role of emotions as a strength to leverage the connections of consumers to brands (Yoo & MacInnis, 2005). Deep psychological links with the brands lead to higher levels of competitive advantage, resulting in better performance (Malar et al., 2011, cited by Akgün, A. et al., 2013). Moreover, these emotional bonds result in "*increased commitment (Grisaffe and Nguyen, 2006), customer satisfaction (Bagozzi et al., 1999), loyalty and repurchase intention (Ersoy and Calik, 2010)*" (Akgün, A. et al., 2013: 504).

Solomon (2011) list love as one of the relationship types a person might have with a product (fetching emotional bonds such as warmth, passion, or other strong emotion).

Additionally, Thompson et al. (2006) (cited by Akgün, A. et al., 2013) state that companies should concentrate their efforts on building strong and meaningful emotional

linkages which enrich consumers' lives, inspiring their passion and becoming part of their memories, life stories, experiences and social networks.

3.4. Consumer behavior

3.4.1. Consumer behavior concept

Consumer behavior analysis is aimed to help improve business performance (Amit, G. et al., 2010). Kotler (1994) adds that organizations' mission is to deliver the desired satisfaction, preserving and enhancing the wellbeing of consumers and societies (Rowley, 1997).

In Solomon's perspective (2011: 33), "*consumer behavior is the study of the processes involved when individuals or groups select, purchase, use, or dispose of products, services, ideas, or experiences to satisfy needs and desires*", being an ongoing process which takes in account the issues that influence the consumer before, during and after a purchase. Solomon (2011) adds that the shopper might not be the same person as the user and that there might exist another person who act as an influencer, providing opinions and recommendations for or against certain products without buying or using them.

According to Lendrevie, J. et al. (2015), analyzing and understanding consumer behavior allows to identify their needs and secure customer satisfaction. The authors define the variables which influence consumer behavior as the following ones:

Table 1: Variables which influence consumer behavior

Individual explanatory variables	Permanent characteristics of individuals	Sociological and psycho-sociological explanatory variables
<ul style="list-style-type: none"> • Needs • Motivations • Attitudes 	<ul style="list-style-type: none"> • Character • Self-image • Lifestyle 	<ul style="list-style-type: none"> • Group (Norms, laws and behaviors; Reference groups; Opinion leaders) • Social class (Consumption mode; Conspicuous consumption; Purchase places; Social differentiation; Social mobility) • Cultural variables • Family (Family lifecycle; Familiar buying process)

Source: Lendrevie, J. et al. (2015) - adapted

Regarding lifestyle, it is considered that education is related to "*health outcomes through its influence on lifestyle behaviors (e.g.: exercise, diet), problem-solving capacity and values (e.g.: importance of preventive health behaviors)*" (Vlismas, K. et al., 2009: 55), appearing to be the strongest and most consistent predictor of "*unhealthy*" lifestyle behaviors.

Kotler (1994) reinforce that all the personal psychological senses of belief, learning, attitude and motivation influence the consumer's purchasing behavior (Srinivasan & Srivastava, 2010). Amit, G. et al. (2010: 58) add that consumer behavior is also affected by "*socioeconomic conditions like income, mobility and media access*".

Nonetheless, according to Lendrevie, J. et al. (2015), although these levels of analysis allow to better understand consumers' minds, they are insufficient to determine the individual's decision-making process. Solomon (2011) states that consumer behavior might be approached from two points of view: the consumer as a rational decision maker; and the subjective meaning of the consumer's individual experience.

3.4.2. The decision-making process

Consumers are influenced by multiple variables and there is not a single theory that covers all consumer decision-making aspects (Tsarenko & Strizhakova, 2015).

Rowley (1997) claims there are two relevant approaches to study consumer behavior: the buying decision-making process and the factors which affect the buying process. According to the author, although consumers look for the advantages and disadvantages of the products (what enhances the benefits sought importance), consumer decision making-process has a crucial role in determining purchase behavior.

Consumers' decision-making process initiates at the moment buyer realizes to have a need that is not satisfied (Amit, G. et al., 2010). In Rowley's perspective (1997), the purchase process begins several stages before the purchase itself, but not all decisions result in purchase.

Solomon (2011) states that market segmentation is an important aspect of consumer behavior, being possible to segment consumers according to many dimensions.

Rowley (1997) lists the factors, which affect the consumer buying process (summarized in Table 2): personal (associated with the individual and with the specific purchase decision); psychological (related to cognitive process, based on information, but influenced by perceptions); and social (because individuals do not operate alone in the decision-making process).

Table 2: Factors that affect the consumer buying process

Personal	Demographics	Gender, age, race, ethnicity, income, occupation, family life cycle
	Situational	External circumstances at the time of the purchase decision (e.g.: amount of time available for decision)
	Level of involvement	Level of interest; emotional commitment and time spent searching for a product
Psychological	Perception	Interpreting information inputs to produce meaning
	Motives and motivation	Internal energy-giving force which direct a person's activities towards satisfying a need
	Knowledge	Familiarity with product and expertise
Social	Attitude	Knowledge and positive or negative feelings about an object or activity
	Roles and family	Role is a set of actions and activities which a person in a particular position is supposed to perform (e.g.: wife, grandmother, part-time university student)
	Reference groups	E.g. (families, friends, religious...), being family the most influential reference group
	Social classes	Open group of individuals who have similar social rank
	Culture	Evident in everything which is made by human beings. Determines what people wear and eat, where they live and travel and other features of their lifestyle

Source: Rowley (1997) – adapted

Slama & Tashchian (1985) state that family life cycle acts as a summary variable capturing the combined effects of income, age and important events in life like marriage, birth of children, retirement, and death of spouse. They add that different stages of family life cycle will be involved in purchasing different types of products (Sridhar, G., 2007).

Age affects consumer's self-concept and life styles (Henry, 2000), determining the consumption of various products. In spite of age forms a part of one stage of family life cycle, yet it is itself an important factor for various products (Sridhar, G., 2007).

Regarding reference groups, also marketers recognize the importance of the family as the most influential, targeting them as a unit of consumption (O'Malley & Prothero, 2006). Family consumption remains an important issue with familial influence, having a pervasive influence on how individuals consume throughout its life course (Kerrane, B. et al., 2014).

According to Geuens, M. et al. (2002), children compose three different markets: a primary, a future and an influencer market (McNeal, 1992; Zollo, 1995), forming a huge secondary market by influencing family purchases (McNeal, 1998).

Solomon (2011) suggests several additional factors, including family structure, geography, lifestyles beyond demographics and product usage; also explaining that consumers need different products to help them play their various roles.

Cultural factors stand for the broadest and deepest influencer on consumer behavior (Amit, G. et al., 2010). Aligned, Ovaskainen, M. L. et al. (2006: 498) conclude that “*food consumption and food items at main meals and at snacks may differ by country*”. Bellisle et al. (2003) report that sweet bakery goods, other sweets and chocolate represent an higher energy contribution in snacks than in main meals (Ovaskainen, M. L. et al., 2006).

Additionally, Solomon (2011) advocate digital revolution as one of the most significant influences on consumer behavior, reminding that electronic marketing has increased convenience due to break down time and location barriers, also referring to the growing importance of virtual brand communities.

Amit, G. et al. (2010: 58) add that when consumers make food choice decisions, they appear to have much more pragmatic considerations, including “*sensory aspects of food (e.g., taste and quality) (Powell et al., 2003), but also the influence of non-food effects (e.g.: cognitive information, the physical environment and social factors) (Rozin & Tuorila, 1993; and Bell & Meiselman, 1995)*”. Amit, G. et al. (2010) state that as more resources become available, consumers may look for more emotional attributes in products or brands (Kim et al., 2002).

According to a study carried out on the Spanish consumers, “*tastes good*”, “*is good value for money*” and “*keeps me healthy*” were factors that stood out the most as conditions to their attitudes to food choice (Carrillo, E. et al., 2011).

Food choice factors can be divided into three main groups: the product related factors (physical or chemical properties of the food, nutrient content and sensory attributes); the consumer related factors (personality, social psychological factors, and physiological factors); and the environmentally related factors (economic, cultural and social issues) (Vabo & Hansen, 2014). The authors add that food choices might be affected by a large range of factors, such as “*food preferences, health, price, convenience, mood, sensory appeal, natural content, weight control, familiarity and ethical concerns (Steptoe et al., 1995)*” (Vabo & Hansen, 2014: 146).

According to Rowley (1997: 88), “*usage and loyalty are also important factors*”, the usage being categorized in terms of status (“*non-users, ex-users, potential users, first-time users and regular users*”) and usage rate (“*heavy, medium or light*”). In relation to loyalty, the author categorizes customers as “*hard core loyals (who buy the brand all the time); soft core loyals (who are loyal to two or three brands); shifting loyals (who move between brands); and switchers (with no loyalty to any specific brand)*” (Rowley, 1997: 89).

Regarding brand meaning, Gonzalez, S. J. (2014) argue that most of the clients purchased Nutella products at supermarkets and the typical usage situation were during

morning breakfast at home, evocating eventual associations with the brand past, especially in Italy, where the product has been consumed by different family's generations.

Morgan & Hunt (1994) declare that brand trust leads to brand loyalty or brand commitment, once trust creates exchange relationships that are highly valued (Chaudhuri & Holbrook, 2001). According to Ahmed, Z. (2014), brand trust is a promise of the brand with their customers to fulfill their expectations, where if brand fails to fulfill those promises, customer might probably move to the competitor brand product.

Additionally, Chaudhuri & Holbrook (2001) suggest that brand trust will contribute to purchase loyalty. Companies can build emotional trust if they are able to prove its brand is trustworthiness and friendly for the family use, meeting their expectations (Ahmed, Z. 2014).

Larzelere & Huston (1980) and Morgan & Hunt (1994) consider trust as a central element of any long-term relationship (Delgado-Ballester & Munuera-Alemán, 2001). Keller (1993) and Krishnan (1996) view it as a process by which individuals trust image attribution to the brand is based on his/her experience with that brand, which is therefore influenced by the consumer's evaluation of any direct (e.g.: trial, usage, consumption satisfaction) and indirect (advertising, word of mouth, brand reputation) contact with the brand (Delgado-Ballester & Munuera-Alemán, 2001).

Now marketers are much more attuned to the needs of different consumer groups, interacting with customers on a regular basis (Solomon, 2011). The author enhance that the web is transforming the way consumers interact with companies and with each other, also enabling customers to access product information where and when they want.

Database marketing is another emerging development, allowing to track specific consumer's buying habits very close and crafting products and messages tailored specifically to people's wants and needs (Solomon, 2011).

Amit, G. et al. (2010) suggest two types of purchase decisions that consumers might experience: "New Purchase" - purchases which are difficult to be make due to lack of confidence in decision-making; and "Repurchase" - purchases where consumer feels confident in decision-making since they have previous experience in purchasing the product.

Nevertheless, the decision making-process varies in different ways and times, depending on the type of purchase and approach, noting that different customers may use a different approach to the same product or service (Rowley, 1997):

- *Routine response behavior*: related to low-cost purchases, which involve little cost and decision effort;

Innovation in the positioning of Nutella

- *Limited decision making*: product bought occasionally; the shopper finds it necessary to collect information about an unfamiliar brand;
- *Extensive decision making*: unfamiliar, expensive or infrequent purchases
- *Impulsive buying*: unplanned.

Virvilaite, R. et al. (2009) state that impulsive buying represents more than 80% of all purchases in some goods' categories (Abrahams, 1997; Smith, 1996 based on Kacen & Lee, 2002), emphasizing that being able of stimulate consumers to buy impulsively in the current high competitor market may become a strong competitive advantage.

According to Virvilaite, R. et al. (2009: 101), "*impulsive purchasing behavior is named as deviation from standard and which explains a big sale of different goods every year (Hausman, 2000; Bellenger et al., 1978; Cobb & Hoyer, 1986; Han et al., 1991; Kollat & Willet, 1967; Rook & Fisher, 1995; Weinberg & Gottwald, 1982)*, being characterized as a behavior that appears as a consumer's response to a stimulus, experienced in the purchase environment and as an instant decision (completely underestimating the consequences of the buying), which results in emotional and/or cognitive reactions by the consumer after purchase. This behavior does not involve the rational decision making model of a consumer, as when the need comes up, a consumer buys impulsively and does not search for alternatives, being considered as *unplanned buying* (Parboteeah, 2005), since the consumer did not have the intention of purchase before visiting the purchase environment (Virvilaite, R. et al., 2009).

As reported by Virvilaite, R. et al (2009), scientists agree that impulsive behavior can be associated with hedonistic and emotional elements (Bayley & Nancarrow, 1998) and that the price of the good is also an important factor in impulsive buying (Parboteeah, 2005) since consumers tend to be impulsive during the sale season.

According to Kacen & Lee (2002), previous research conducted in the US and in the Great Britain named age as one of the many factors that influence impulsive buying behavior (Bellenger, Robertson & Hirschman, 1978; Wood, 1998). Additionally, Wood (1998) found an inverse relationship between age and impulse buying overall, registering an increase impulse buying between the ages of 18 and 39 and a declining thereafter. Kacen & Lee (2002) suggest that consumers learn to control their impulsive buying tendencies as they age.

Those studies also found out that pleasurable feelings led to increased unplanned spending (Dittmar et al., 1995) and that might be affected by social categories such as gender (Kacen & Lee, 2002).

Martínez & Montaner (2008) state that price is the decisive factor for some consumers, whereupon they focus their attention almost entirely on paying low prices, ignoring other

product attributes (González-Benito, O. et al., 2014). Sethuraman (2006) add that consumers who do not want to pay higher prices for manufacturer brands or who are not able to afford them, buy private label brands (González-Benito, O. et al., 2014).

According to Lichtenstein, D. R. et al. (1993), the pervasive influence of the price in the marketplace is unquestionable. On the one hand, higher prices negatively affect purchase probabilities, if stringently perceived as the amount of money that must be given up in a given purchase transaction. On the other hand, higher prices positively affect purchase probabilities, if consumers use the price as an indicator of product quality (Erickson & Johansson, 1985; Lichtenstein, Bloch & Black, 1988; Tellis & Gaeth, 1990; Zeithaml, 1988).

Price promotion is stated as one of the most often used instruments by marketing and sales managers to increase sales (Blattberg & Neslin, 1990; Low & Mohr, 1999; cited by Zoellner & Schaefer, 2015). Price promotions make consumers to accelerate their purchase decisions and also might increase category consumption (Nijs, V. R. et al., 2000). According to Raghurir & Corfman (1999), customers perceive an economic advantage when they purchase the promoted product (Zoellner & Schaefer, 2015).

3.4.3. Hedonic consumption

Hedonic consumption consists of *“those facets of consumer behavior that relate to the multi-sensory, fantasy and emotive aspects of one's experience with products.”* (Hirschman & Holbrook, 1982: 92), offering a complementary perspective to traditional consumer research.

McDonald (1998) says that the customer wants a good experience and a good emotional response or *hedonic* benefit from product usage, looking for enjoyment associated with a shopping experience and the subsequent use of a product (Tsarenko & Strizhakova, 2015).

Srinivasan & Srivastava (2010) show how the traditional philosophy highlights mass consumption, increasing the consumer base and gaining new customers, not properly taking into account the consumer's experience in mind.

There are many consumption acts which combine both utilitarian and hedonic motives: a typical utilitarian product may imply hedonic characteristics, as when a detergent promotion is based on its fragrance rather than its cleaning ability; and a typical hedonic product like chocolate can be consumed for its cardiovascular benefits (Alba & Williams, 2012).

According to Hirschman & Holbrook (1982: 93), *“emotions represent motivational phenomena with characteristic neurophysiological, expressive and experiential components (Izard & Beuchler, 1980), which include feelings such as joy, jealousy, fear, rage and rapture (Freud, 1955)”*. Hirschman & Holbrook (1982) stress that in some situations, emotions such as

love, hate or jealousy prevail over utilitarian motives in the products choice, based on deductive reasoning (Maslow, 1968; Dichter, 1960).

According to Levy's thought (1963), people buy products for what they *mean*, and not only for what they can *do* (Hirschman & Holbrook, 1982). Citing Levy (1959), Hirschman & Holbrook (1982) state that emotional involvement is related to the consumption of even the simplest of products like cigarettes, food and clothing.

Nutella is an example of a product that exceed its merely nutritional and energy-related value to enter into the hedonistic and emotive domains of personal well-being, being turned into material for dreams of both grown-ups and kids (Cova & Pace, 2006).

Alba & Williams (2012: 4) emphasize that "*when a product meets or exceeds utilitarian criteria, consumers experience satisfaction; when a product meets or exceeds hedonic criteria, consumers experience excitement and delight, become more loyal, and are more inclined to engage in positive word of mouth (Chitturi, Raghunathan, & Mahajan, 2008)*".

According to Solomon (2011), consumers increasingly want to buy things that will give them hedonic value in addition to the functional value, as they often believe that most brands performance is similar, so they weigh a product's aesthetic qualities heavily at brand selection.

Srinivasan & Srivastava (2010) add that experience generation leaves a mark in the consumers' minds through emotions, sensory inputs and relational recalls, also suggesting that the creation of these experiences does not necessarily require new tools (Holbrook and Hirschman, 1982), but a better application of the current technology to intensify the experience that consumers would get. Alba & Williams (2012) suggest that companies might promote hedonic qualities of their products that might result in customer excitement and delight increase.

Moreover, Srinivasan & Srivastava (2010) claim that creating a consumer relationship results in an exponentially profitable business model which is sustainable long term, across many business domains and customer types (Hirschman, 1992).

3.4.4. Habit concept

Wood & Neal (2009) argue that researching consumer habits is important in understanding consumer behavior, as routine is such a big part of daily life. By the same token, Quinn & Wood (2005) and Wood, Quinn, & Kashy (2002) show that "*45% of human behavior is repeated almost daily and usually in the same context*" (Wood & Neal, 2009: 579).

According to Shah, D. et al. (2014: 726), a habit is defined as a "*person's psychological dispositions to repeat past behavior*" and people who perform a certain behavior in a specific

situation (in a repeated way and with a satisfactory outcome) over time, become cognitively predisposed to repeat that behavior consistently whenever they encounter the same context.

A consumer satisfied with prior purchases of a brand tends to make a simpler decision, having minimal consideration regarding other brands at the purchase moment (Assael, 1987, cited by Shah, D. et al., 2014). The same authors also warn that the influence of habits on behavior might be amplified by other everyday demands such time pressures or personal situations. Yoon, C. et al. (2009) say that older consumers may be more susceptible to habitual behavior given their relative vulnerability to time pressure and search processes.

For example, according to Conner, Norman & Bell (2002), since eating is an act that people do every day and that, in most of the cases, meals are consumed at the same place and time day by day, eating behavior can be considered as habitual (Riet, J., et al., 2011).

Wood & Neal (2009) advocate that purchase and consumption have both a repeating pattern and that consumers are more likely to buy the same brands of products through different shopping occasions (Seetharaman, 2004), buy the same amounts at the habitual retail store in each visit (Vogel, Evanschitzky & Ramaseshan, 2008), and eat similar types of food at meals throughout the days (Khare & Inman, 2006).

Repeated consumer behavior is important not only for brand understanding but also for financial motives, as brought to mind by Wood & Neal (2009). Ehrenberg & Goodhardt (2002) and Wirtz, Mattila, & Lwin (2007) suggest that increases in repeated purchase and consumption are connected with increases in “*market share of a brand, customer lifetime value, and share of wallet*” (Wood & Neal, 2009: 579).

Wood & Neal (2009: 581) warn that consumer repetition might mean a “*continued preference for a particular product, a belief that it meets valued goals, or the experience of positive emotions*”. Citing MacInnis, Park & Priester (2009) and Oliver (1999), the authors advocate that brand loyalty and brand relationships can influence consumer behavior.

3.5. Conceptual framework of reference and hypothesis development

Research hypothesis must arise from the literature findings, based on the research goals, in order to fulfill those objectives. This chapter intends to summarize the main aspects obtained in the literature review.

Organizations need to “invest in different types of innovation”, since each type influence organizations differently and “achieve different outcomes and impacts” (Rowley, J. et al., 2011: 75). Innovation capability can be targeted in four main ways (Francis, D. et al., 2005; Tidd & Bessant, 2009):

- *Product innovation* - innovation to introduce or improve products that an organization offers.
- *Process innovation* - innovation to introduce or improve processes in the ways in which they are created and delivered.
- *Position innovation* - innovation to define or re-define the positioning of the firm or products, changing the context in which the products/services are introduced.
- *Paradigm innovation* - innovation to define or re-define the dominant paradigm of the firm, changing the underlying mental models which frame what the organization does.

Incremental innovation is an “add-on to a previous innovation without changing its essential concept” (Rowley, J. et al., 2011; 77). “A positional innovation does not significantly affect the composition or functionality of the product but the meaning of the product in the eyes of the targeted markets” (Francis, D. et al., 2005: 175).

Several authors argue that the market segmentation process involves three phases: “segmenting, targeting and positioning” (Dibb, S.; 2005: 14), wherein segmenting is the process of grouping customers with similar needs and characteristics, in which each group of consumers react in a similar way to a set of marketing stimuli (Lendrevie, J. et al., 2015). Targeting is related to the definition of relative attractiveness of the picked segments and positioning involves developing marketing mix strategies which are aimed to meet customers’ requirements in the targeted segments (Dibb, S., 2005).

Positioning is the key of the marketing mix, since it ensures that everything is aligned (Lendrevie, J. et al., 2015). Kotler, Bowen & Makens (2005) define marketing positioning as “the way a product is defined by consumers on important attributes – the place the product occupies in consumers’ minds relative to competing products” (Chacko, H. et al., 2008: 226).

Granot et al. (2010) say that consumers are influenced by multiple variables and there is not a single theory that covers all consumer decision-making aspects (Tsarenko & Strizhakova,

2015). Traditional consumer segmentation is at the heart of marketing practice (Rubison, 2014). Lendrevie, J. et al. (2015) affirm that the most used segmentation criteria are divided in: demographics (e.g.: family characteristics, gender, age), socio-economics (e.g.: level of education, income, religion) and geographic (e.g.: region); personality and lifestyle; behavior regarding the product; and psychological attitudes regarding the product.

Food choice factors can be divided into three main groups: the product related factors; the consumer related factors and the environmentally related factors (Vabo & Hansen, 2014).

Socio-economic status influences dietary habits as well as human health, being occupation, education and income the parameters most often used to define it (Vlismas, K. et al., 2009). The authors stand out occupation as a diet influencer, once environmental or social network can influence behavioral health habits.

As aforementioned, socio-demographic characteristics are considered as the basic influencers of consumers' decision making-process.

H1: Nutella consumers profile is influenced by socio-demographic characteristics

Based on the literature, they were selected six characteristics to study: gender; age; level of education; occupation/professional activity; household composition (regarding family characteristics); and income (measured in terms of monthly gross household income).

On the other hand, the shopper might not be the same person as the consumer (Solomon, 2011).

H2: Nutella shoppers profile is influenced by socio-demographic characteristics

Wood & Neal (2009) argue that researching consumer habits is important in understanding consumer behavior, as routine is such a big part of daily life. According to Conner, Norman & Bell (2002), eating behavior can be considered as habitual, since eating is an act that people do every day (Riet, J. et al., 2011).

Rowley (1997) listed some factors which affect the consumer buying process, dividing them into: personal (associated with the individual and with the specific purchase decision); psychological (related to cognitive process, based on information, but influenced by perceptions); and social (since individuals do not operate alone in the decision-making process). Regarding the psychological characteristics, the author includes consumer motives.

H3: Shoppers motives to buy Nutella are influenced by socio-demographic characteristics

Hedonic consumption consists of “*those facets of consumer behavior that relate to the multi-sensory, fantasy and emotive aspects of one's experience with products*” (Hirschman & Holbrook, 1982: 92). According to Levy's thought (1963), people buy products for what they *mean*, and not only for what they can *do* (Hirschman & Holbrook, 1982).

Malar et al. (2011) affirm that deep psychological links with the brands lead to “*increased commitment (Grisaffe and Nguyen, 2006), customer satisfaction (Bagozzi et al., 1999), loyalty and repurchase intention (Ersoy and Calik, 2010)*” (Akgün, A. et al., 2013: 504).

MacInnis, Park & Priester (2009) and Oliver (1999) advocate that brand loyalty and brand relationships can influence consumer behavior (Wood & Neal, 2009).

Morgan & Hunt (1994) declare that brand trust leads to brand loyalty or brand commitment, since trust creates exchange relationships that are highly valued (Chaudhuri & Holbrook, 2001). According to Ahmed, Z. (2014), brand trust is a promise of the brand with their customers to fulfill their expectations.

Consumers appear to have much more pragmatic considerations when making food choice decisions, including “*sensory aspects of food (e.g., taste and quality), but also the influence of non-food effects (e.g.: cognitive information, the physical environment and social factors)*” (Amit, G. et al., 2010: 58).

Vabo & Hansen (2014: 146) add that food choices might be affected by a large range of factors, such as “*food preferences, health, price, convenience, mood, sensory appeal, natural content, weight control, familiarity and ethical concerns (Steptoe et al., 1995)*”.

According to a study carried out on the Spanish consumers, “*tastes good*”, “*is good value for money*” and “*keeps me healthy*” were factors that stood out the most as conditions to their attitudes to food choice (Carrillo, E. et al., 2011).

It is stated that impulsive buying represents more than 80% of all purchases in some goods' categories, being characterized as a behavior that appears as a consumer's response to a stimulus, experienced in the purchase environment and as an instant decision (completely underestimating the consequences of the buying) (Virvilaite, R. et al. 2009). Also, scientists agree that the price of the good is an important factor in impulsive buying (Parboteeah, 2005) since consumers tend to be impulsive during the sale season (Virvilaite, R. et al. 2009).

Martínez & Montaner (2008) state that price is the decisive factor for some consumers, whereupon they focus their attention almost entirely on paying low prices, ignoring other product attributes (González-Benito, O. et al., 2014). According to Lichtenstein, D. R. et al. (1993), the pervasive influence of the price in the marketplace is unquestionable.

Price promotion is stated as one of the most often used instruments to increase sales (Zoellner & Schaefers, 2015). Price promotions make consumers to accelerate their purchase decisions and also might increase category consumption (Nijs, V. R. et al., 2000). According to Raghurir & Corfman (1999), customers perceive an economic advantage when they purchase the promoted product (Zoellner & Schaefers, 2015).

From the several factors mentioned in the literature and summarized above, the following were highlighted, to be evaluated as potential motives to buy Nutella: *brand trust*; *impulse / “spur of the moment”*; *price*; *sale price* and *taste*:

H3 a) *Brand trust* is influenced by socio-demographic characteristics

H3 b) “*Spur of the moment*” is influenced by socio-demographic characteristics

H3 c) *Price* is influenced by socio-demographic characteristics

H3 d) *Sale price* is influenced by socio-demographic characteristics

H3 e) *Taste* is influenced by socio-demographic characteristics

It has been considered that there might be some differences between shoppers who buy Nutella and those who do not. From the list mentioned above, impulse or “spur of the moment” purchases by shoppers who do not ordinarily purchase the product has been challenged as a motive and as such has been removed from further analysis. To conclude, *brand trust*; *taste*; *price*; *health* and *allergies* have all been assumed to be potential motives not to purchase Nutella.

In order to identify potential differences that might exist between those who do not buy Nutella and those who do not consume it, the same variables have been considered after excluding the *brand trust* variable.

H4: Motives to not consume Nutella are influenced by socio-demographic characteristics

H4 a) *Taste* is influenced by socio-demographic characteristics

H4 b) *Price* is influenced by socio-demographic characteristics

H4 c) *Not healthy* is influenced by socio-demographic characteristics

H4 d) *Calories* is influenced by socio-demographic characteristics

H4 f) *Allergies* is influenced by socio-demographic characteristics

Bellisle et al. (2003) report that sweet bakery goods, other sweets and chocolate and alcoholic beverages represent a higher energy contribution in snacks than in main meals (Ovaskainen, M. L. et al., 2006). Nonetheless, the authors stress that “*food items at main meals and at snacks may differ by country*” (Ovaskainen, M. L. et al., 2006: 498).

Gonzalez, S. J. (2014) argues that most of the clients purchased Nutella products at supermarkets and the typical usage situation were during morning breakfast at home, evoking eventual associations with the brand past, especially in Italy, where the product has been consumed by different family’s generations.

H5: Typical usage situation of Nutella is at breakfast

Nutella is an example of a product that exceeds its merely nutritional and energy-related value to enter into the hedonistic and emotive domains of personal well-being, being turned into material for dreams of both grown-ups and kids (Cova & Pace, 2006).

H6: Nutella is a cross-generations product

Marketers recognize the importance of the family as the most influential reference group, targeting them as a unit of consumption (O’Malley & Prothero, 2006). Family consumption remains an important issue with familial influence, having a pervasive influence on how individuals consume throughout its life course (Kerrane, B. et al, 2014).

H7: Nutella consumption is influenced by the family

4. Methodology

4.1. Research methods

The research methods selected were exploratory and descriptive.

It was exploratory because it took place a field study on something concrete never done before, aiming to gather preliminary data concerning motivation towards purchase and consuming habits, that will allow to generate hypothesis (Reto & Nunes, 1999). Exploratory studies are intended to increase knowledge regarding the field of study, such as pilot or preliminary studies, which are used to test a methodology or provide estimates, before a larger study (Gray, J. et al., 2016), as it was the case of the present study.

According to Reto & Nunes (1999), a descriptive method intends to characterize the current status of a certain research object, implying data collection, where *“the main goal is to define a situation to prepare other heuristic evaluation processes”* (Reto & Nunes, 1999: 25). The same authors add that this method is most commonly used to *“answer questions never formulated before or to collect inexistent information regarding a certain research object”* (Reto & Nunes, 1999: 29).

In relation to the goal, this research can be classified as evaluative-research, concerning alternative verification in order to make a decision about possible future marketing strategies.

During the research, it was considered as primary and secondary data (both qualitative and quantitative). Secondary data was analyzed and collected online, regarding Ferrero Group and Nutella itself. In order to ensure value and applicability, meetings with the Ferrero Iberian Managing Director, Mr. Max de Simone, took place, in order to collect information, insights and feedback related to the topic. Regarding quantitative approach, Nielsen data was used, mostly facilitated by Ferrero, which was significantly helpful and made it possible to properly contextualize the problem with market data.

In relation to primary quantitative data, aligned with the descriptive method mentioned, it was elaborated a well-structured survey to formulate the main research instrument, to be administered online. According to Bressan, G. et al. (2012: 137), the questionnaire used in a survey can be defined as *“a set of questions on a topic that does not test the ability of the respondent, but measures their views, their interests, personality traits and biographical information”*. The choice fell on this option due to the capability to reach more participants, overcome distances, and due to the convenience of having computerized data collection, which reduces time, costs and effort (Wright, K., 2005). Regarding response rate, an online survey also provides the highest level of convenience for the respondents because they can answer the

questionnaire according to their own pace, chosen time, and preferences (Gillham, B. 2007), improving the chances of more people answering it.

There are two methods of marketing research which might be implemented in conducting online surveys: qualitative and quantitative (Bressan, G. et al., 2012). Qualitative research studies the market characteristics through exploratory contexts of decision making, being an exploratory type of research, which allows to collect subjective aspects of individuals' thoughts and behaviors, through inserting his or her opinion within the questionnaire, if an open editing field is provided. On the other hand, quantitative research measures and quantifies the market data through straightforward and easily quantified questions, and might also be used to measure commitment, attitudes and customer satisfaction (Bressan, G. et al., 2012).

The current study implemented both qualitative and quantitative research, offering single and multiple choices and also providing editing fields.

Researching consumer habits is important in understanding consumer behavior, as routine is such a big part of daily life (Wood & Neal, 2009). According to Conner, Norman & Bell (2002), since eating is an act that people do every day and that, in most of the cases, meals are consumed at the same place and time day by day, eating behavior can be considered as habitual (Riet, J., et al., 2011).

Considering this literature findings, the survey intended to understand purchasing and consumption habits of the sample, including competitor's comparison (regarding other spreadable creams such as jam and butter), also focusing on what might be the motives behind those behaviors, being exclusively aimed to Portuguese people, and thus written in Portuguese.

At the beginning of the survey, a brief introduction was provided, containing a cooperation request (informing the estimated time needed), the reason of its applicability, a brief description of the survey nature, the institution name and a formal statement of its anonymously (Hill & Hill, 1998).

Sections were defined according to the hypothesis, coming up with the following:

- I. Purchase habits of spreadable creams
- II. Consumption habits of spreadable creams
- III. Consumption habits of spreadable creams at breakfast
- IV. Socio-economic characterization

The section headings refer to spreadable creams instead of Nutella itself, although the majority of the questions is concerned with Nutella, in order to not bias the questions which involve other spreadable creams as a possibility.

Regarding scales, nominal and range scales were used, specifically a Likert-type scale of 5 points, aiming to measure the importance of each presented motive from 1-“Not at all important” to 5-“Extremely important”. Nominal scales are qualitative and can be binary (e.g.: yes/no) but also mutually exclusive (e.g. female/male) or not-exclusive, allowing multiple answer selection, where it is crucial to mention precise instructions (Hill & Hill, 1998).

In order to measure cases characteristics, two options can be considered: exact values or categories (Hill & Hill, 1998). For this study, it was chosen to measure those characteristics in categories, such as age and monthly gross household income.

4.2. Survey pretest

According to Presser, S. et al. (2004), pretesting is the only method to evaluate in advance if a questionnaire causes misunderstandings, ambiguities, or other difficulties with instrument items to respondents, called “problems”, considering it as an indispensable tool (based on elementary textbooks and experienced researchers’ statements).

Tull & Hawkins (1976) recommend that the pretest “*must use respondents who are as similar as possible to the target respondents*” (Hunt, S. et al., 1982: 270). Regarding pretest sample size, the same authors conclude that the unanimity notwithstanding, there are motives for believing that the pretest sample size is not fixed, but should be a function of the instrument and the target population. Zaltman & Burger (1975) argue that the sample should be “small” and Ferber & Verdoom (1962) suggest that a sample of 12 is satisfactory (Hunt, S. et al., 1982).

This way before launching the online surveys, a pretest took place for 15 people from all the studied age groups, from both genders. The respondents were asked to evaluate the questionnaire after completing the survey.

This pretest was very useful since respondents provided valued inputs such as: questions clarification to ensure that every word was understandable, sections’ division reinforcement, survey flow revision, typographical errors identification, multiple versus single answers suggestion, suitable answers for all types of respondents, suggestions of further response options and potential embarrassing questions that could lead to incompleteness of the survey.

After all the changes were performed, a final test was conducted with 3 individuals who had not answered the survey yet in order to complete it fully and check that no more changes would be needed.

The final version of the survey is presented in the Appendix 2, in Portuguese. Since it was an online survey, there were some questions that were automatically filtered, being presented according to respondents previous answers. On the attached, the filtered questions are indicated.

4.3. Online survey design

The survey was completed via “Qualtrics Survey Software” and it was divided in the four sections previously mentioned. In order to ensure the survey flow was adapted to every kind of respondents’ profile, it was used “display logic” and “skip logic”, showing the following question conditionally, based on previous answers (as mentioned above).

In the interest of understanding the factors behind decision making process, spreadable creams shoppers were asked to evaluate their motives to buy or not to buy Nutella (according to their previous answers) through a Likert scale measuring the importance of each motive (from 1-“Not at all important” to 5-“Extremely important”). In order to get the same kind of insights regarding consumers’ motivations to not consume Nutella, the same logic was applied through a Likert scale (only to non-consumers). Lastly, all the respondents evaluated their motives either to consider or not consider Nutella good for breakfast, through the same Likert scale. A few motives were presented to each question, although there was always also an optional open editing field, identified as “other”, to provide the possibility to add whatever respondents would consider more appropriate to them.

The first section questions started by identifying spreadable creams shoppers and which spreadable creams were bought. This question includes spreadable creams broad category¹², instead of exclusively including the chocolate spreads category, once it was considered that all spreads are Nutella competitors at the decision moment of spread something on a serving combination such as bread or a crepe. The spreads proposed were mostly based on the ones highlighted as the most consumed by Portuguese families, on a market study by Ipsos Portugal (2014), facilitated by Ferrero (Graphic 2).

If Nutella was not chosen in the mentioned question, the respondents were asked to explain their motives to not buy it (as previously explained) and then the software would guide them to the next section. If Nutella was chosen, the respondents answered questions regarding Nutella purchase habits (frequency and packing size), their motives to buy it, the end use purpose (breakfast, afternoon snack, desserts...) and the consumer type (adults and/or children).

The second section aimed to identify Nutella consumers and their consumption habits regarding frequency, consumption moment of the day, serving combination (bread, crepe...) and place. The respondents who did not consume Nutella were asked about their motives to not consume it, then guided to the following section.

¹² explained previously at chapter 2. Definition of the problem context

The third section aimed to understand, firstly, breakfast consumption habits and, in the second place, Nutella consumption habits at breakfast. To gather answers for the first goal, questions were given regarding usual breakfast context (place, companion), family breakfast frequency and breakfast composition. If bread or toast was part of a respondents' breakfast composition, they were asked what to put on it from spreadable creams, ham and cheese. The spreads presented were the same that previously were presented as purchased options. Regarding the second goal, if respondents had declared in the second section that they used to consume Nutella at breakfast (and only in this situation), a few questions related to Nutella consumption habits (frequency and serving combination) were given, but regarding breakfast.

Then, all Nutella consumers were asked if they considered Nutella ideal for consumption at breakfast, after being asked about their motives either to consider or not to consider it ideal for consumption at breakfast.

Afterwards, in order to draw respondents' profile, they were asked questions regarding their socio-economic field. They were considered the variables highlighted in the literature, being adapted: gender, age, education level, professional activity, total household composition and gross monthly household income. Age options were divided in "Younger than 18", "18-35", "36-55" and "Older than 55", according to Ferrero age segmentation.

Once a Nutella shopper might not be a Nutella consumer, they were also asked the age of those consumers for whom they made the purchase. For all Nutella shoppers who were also Nutella consumers, it was also asked the age of the other consumers of it (if applicable).

Those age options were defined partly following Ferrero age segments guidance: "18-35"; "36-55"; "Older than 55". However, instead of using their age segment of "Younger than 18", it was split in "3-5"; "6-10" and "11-17", in order to get more specific insights once eating habits and preferences differ a lot from one of these age groups to the another.

Regarding monthly gross household income options, there were chosen: "0€-500€"; "501€-1000€"; "1001€-1500€"; "1501€-2000€", "2000€-2500€" and "+2500€", based on the percentage of households by income brackets (2013)¹³. This question was optional to avoid uncomfortable situations typically related to the disclosure of income earned, what could lead to non-completion of the survey.

Survey was released through social networks (Facebook and LinkedIn), being posted at certain groups and also sent via private messages. The survey was also sent via e-mail to several

¹³ Source: Por data - Households by income brackets
<http://www.pordata.pt/Portugal/Agregados+familiares+por+escal%C3%B5es+de+rendimento+IRS+Modelo+1-80> [Accessed 18 July 2016]

contacts. Additionally to the cooperation request to fill in the survey, it was also asked if they could ask other people to fill in the survey as well.

4.4. Sampling method

The sampling method should be chosen taking into account the goals and constraints of the study and the representativeness of the sample to be able to generalize the results of the investigation to the entire population. From the diverse existing sampling methods, random sampling is the one that allows a better control of the sampling error, being preferable when extrapolating the results to the universe from the sample with confidence (Cochran, W. 1977)

However, convenience and snowball methods were chosen because convenience sampling allows to select cases easier to reach, being more cooperative (Farrokhi, F. et al., 2012) and snowball sampling allows to reach more people through asking respondents to ask other people with certain characteristics to fill in the survey as well (Gile & Handcock, 2011).

The chosen methods are not adequate to make generalizations, once they give rise to nonprobability samples (Wright, K., 2005).

4.5. Data processing

They were collected 705 answers, although only 607 were valid. The survey was active between 16th of July and 13th of August of 2016.

The intended target was extensive, once Nutella touch families in general, reaching different generations and genders. This way, it tried to reach a diverse range of people.

All data was collected via internet through the link generated by Qualtrics Survey Software: https://iscteul.co1.qualtrics.com/SE/?SID=SV_9MLQnpfG67EgCtT.

In order to analyze survey data, the SPSS (*statistic package for social sciences*) software version 23 was used.

Nominal variables provide data in frequencies so that nonparametric techniques are the most indicated statistical analysis (percentages, means, chi-square) (Hill & Hill, 1998). Range scales, where Likert scale is included, can be measured both through parametric and nonparametric techniques, although the first ones allow to obtain more information.

Regarding nominal variables, the most used statistical analysis were frequencies and percentages in order to understand the number of responses in each category scale and though take conclusions, being mainly used regarding sample characterization (e.g.: percentage of women, Nutella shoppers, Nutella consumers, each age group...). In order to strengthen the analysis, it was used *crosstabs*, SPSS tool that cross frequencies of two variables measured by

nominal scales, presenting them in a table in a matrix format that displays the frequency distribution of the variables. Both mentioned analysis offer insights through descriptive analysis. Cross tabulations can provide richer insights from the combined variables, allowing to understand respondents most frequent actions regarding a certain situation or the weight of a certain respondents' characteristic. For example, it not only allows to understand what might be the most often consumption frequency, but also which age group lead that frequency.

However, it is also possible to calculate other type of statistical analysis with *crosstab*, such as the *Pearson Chi-Square* test, which analyze the dependency relationships between variables. This test determines if two discrete variables are associated: if there is an association, the distribution of one variable will differ depending on the value of the second variable; if the two variables are independent, the distribution of the first variable will be similar for all values of the second variable. Summarily, there is a significant association between both variables (with a significance level $\alpha = 0,05$), if $p \leq 0,05$, proving its dependence relationship.

Regarding the multiple response questions type, although the most used statistical analysis was also frequencies and percentages, it was needed to define previously a new variable set for each one, agglomerating all the possible options, in order to get the global perspective. This way, the frequencies table is given regarding the number of the cases but also regarding the number of the responses, allowing to understand each variable weight in view of total respondents and total answers (once each respondent could pick more than one option).

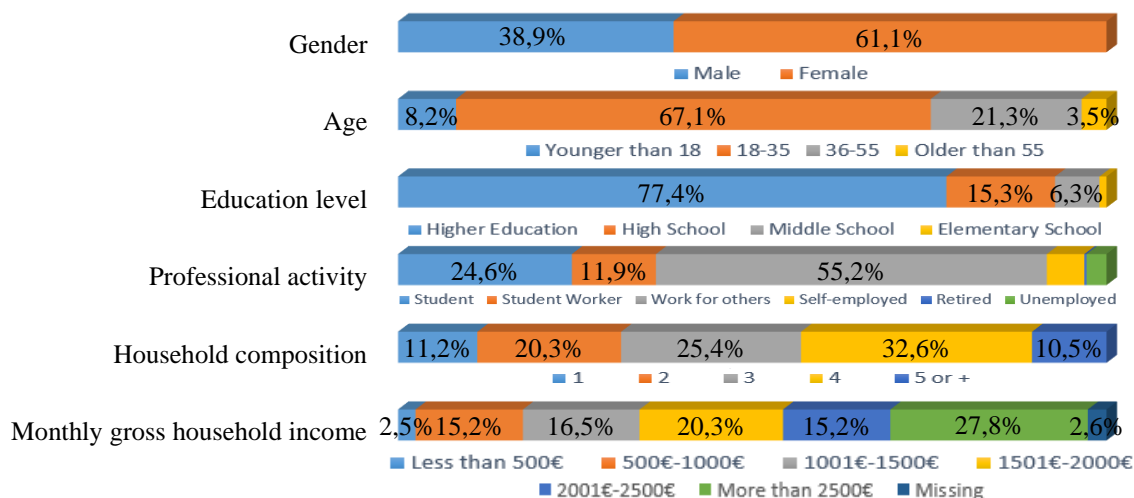
Although it is possible to originate cross tabulations from multiple response questions, there are limitations regarding correlation tests, preventing it of further analysis.

About Likert scales, *mean* is not good as a measure of central tendency since it has no meaning, being the most appropriate measure of it the mode, the most frequent responses, or the median (Jamieson, S., 2004). In this study, coefficient of variation was calculated for each variable measured by a Likert scale, where most of the results were above 0,5, reinforcing this premise. This way, it was selected the most frequent responses as Likert scale analysis.

5. Survey results

5.1. Socio-demographic characterization of the sample

Graphic 6: Sample characterization



Sample characterization is summarized above in Graphic 6. It was composed by 607 respondents: 61,1% of women and 38,9% of men.

The most representative age group were between 18 and 35 years old (67,1%). 21,3% were between 36 and 55 and 8,2% were younger than 18 years old.

Regarding education level, 77,4% of the respondents concluded higher education and 15,3% only concluded high school.

Concerning activity type, 55,2% of the respondents worked for others, 24,6% were students and 11,9% were student workers.

Moreover, 32,6% of the respondents belonged to a household of 4 people in total, 25,4% to a household of 3 people in total and 20,3% to a household of 2 people in total. On average, respondents' household is composed by 3,11 people (above national average = 2,6¹⁴).

27,8% of the respondents' household earned more than 2500€ gross monthly. 20,3% of respondents' household income is between 1501€ and 2000€ and 16,5% of the respondents' household income is between 1001€ and 1500€. 2,6% of the sample did not answer this question once it was optional.

¹⁴ Source: Por data - Average size of families

<http://www.pordata.pt/Portugal/Dimens%C3%A3o+m%C3%A9dia+das+fam%C3%ADlias+segundo+os+Censos+-+908> [Accessed 17 April 2016]

5.2. Descriptive characterization of survey results

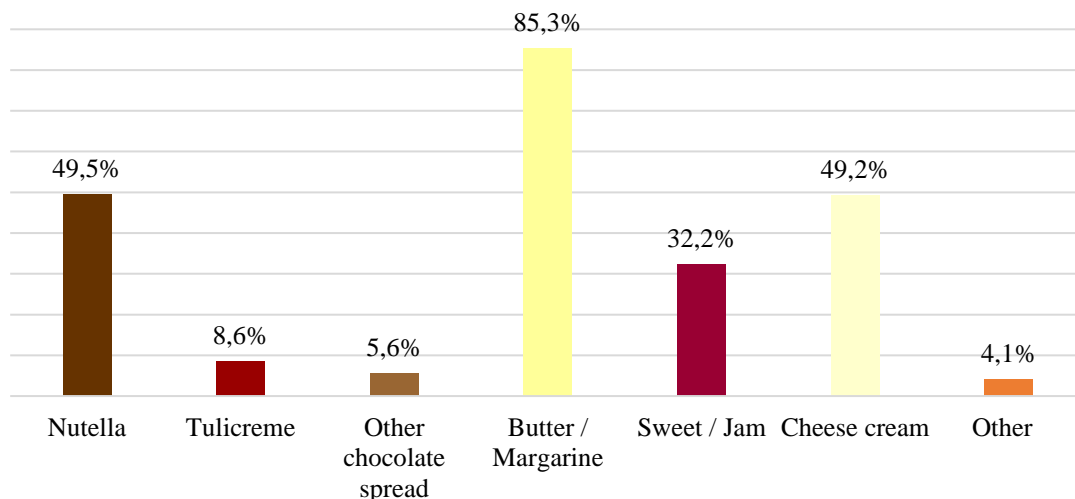
I - Purchase habits of spreadable creams

a) Spreadable creams shopper characterization

Out of the 607 total respondents who fully answered the survey, 64,9% were spreadable creams shoppers (67,8% of women; 32,2% of men), mostly between 18 and 35 years old (67,3%) (Appendix 3 - Table A, Table B and Table C). Although the sample was mostly composed by women, spreadable creams women shoppers' percentage was even bigger.

As described below in Graphic 7, within the segment of spreadable creams shoppers, 85% used to buy *butter*, 49,5% assumed to buy *Nutella* and 49,2% *cheese creams*. *Tulicreme* only represented 8,6% of the preferences, slightly above *other spreadable chocolate creams*, which got 5,6% of weight (mostly regarding brands' distributor). From the open question *other*, *peanut butter* was the spreadable cream most mentioned.

Graphic 7: Spreadable creams purchased



Data retrieved from Appendix 3 - Table D.

Although only 49,5% of the spreadable creams shoppers used to buy Nutella, 59,1% of the spreadable creams shoppers used to consume it (so some of the respondents consumed it even if they didn't buy it) (Appendix 3 - Table E).

b) Nutella shoppers' characterization

Nutella shoppers represented 32,1% of all sample (Appendix 3 - Table F), being composed by 195 respondents (64,9% of women; 35,1% of men), what means +3,8% of women versus all sample (Table 3).

Table 3: Comparison of gender distribution between *Nutella shoppers* and *All respondents*

	Gender		Total
	Female	Male	
Nutella shoppers	64,9%	35,1%	100,0%
All respondents	61,1%	38,9%	100,0%

Data retrieved from Appendix 3 - Table G and Graphic 6.

Although there are more females in general, comparing males who are spreads shoppers with males who purchase Nutella, the percentage of males is bigger (+2,9% versus all spreads shoppers) (Table 4).

Table 4: Comparison of gender distribution between *Nutella shoppers* and *All spreadable creams shoppers*

	Gender		Total
	Female	Male	
Nutella shoppers	64,9%	35,1%	100,0%
All spreadable creams shoppers	67,8%	32,2%	100,0%

Data retrieved from Appendix 3 - Table G

Comparing age group distribution of Nutella shoppers with the sample, “18-35” and “Younger than 18” age groups were better represented (+1,6% and +4,1% respectively). Oppositely, “36-55” and “Older than 55” were less represented (-2,8% and -3% respectively) (Table 5).

Table 5: Comparison of age group distribution between *Nutella shoppers* and *All respondents*

	Age				Total
	Younger than 18	18-35	36-55	Older than 55	
Nutella shoppers	12,3%	68,7%	18,5%	0,5%	100,0%
All respondents	8,2%	67,1%	21,3%	3,5%	100,0%

Data retrieved from Appendix 3 - Table H and Graphic 6

When comparing Nutella shoppers with spreads shoppers, difference is more substantial in regard to 36-55 age group (-4,3% versus -2,8%).

Regarding education level, Nutella shoppers were more represented by *Middle school* and *High school* levels of education versus all sample, and less represented by *Higher education* (Table 6).

Table 6: Comparison of education level distribution between *Nutella shoppers* and *All respondents*

	Education level				Total
	Elementary School	Middle School	High School	Higher Education	
Nutella shoppers	1,0%	7,7%	18,5%	72,8%	100,0%
All respondents	1,0%	6,3%	15,3%	77,4%	100,0%

Data retrieved from Appendix 3 - Table I and Graphic 6

Concerning professional activity type, Nutella shoppers are more represented by students versus all sample (+4,6%) (Table 7).

Table 7: Comparison of professional activity distribution between *Nutella shoppers* and *All respondents*

	Professional activity					Total
	Student	Student worker	Worker for others	Self-employed	Unemployed	
Nutella shoppers	29,2%	9,2%	53,3%	4,6%	3,6%	100,0%
All respondents	24,6%	11,9%	55,2%	5,3%	2,8%	100,0%

Data retrieved from Appendix 3 - Table J and Graphic 6

Household composition analysis shows great differences among Nutella shoppers and all respondents, having the most difference regarding household composed by 1 single person (-19%). Although the sample is mostly composed of households of 4 people, that weight is even more relevant for Nutella shoppers (+8,4%) (Table 8).

Table 8: Comparison of household composition distribution between *Nutella shoppers* and *All respondents*

	Household composition					Total
	1	2	3	4	5+	
Nutella shoppers	5,6%	17,4%	22,6%	41,0%	13,3%	100,0%
All respondents	24,6%	20,30%	25,40%	32,60%	10,50%	100,0%

Data retrieved from Appendix 3 – Table K and Graphic 6

Comparing the same variable but with spreadable creams shoppers, reality is more alike, however there is still a tendency to have Nutella shoppers better represented by household composition of 4 and 5 or more people than the total spreadable creams (Table 9).

Table 9: Comparison of household composition distribution between *Nutella shoppers* and *All spreadable creams shoppers*

	Household composition					Total
	1	2	3	4	5+	
Nutella shoppers	5,6%	17,4%	22,6%	41,0%	13,3%	100,0%
All spreads shoppers	8,9%	21,1%	25,1%	34,3%	10,7%	100,0%

Data retrieved from Appendix 3 – Table K

There are no significant differences among income distribution (Table 10).

Table 10: Comparison of monthly gross household income distribution between *Nutella shoppers* and *All respondents*

	Monthly gross household income						Missing	Total
	Less than 500€	500€-1000€	1001€-1500€	1501€-2000€	2001€-2500€	More than 2500€		
Nutella shoppers	3,2%	14,7%	15,3%	24,2%	15,8%	26,8%	0%	100,0%
All respondents	2,5%	15,2%	16,5%	20,3%	15,2%	27,8%	2,6%	100,0%

Data retrieved from Appendix 3 – Table L and Graphic 6

From Nutella shoppers, only 97,4% consumed it (so 2,6% bought it for others to consume) (Appendix 3 – Table M).

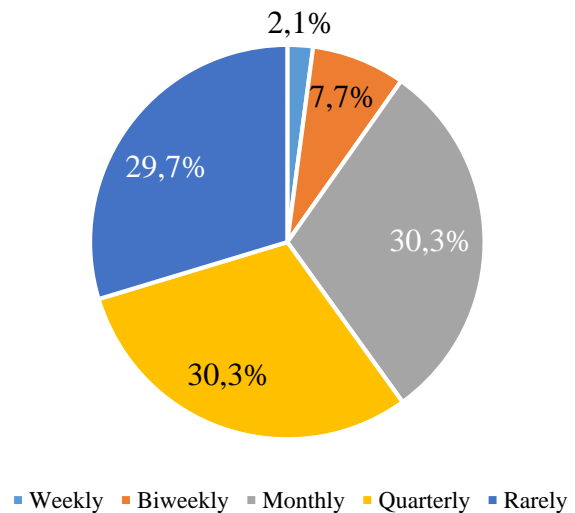
c) Nutella purchase frequency

Looking at Nutella purchase frequency, 30,3% of the respondents assumed to buy it *monthly*, 30,3% to buy it *quarterly* and 29,7% only *rarely* (Graphic 8).

Regarding Nutella purchase frequency by age group, it was dominated by 18-35 age group (68,7%), who used to buy it either *quarterly* (34,3%), *rarely* (30,6%) or *monthly* (29,9%). 36-55 age group (who represented 18,5%) bought Nutella mostly *monthly* (38,9%) (Appendix 3 - Table N).

Findings for Nutella purchase frequency by gender reveal that men were the ones who used to buy it mostly *weekly* and *biweekly*, whilst women used to buy it more *monthly*, *quarterly* and *rarely* (Appendix 3 - Table O).

Graphic 8: Nutella purchase frequency



Innovation in the positioning of Nutella

Crossing purchase frequency with household gross income, *biweekly* purchases were mainly done by “1001€-1500€” (33%) and “More than 2500€” (33%). *Monthly* purchases were mostly done by “1500€-2000€” (32,8%) and *quarterly* purchases were mainly done by “More than 2500€” (34,5%) (Appendix 3 - Table P).

Nutella purchase was mostly made by households of 4 people (41%), 22,6% by households of 3 people and 17,4% of 2 people. Households composed of 1 and 2 people followed the same tendency, buying usually *rarely* and *quarterly*. Households composed of 3 people bought it mostly *monthly* (43,2%) and *quarterly* (29,5%), being the household composition who bought it more often. Household composed of 4 and 5 or + people usually bought it both *monthly*, *quarterly* and *rarely*, weighting more *monthly* regarding 4 people household and *quarterly* regarding 5 or + people household (Appendix 3 - Table Q).

d) Nutella package type

Regarding the package type bought, 68,7% opted for the 400g package (Graphic 9). Through crossing information related to the package type purchased with Nutella purchase frequency, it was concluded that cup 200g was more often chosen when Nutella purchase was usually *rare* (37,5%), followed by a *monthly* purchase (28,6%). The most bought package (400g) highlighted to be chosen by the majority for *quarterly* (34,3%), *rarely* (29,1%) and *monthly* (27,6%) consumption (Appendix 3 - Table R).

Graphic 9: Purchase preferences of package type



e) End use of Nutella purpose

When asked about Nutella consumption purpose, snacking led the results with 71,8% of respondents preferences, followed by light snacks (43,6%). One third of the respondents chose Nutella for breakfast, regarding purpose consumption at purchase moment (32,8%) (Appendix 3 - Table S). Regarding the sample, Nutella only represented 10,5% (Appendix 3 - Table T).

Consumers type

Among *children* and *adults* purpose consumption type, 48% of the Nutella shoppers used to buy it only for adults, 23,7% to buy it only for children and 28,3% to buy it for both (Graphic 10).

Even combining this information with the end use of Nutella purpose, the tendency keeps the same, majority for adults' consumption, highlighting desserts (59%) and light snack (50%). Parties and breakfast are the most chosen moments regarding both consumers type, 34% and 32% respectively (Appendix 3 - Table U).

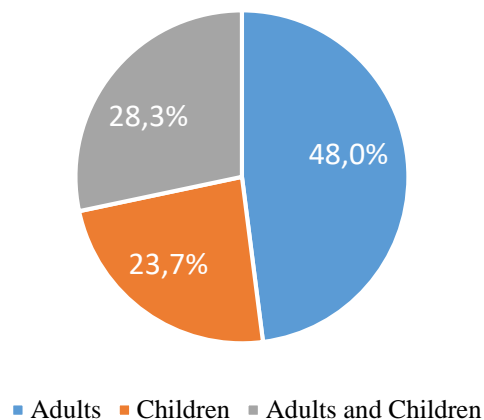
With regards to the gender variable, the male population is more likely to consume Nutella for breakfast, light snack and parties, whereas females outweigh the snacks and desserts category (Appendix 3 - Table V).

90% of Nutella shoppers don't buy it exclusively for its consumption. So, regarding the other consumers who benefited from that purchase, 50,8% were between 18 and 35 years old, 47,4% were younger than 18 [24,2% (11-17), 15,8% (6-10) and 7,4% (3-5)] and 33,7% belonged to the 36-55 age group (Appendix 3 - Table W). This leads to say that on average each Nutella shopper who are also a Nutella consumer buy it for the consumption of 2,4¹⁵ people.

f) Nutella purchase motives

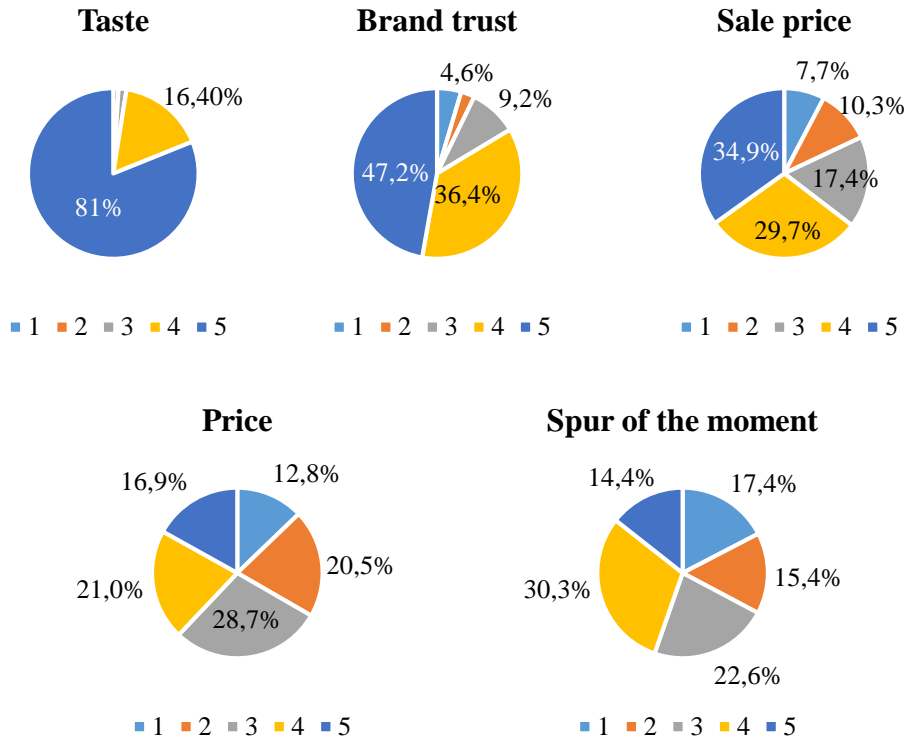
Regarding the motives to buy Nutella (evaluated by the 195 Nutella shoppers), in a scale from 1 (nothing important) to 5 (very important) (Graphic 11), *taste* lead the preferences with 81% of the highest score chosen (5), followed by *brand trust*, 47,2% of 5 and 36,4% of 4. In the third position was *sale price* (34,9% of 5 and 29,7% of 4), what proved to be more relevant that the *price* itself (16,9% of 5 and 21% of 4), what it is in line with the current strongly promotional market reality.

Graphic 10: Nutella consumer type purpose at purchase



¹⁵ $\frac{190 + (275-19)}{190} = 2,4$, where 190 = Nutella shoppers who consume it; 275 = all responses from them; 19 = Nutella shoppers exclusively for its own consumption; 275-19 = other consumers who benefited from Nutella purchase without purchasing it

Graphic 11: Motives to buy Nutella



Influences of socio-demographic characteristics on motives to purchase Nutella are analysed below in Table 11, Table 12, Table 13, Table 14 and Table 15, where “X” means that variable is not an influencer and “V” means that it is.

Table 11: Influence of socio-demographic characteristics on *Brand trust* motive

Gender	The proportion of the choices are similar by gender: 5-“very important” (45,92% of women; 47,86% of men); 4- (34,1% of women; 37% of men).	X
Age	The proportion of the choices tend to increase as age increases regarding option 5-“very important” (37,5% of “Younger than 18”; 47,8% of “18-35”; and 52,8% of “36-55”). There were no answers from “+55” age group.	V
Education level	5 and 4 were the most chosen options, by higher education.	X
Professional activity	5 and 4 were the most chosen options and they were picked mainly from workers for others (5 - 55,4%; 4 – 56,3%).	X
Household composition	Although the household composed by 4 people was the most mentioned, there were no differences regarding the importance tendency.	X
Income	There were no significant differences neither an identifiable pattern, being mostly chosen 5 and 4.	X

Data retrieved from Appendix 4 - Set of graphics 1

Table 12: Influence of socio-demographic characteristics on *Spur of the moment* motive

Gender	Female highest choice was “4” (with 63,9% of the female choices) and male highest choice was “3” (with 45,7% of the choices).	V
Age	18-35 age group choice is highlighted at 4 (79,7%), while “36-55” chose 3 to classify this variable importance. “Younger than 18” chose almost equally the 3 and the 4.	V
Education level	4 was the choice most chosen by higher education, whereas high school level chose almost equally all options.	X
Professional activity	The most chosen option was 4, led by worker for others (52,5%).	X
Household composition	4 was generically the most chosen, being highlighted by household of 4 people (40,9%).	X
Income	4 was the option clearly highlighted by 1500€ to 2000€ scale, followed by “more than 2500€”. Only “1001-1500€ chose 3 as the most important.	X

Data retrieved from Appendix 4 - Set of graphics 2

Table 13: Influence of socio-demographic characteristics on *Price* motive

Gender	Both women and men chose 3 regarding price importance.	X
Age	3 was the most chosen among all age groups.	X
Education level	3 was the most chosen by the higher education group. People with the high school concluded chose majority 4.	X
Professional activity	3 was the most chosen independently of the occupation.	X
Household composition	There are no significant differences among the groups.	X
Income	“More than 2500€” mostly chose 3, and then 2, with “1500€-2000€” following the same tendency. 3 was generically the most chosen.	X

Data retrieved from Appendix 4 - Set of graphics 3

Table 14: Influence of socio-demographic characteristics on *Sale Price* motive

Gender	Women clearly chose mostly 5 while men chose 4 the most.	V
Age	The same tendency was registered among the age groups, giving more importance to the 5 option.	X
Education level	There are no differences to register, all following the tendency to privilege the 5.	X
Professional activity	There are no significant differences among the groups.	X
Household composition	There are no significant differences among the groups.	X
Income	“500€-1000€” stand out choosing unquestionably the 5 score, being next followed by “1501€-2000€” and “2001€-2500€”. “More than 2500€” prioritized the 4.	V

Data retrieved from Appendix 4 - Set of graphics 4

Table 15: Influence of socio-demographic characteristics on *Taste* motive

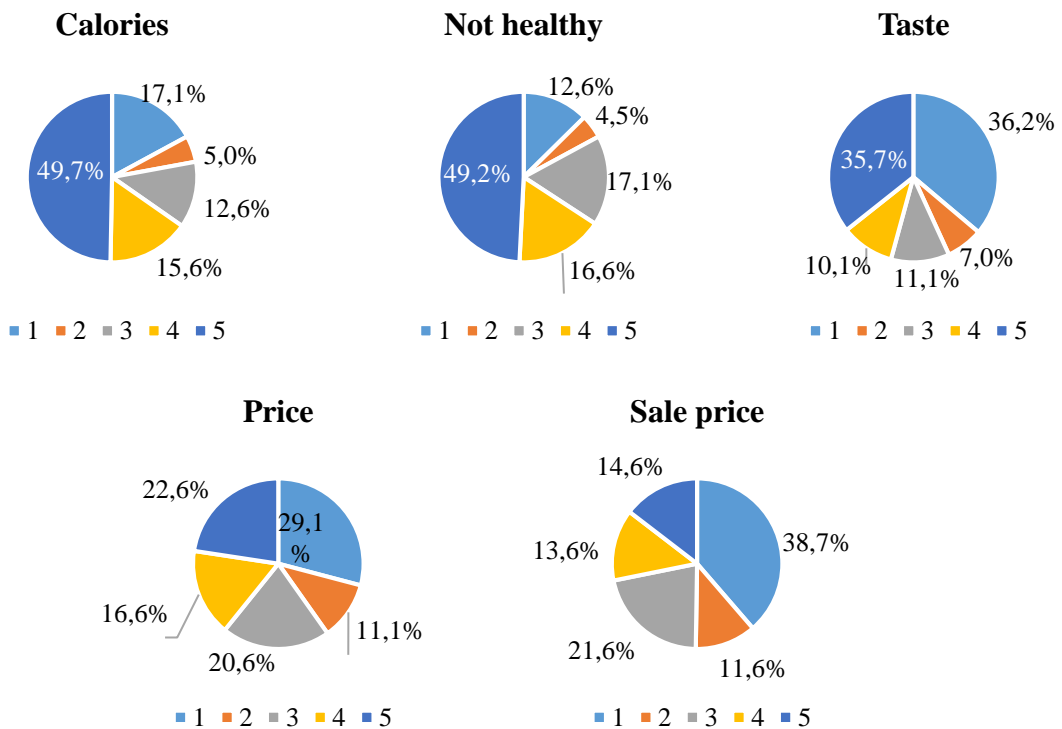
Gender	Both genders agree on its importance (mostly 5).	X
Age	“18-35” undoubtedly chose the 5. “More than 55” chose 4.	V
Education level	There are no differences to register, all following the tendency to privilege the 5.	X
Professional activity	There are no differences to register, all following the tendency to privilege the 5.	X
Household composition	There are no differences to register, all following the tendency to privilege the 5.	X
Income	There are no differences to register, all following the tendency to privilege the 5.	X

Data retrieved from Appendix 4 - Set of graphics 5

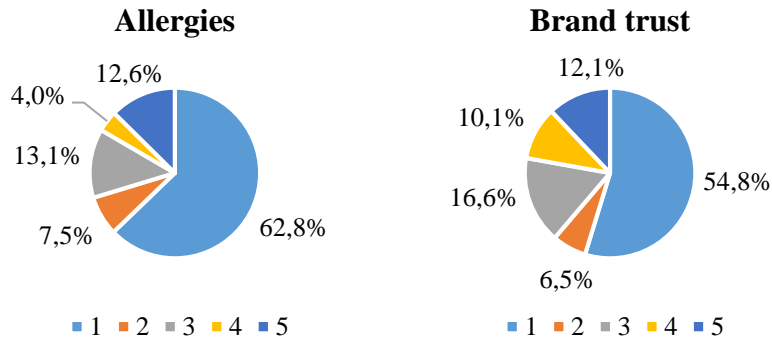
g) Nutella non-purchase motives

The spreadable creams shoppers who didn’t buy Nutella (199) considered *calories* as the top motive (49,7% of 5 and 15,6% of 4), very closed to *not healthy* (49,2% of 5 and 16,6% of 4) (Graphic 12). *Taste* and *price* were also highlighted as important motives to not buy the product.

Graphic 12: Motives to not buy Nutella



Innovation in the positioning of Nutella



14% of the spreadable creams shoppers who didn't buy Nutella, had *other* motives to not buy it. From them, 63% highlighted *to not like chocolate, to not like chocolate or sweet spreadable creams* or *to not like Nutella itself* (where 77% chose 5 to quantify its importance) and 11% mentioned *environmental* reasons (100% of 5).

II - Consumption habits of spreadable creams

a) Nutella consumers' characterization

48,9% of the respondents were Nutella consumers (297).

Regarding gender distribution, male representation is little above total sample. Yet, female is unquestionably predominant as Nutella consumers (Table 16).

Table 16: Comparison of gender distribution between *Nutella consumers* and *All respondents*

	Gender		Total
	Female	Male	
Nutella consumers	60,5%	39,5%	100,0%
All respondents	61,1%	38,9%	100,0%

Data retrieved from Appendix 5 – Table A and Graphic 6

Nutella consumers are aligned with the sample in terms of age distribution. However, it is evidenced +7% regarding the already most prominent age group: 18-35 (Table 17).

Table 17: Comparison of age distribution between *Nutella consumers* and *All respondents*

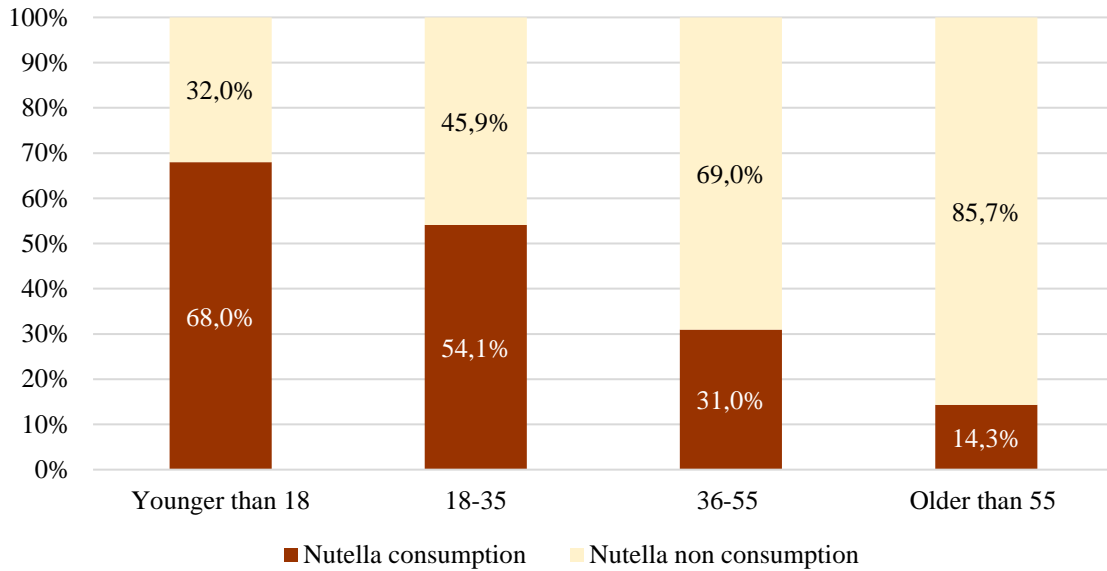
	Age				Total
	Younger than 18	18-35	36-55	Older than 55	
Nutella consumers	11,40%	74,10%	13,50%	1,00%	100,0%
All respondents	8,20%	67,10%	21,30%	3,50%	100,0%

Data retrieved from Appendix 5 – Table B and Graphic 6

Innovation in the positioning of Nutella

Moreover, as the age of the respondents increases, the percentage of Nutella consumers tends to decrease (Graphic 13).

Graphic 13: Nutella consumption by age group



Using the Chi-square test of association between *Nutella consumers* and age, we can see a clear association between the two variables, (with a significance level $\alpha = 0,05^{16}$), (*Pearson Chi-square* = 38,221; *df* = 3; $\rho = 0,00$), which proves it is a dependent relationship (Appendix 5 - Table G).

In line with Nutella shoppers results, also Nutella consumers present less people with higher education versus sample (-4,6%) (Table 18).

Table 18: Comparison of education level distribution between *Nutella consumers* and *All respondents*

	Education level				Total
	Elementary School	Middle School	High School	Higher Education	
Nutella consumers	3,0%	6,1%	16,5%	74,4%	100,0%
All respondents	1,0%	6,3%	15,3%	77,4%	100,0%

Data retrieved from Appendix 5 - Table C and Graphic 6

Concerning professional activity, Nutella consumers are represented for +5,4% of students versus sample (Table 19).

¹⁶ Significance level also used in the remaining analyzes

Table 19: Comparison of professional activity distribution between *Nutella consumers* and *All respondents*

	Professional activity					Total
	Student	Student worker	Worker for others	Self-employed	Unemployed	
Nutella consumers	30,0%	11,1%	51,2%	4,0%	3,7%	100,0%
All respondents	24,6%	11,9%	55,2%	5,3%	2,8%	100,0%

Data retrieved from Appendix 5 – Table D and Graphic 6

Looking at household composition, 37% of Nutella consumers belong to a household composed by 4 people (+4,4% vs sample), following the same tendency as Nutella shoppers, already described previously (Table 20). Chi-square test of association demonstrated a significant association between the variables, which proves it is a dependent relationship (*Pearson Chi-square* = 14,796; *df* = 4; ρ = 0,005) (Appendix 5 - Table G).

Table 20: Comparison of household composition distribution between *Nutella consumers* and *All respondents*

	Household composition					Total
	1	2	3	4	5+	
Nutella consumers	8,8%	17,2%	23,6%	37,0%	13,5%	100,0%
All respondents	24,6%	20,3%	25,4%	32,6%	10,5%	100,0%

Data retrieved from Appendix 5 - Table E and Graphic 6

Income analysis did not highlight any substantial differences (Table 21). Chi-square test of association also demonstrated that those variables are independent (*Pearson Chi-square*= 3,125; *df* = 5; ρ = 0,681) (Appendix 5 - Table G).

Table 21: Comparison of monthly gross household distribution between *Nutella consumers* and *All respondents*

	Monthly gross household income							Missing	Total
	Less than 500€	500€- 1000€	1001€- 1500€	1501€- 2000€	2001€- 2500€	More than 2500€			
Nutella consumers	3,1%	16,2%	17,2%	19,7%	17,2%	26,6%	0,0%	100,0%	
All respondents	2,5%	15,2%	16,5%	20,3%	15,2%	27,8%	2,6%	100,0%	

Data retrieved from Appendix 5 - Table F and Graphic 6

From the 48,9% of the respondents who consumed Nutella (297), 78,5% are spreadable creams shoppers, buying mostly butter (81,5%) (Table 22).

Table 22: Distribution of spreadable creams purchased by Nutella consumers

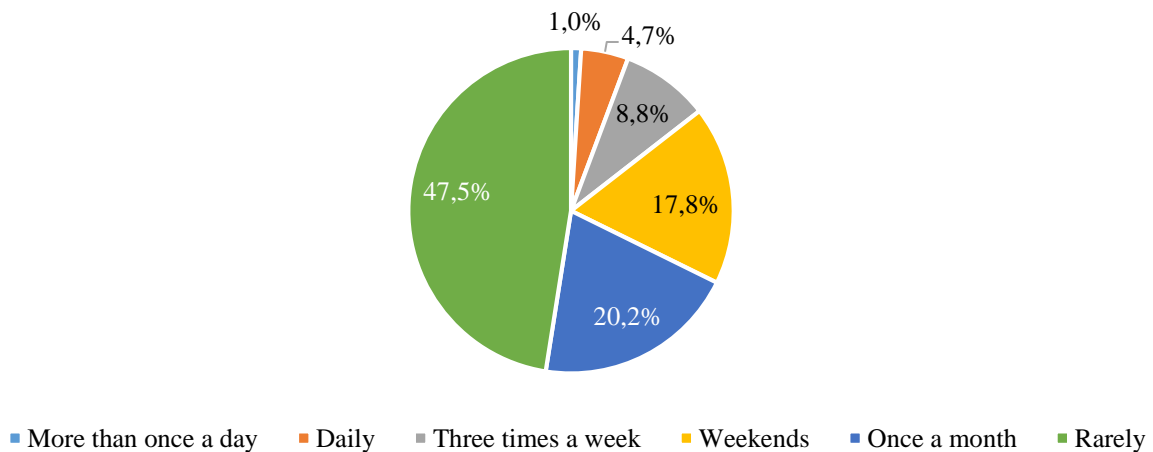
Nutella	Tulicreme	Other chocolate spreadable cream	Butter	Sweet / Marmalade	Cheese cream	Other
81,5%	9,4%	5,2%	88,4%	36,9%	45,5%	2,1%

Data retrieved from Appendix 3 – Table M

b) Nutella consumption frequency

The most consumption frequency was *rarely* (47,5%), followed by *once a month* (20,2%) and *on weekends* (17,8%) (Graphic 14).

Graphic 14: Nutella consumption frequency



c) Nutella consumption preferences

Regarding the consumption moment, afternoon snack was the most favored moment (82,8%). Nutella consumption at breakfast represented 25,6% of the preferences, within Nutella consumers (Appendix 5 - Table H).

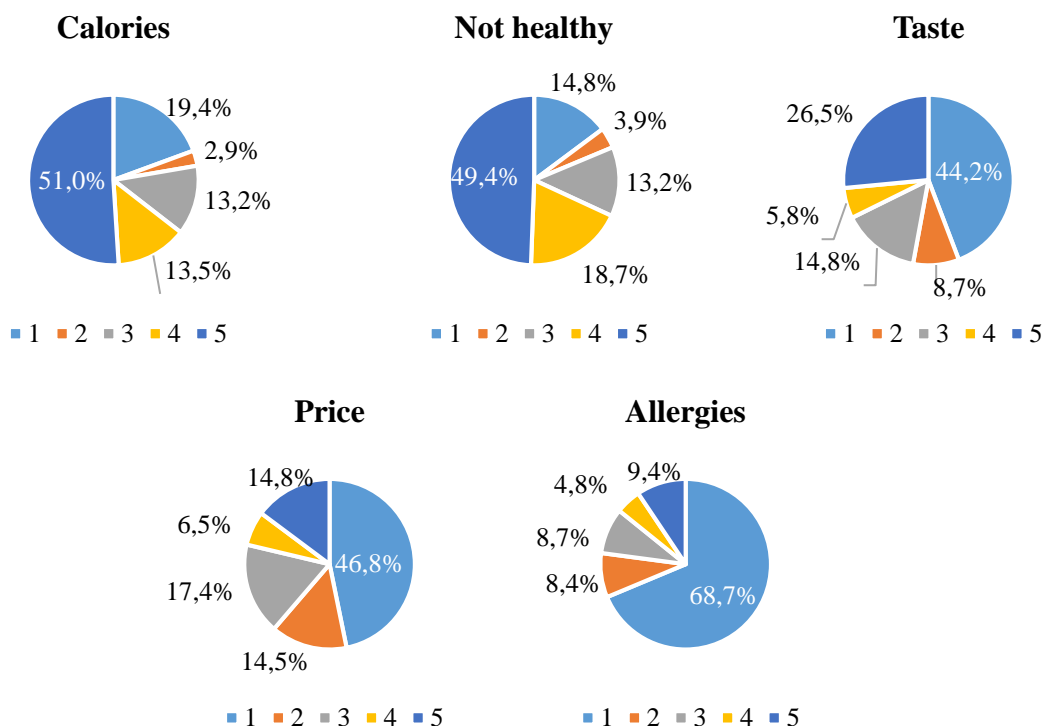
According to the respondents, bread is the most common way to enjoy Nutella (71%), followed by the combination with crepes (67%) (Appendix 5 - Table I).

The most common place to consume Nutella is at home (85,8%) and at a crepe store (41,9%). 31,4% of the respondents consume Nutella both at home and at a crepe store (Appendix 5 - Table J).

d) Nutella non-consumption motives

With regards to the respondents who didn't consume Nutella (310), the main motives were in line with the motives to not buy it: *calories* (51% of 5 and 13,5% of 4) and *not healthy* (49,4% of 5 and 18,7% of 4) (Graphic 15).

Graphic 15: Motives to not consume Nutella



12,3% of the respondents added *other* motives to not consume it, where 55,3% of them highlighted mostly the same motives to not buy it: *to not like chocolate, to not like chocolate or sweet spreadable creams or to not like Nutella itself* (94% of 5).

Influences of socio-demographic characteristics on motives to not consume Nutella are analysed below in Table 23, Table 24, Table 25, Table 26 and Table 27, where “X” means that variable is not an influencer and “V” means that it is.

Table 23: Influence of socio-demographic characteristics on *Taste* motive

Gender	Women give more importance to taste than men (women: 37,8% of 1 and 61,7% of 5; men: 51,9% of 1 and 38,3% of 5)	V
Age	The tendency among groups is the same	X
Education level	There is no significant differences among groups	X
Professional activity	There is no significant differences among groups	X
Household composition	There is no significant differences among groups	X
Income	There is no significant differences among groups	X

Data retrieved from Appendix 6 - Set of graphics 1

Table 24: Influence of socio-demographic characteristics on *Price* motive

Gender	The tendency among groups is the same.	X
Age	The tendency among groups is the same.	X
Education level	The tendency among groups is the same.	X
Professional activity	The tendency among groups is the same.	X
Household composition	There is no significant differences among groups.	X
Income	“500€-1000€” segment highlighted to give greater importance to price while “more than 2500€” barely give it importance	V

Data retrieved from Appendix 6 - Set of graphics 2

Table 25: Influence of socio-demographic characteristics on *Not healthy* motive

Gender	Although the tendency is the same among groups, women percentage who chose 5 is overwhelming	V
Age	The tendency among groups is the same	X
Education level	The tendency among groups is the same	X
Professional activity	There is no significant differences among groups	X
Household composition	There is no significant differences among groups	X
Income	There is no significant differences among groups	X

Data retrieved from Appendix 6 - Set of graphics 3

Table 26: Influence of socio-demographic characteristics on *Calories* motive

Gender	Although the tendency is the same among groups, women percentage who chose 5 is overwhelming	V
Age	The tendency among groups is the same	X
Education level	The tendency among groups is the same	X
Professional activity	The tendency among groups is the same	X
Household composition	The tendency among groups is the same	X
Income	There is no significant differences among groups	X

Data retrieved from Appendix 6 - Set of graphics 4

Table 27: Influence of socio-demographic characteristics on *Allergies* motive

Gender	The tendency among groups is the same	X
Age	The tendency among groups is the same	X
Education level	The tendency among groups is the same	X
Professional activity	The tendency among groups is the same	X
Household composition	There is no significant differences among groups	X
Income	There is no significant differences among groups	X

Data retrieved from Appendix 6 - Set of graphics 5

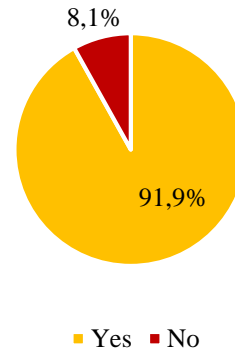
III – Consumption habits of spreadable creams at breakfast

a) Breakfast consumption habits

Only 91,9% of the respondents used to have breakfast (Graphic 16).

From them, 91,8% used to have breakfast at *home*, 10,8% used to have breakfast at a *café* or at a *pastry shop* and 3,9% used to have breakfast at *other place*, mostly *at work* (86%) (Appendix 7 - Table A).

Graphic 16: Breakfast consumption

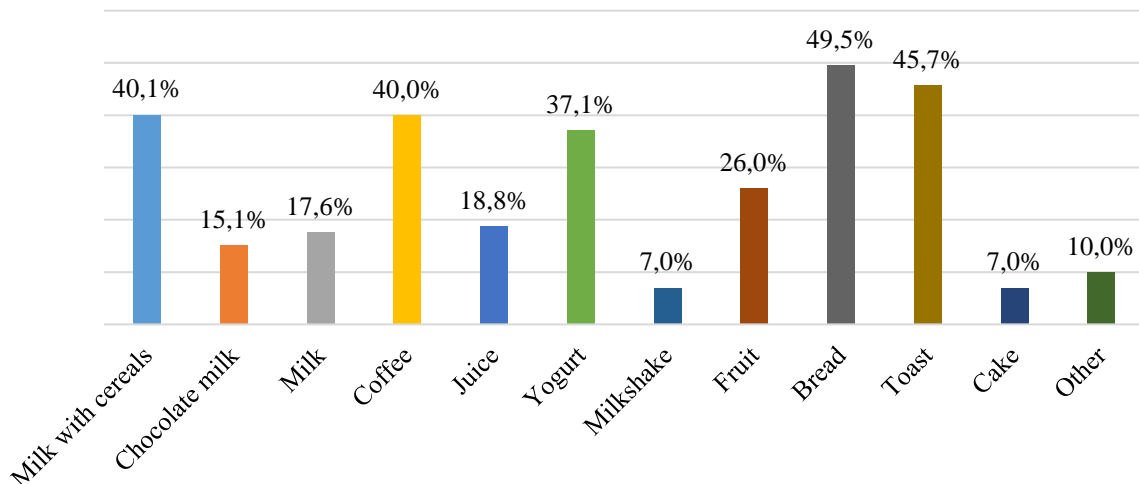


When asked about who they usually have breakfast with, 69,9% of the respondents told to have it *alone* whilst 39,1% told to have it *with family* (71,6% daily, 23,9% on weekends). From the ones who said to have breakfast mostly *alone*, 38,7% have breakfast *with family* on weekends. 52,7% of the ones who used to have it with *colleagues/friends*, they have it with family on weekends (Appendix 7 - Table B).

When asked about how often they had it in the family, 32,4% said *on weekends*, 32,3% said *daily* and 24,9% said *rarely*. Breakfast in family by age group distribution was that “Younger than 18” mostly had breakfast in family on a *daily* basis (62,2%), but also *on weekends* (17,8)%. “18-35” age group usually had breakfast in family *on weekends* (33,9%) and *daily* (24,3%) but also *rarely* (29%). “36-55” age group had breakfast in family mostly *daily* (45,7%) and *on weekends* (34,6%) (Appendix 7 - Table C).

Regarding breakfast composition, the most popular options are *bread* (49,5%) or *toast* (45,7%), *milk with cereals* (40,1%), *coffee* (40,1%) and *yogurt* (37,1%) (Graphic 17).

Graphic 17: Breakfast options



Innovation in the positioning of Nutella

From bread consumers, 16,7% have it with *milk with cereals*, 22,6% have it with *coffee* and 19,7% with *yogurt*. From toast consumers, 19,4% combine it with *milk with cereals*, 22,2% with *coffee* and 20,1% with *yogurt*. 22,4% consume both bread and toast, once they might not have the same kind of breakfast every day (Appendix 7 - Table D).

Additionally, the 10% representing *other* options are mainly characterized by *tea* (25%), *milk with coffee* (16,1%) and *soy, almond, rice and oats drinks* (10,7%).

b) Spreadable creams consumption habits at breakfast

The most popular combinations with plain bread are *butter* (65,9%), *cheese* (54,7%) and *ham* (52,9%). 37% combine *ham* with *cheese*, 31,2% combine *butter* with *cheese* and 30,1% combine *butter* with *ham*. *Nutella* only represents 15,2% of the preferences (Appendix 7 - Table E).

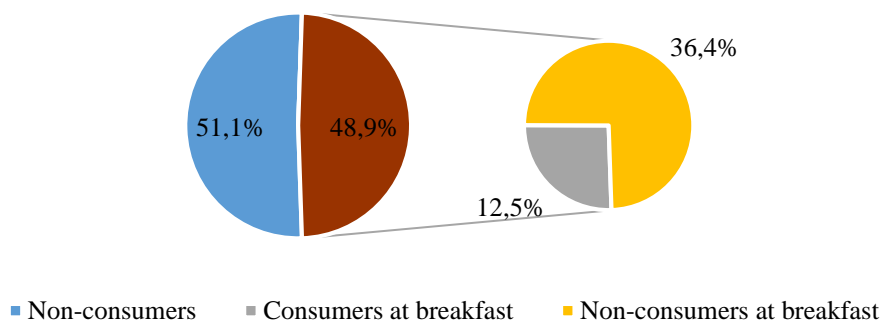
Regarding toasts, *butter* is leading outstandingly (91%). *Nutella* only represents 7,5% of the choices (Appendix 7 - Table F).

c) Nutella consumption at breakfast

Converting bread and toast combinations into all sample regarding breakfast, 12,7% spread Nutella on plain bread, 5,6% spread Nutella on a toast and 1,3% spread it on both (Appendix 7 - Table G).

However, regarding the sample, Nutella consumption at breakfast was 12,5%¹⁷ (76) (Graphic 18).

Graphic 18: Nutella consumption at breakfast



From the 36,4% non-consumers at breakfast, actually 4,9% didn't use to have breakfast.

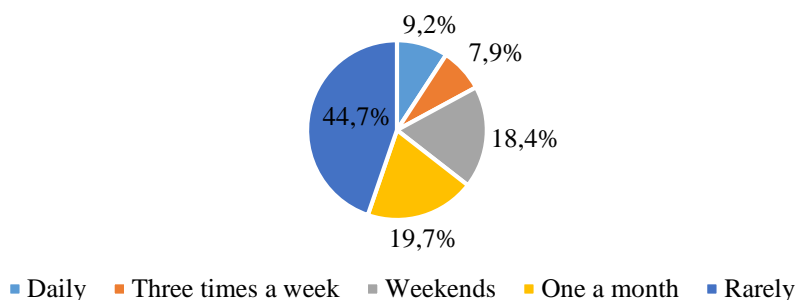
¹⁷ % of respondents who chose breakfast as Nutella consumption moment

Regarding the way Nutella is enjoyed at breakfast, *bread* got the highest percentage at breakfast (89,5%) versus every other moments throughout the day (representing +18,5% (Appendix 5 - Table I and Appendix 7 - Table G).

d) Characterization of Nutella consumers at breakfast

The highest frequency of Nutella consumption at breakfast was *rarely* (44,7%), *once a month* (19,7%) and only *on weekends* (18,4%) (Graphic 19).

Graphic 19: Frequency of Nutella consumption at breakfast



Nutella consumption at breakfast was in general more balanced among genders vs sample (54,7% women, 45,3% men). Concerning daily consumption, it was led majority by men (60% = +21,1% vs sample distribution) (Appendix 7 - Table H).

Nutella consumption at breakfast by age group was distributed as follows: 71,1% (“18-35”), 14,5% (“Younger than 18”) and 13,2% (“36-55”). *Daily* Nutella consumption at breakfast was made mostly by “Younger than 18” people (42,9%). *Three times a week* consumption frequency was made mostly by “18-35” age group (50%). Regarding *on weekends* consumption, 57,1% belonged to the age group “18-35” and 28,6% to the age groups “Younger than 18” (Appendix 7 - Table I).

Regarding *daily* Nutella consumption, it was as more often as the respondents had breakfast in family: 44% if *daily*, 26,7% if *on weekends*, 26,7% if *rarely* and only 2,7% if they *never* have breakfast in family (Appendix 7 - Table J).

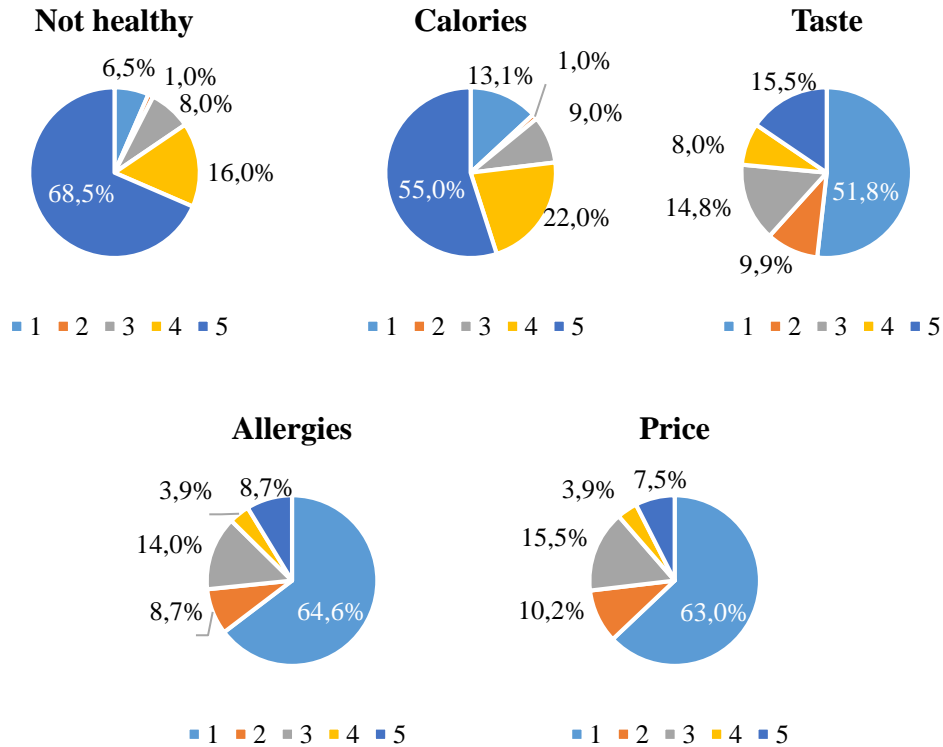
Asked about what they used to spread on bread at breakfast, respondents age group distribution were slightly below the version by assumed Nutella consumers at breakfast, highlighting +1,3% of people older than 55, who were Nutella consumers at breakfast without assuming it (Appendix 7 - Table K).

Regarding gender, there were more women spreading Nutella on bread at breakfast than the ones who assumed to do it. (57,6% = + 2,9% vs Nutella women consumers at breakfast) (Appendix 7 - Table L).

e) Nutella consumption at breakfast – Considerations

68% of the total respondents didn't consider Nutella as ideal to have at breakfast, justifying it mainly for *not* being *healthy* (68,5% of 5) and being *caloric* (55% of 5) (Graphic 20).

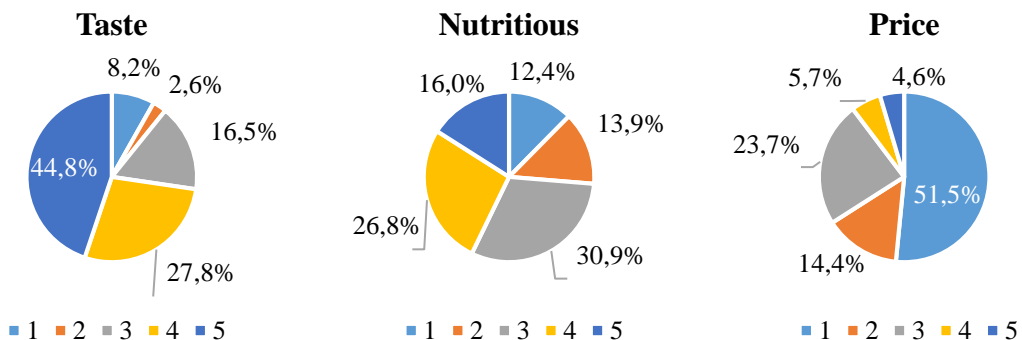
Graphic 20: Motives to not consider Nutella ideal for breakfast



These motives already mentioned before regarding non-purchase and non-consumption (*not healthy* and *caloric*) were even more relevant regarding breakfast consumption.

Regarding the 32% who considered Nutella as ideal to have at breakfast, their choice was based primarily on *taste* (44,8% of 5 and 27,8% of 4) and on being *nutritious* (16,5% of 5 and 26,8% of 4) (Graphic 21).

Graphic 21: Motives to consider Nutella ideal for breakfast



Innovation in the positioning of Nutella

Moreover, 8,8% added *other* motives to consider Nutella as ideal for breakfast, in which 53% affirm mornings to be *the best time to consume Nutella* (67% of 5 and 33% of 4).

Consumers seem to view the consumption of products with this type of nutritional composition as healthier *at the beginning of the day*, versus in the afternoon or night, due to the amount of calories. In fact, 18% of correspondents noted that having Nutella for breakfast helps them to feel more energetic in the mornings (67% of 5 and 33% of 3).

Although only 32% of the sample considered Nutella as ideal to have at breakfast, there are substantial differences by breaking it through different profiles (Table 28).

Table 28: Cross tabulations between *Consider Nutella ideal for breakfast* and *different profiles*

	Yes	No
General	32%	68%
Nutella shoppers	43,6%	56,4%
Nutella consumers	43,4%	56,6%
Nutella shoppers for breakfast consumption	78,1%	21,9%
Nutella consumers at breakfast	82,9%	17,1%
Morning snack Nutella consumers	53,8%	46,2%
Afternoon snack Nutella consumers	42,3%	57,7%
Evening Nutella consumers	35,5%	64,5%
Non-consumers of Nutella	21%	79%

5.3. Discussion of the hypotheses

In this chapter, the investigation hypotheses previously defined based on the literature are going to be discussed mainly descriptively, according to the survey results.

H1: Nutella consumers profile is influenced by socio-demographic characteristics

H1 a) Nutella consumers profile is influenced by gender

Nutella consumers' profile is mostly composed of women (61,1%), so that the hypothesis regarding gender as an influencer of the Nutella consumer profile is accepted.

These findings are supported by previous studies, regarding generic consumer profile influence.

Fischer & Arnold (1994) consider that gender affects consumer behavior in several decision making moments, influencing specific usage patterns of a particular brand, product or service. Belk & Costa (1998) consider chocolate as a female consumer good, arguing that self-proclaimed chocoholics are predominantly women (Barthel, 1989) and that women are more likely to receive chocolate as a gift than men (Lupton, 1996; Savel, 1977). Additionally, women tend to discuss in greater detail the social, hedonic and emotional aspects of chocolate consumption than men (Belk & Costa, 1998).

H1 b) Nutella consumers profile is influenced by age

As the age of the respondents increases, the percentage of Nutella consumers tends to decrease and, as demonstrated with the Chi-square test, these variables have a dependent relationship, so that the hypothesis of age influencing on Nutella consumers' profile is accepted.

These findings were predictable, as Cole et al. (2008) stated that older consumers' brand choices are different from younger consumers' (Vlismas, K. et al., 2009). Also, Henry (2000) reinforces that age affects consumer's self-concept and life styles, determining the consumption of various products (Sridhar, G., 2007).

In spite of that strong influence, Nutella consumption is not exclusive from a specific age group, which is aligned with Writankar & Bhushan (2013) statement, who argue that chocolate consumption is no longer either a luxury or restricted only to kids age group alone (Kulkarni, S., 2016).

H1 c) Nutella consumers profile is influenced by level of education

Nutella consumers present less people with higher education versus sample (-3%). Level of education distribution is a limitation of the study derived from the sampling method used, once the large majority of the respondents have concluded higher education. Due to that, it is considered that the apparent not significant difference of 3% could be relevant. This difference might mean that more educated people might quail themselves to consume products such as Nutella, because education appears to be the strongest and the most consistent predictor of “*unhealthy*” lifestyle behaviors (Vlismas, K. et al., 2009).

Thus for the abovementioned reasons, the hypothesis defined is accepted.

H1 d) Nutella consumers profile is influenced by professional activity

Nutella consumers are represented by +5,4% of students versus the sample.

A study carried out in London regarding healthy eating, reported that students diet was less healthy than that of the non-students (Pollard, T. M. et al., 1998), having the same been previously found in the United States.

However, results from professional activity will not be considered since they did not offer useful insights. This way, the hypothesis is rejected.

H1 e) Nutella consumers profile is influenced by household composition

With regards to household composition, 37% of Nutella consumers belong to a household composed by 4 people (+4,4% versus sample). Additionally, Chi-square test demonstrated a significant association between the variables *Nutella consumer* and *household composition*, so that the hypothesis defined is accepted.

Literature findings report that children form a huge secondary market by influencing family purchases (McNeal, 1998), besides being also an important primary and future market (Geuens, M. et al., 2002). As shown, 90% of Nutella shoppers don't buy it exclusively for its consumption, purchasing it also for others: 50,8% for ages 18-35, 47,4% for younger than 18 years old and 33,7% for ages 36-55, so that it is assumed that the household composition influences the consumer profile of Nutella.

H1 f) Nutella consumers profile is influenced by income

Income analysis did not highlight any substantial differences, being those variables inclusively independent.

As shown above, Nutella consumers' profile is influenced by gender, by age (being significantly dependent), by educational level and by household composition (being significantly dependent). There are no conclusions regarding professional activity. Nutella consumer's profile is not influenced by the income received.

This way, it is considered that Nutella consumer's profile is generically influenced by socio-demographic characteristics, so that the Hypothesis 1 is generally accepted.

H2: Nutella shoppers profile is influenced by socio-demographic characteristics

H2 a) Nutella shoppers profile is influenced by gender

Spreadable creams shoppers, which represents 64,9% of the sample, were composed of 67,8% of women and 32,2% of men, meaning +6,7% of women versus all sample. Concerning Nutella shoppers (64,9% of women and 35,1% of men), there were +3,8% of women versus all sample, so that the hypothesis is accepted. These results are supported by literature findings, where Blaylock & Smallwood (1987) identified a tendency of women to perform the majority of the shopping trips concerning retailing (Vorobyev, K. et al., 2015). Also a study¹⁸ carried out to the Leicestershire population, in the UK, resulted in outstandingly gender outcomes, overwhelming women with the responsibility on deciding what foods were purchased (76,6%) (Beardsworth, A. et al., 2002), matching with the work of other authors like Murcott (1982), Charles and Kerr (1988), DeVault (1991) and Fischler (1986).

Comparing to men, the percentage of Nutella shoppers and spreads shoppers, there is a difference of +2,9%, that might mean a superior preference of Nutella versus other spreads by men.

H2 b) Nutella shoppers profile is influenced by age

Sommer, Wynes, & Brinkley (1992) reinforced that older people spend more time shopping than younger respondents (Vorobyev, K. et al., 2015). However, these findings do not support this study's observations, since Nutella shoppers are mostly composed of the age group

¹⁸ 421 interviewees (58% women; 42% men)

“18-35” (68,7%), limitation that derives from the sampling method used. This way, the hypothesis is rejected.

H2 c) Nutella shoppers profile is influenced by education level

Although Nutella shoppers are composed mostly of respondents with “higher education” (72,8%), what is also a limitation derived from the sampling method, it differs - 4,6% versus all sample. This difference might mean that more educated people might be less inclined to purchase Nutella, so that the hypothesis is accepted, since education is related to health outcomes through its influence on lifestyle behaviors and values, such as the importance of having preventive health behaviors (Vlismas, K. et al., 2009).

H2 d) Nutella shoppers profile is influenced by professional activity

Concerning professional activity type, Nutella shoppers are more represented by students versus the sample (+4,6%), which is not aligned with the literature findings abovementioned (Vorobyev, K. et al., 2015), reporting that older respondents might spend more time shopping, considering retailing and the students of this study are composed of respondents under 36 years old.

As it was explained regarding Nutella consumer's, this variable did not offer useful insights, so that the hypothesis is rejected.

H2 e) Nutella shoppers profile is influenced by household composition

Solomon (2011) suggests family structure as one of the factors affecting the consumer buying process. Generally speaking, there are significant differences among Nutella shoppers and sample. The most notable is the difference concerning 1 single person household (-19%). Although both Nutella shoppers and all samples are mostly composed of 4 people, that weight is even more relevant for Nutella shoppers (+8,4%), so that the hypothesis defined is accepted.

Comparing the same variable but only with spreads shoppers, the reality is more alike versus comparing it with the sample, however there is still a tendency to have Nutella shoppers better represented by a household of 4 and 5 or more people.

Aligned with the findings regarding consumption, Kerrane, B. et al. (2014) support these results, highlighting the pervasive influence of the family on individuals' consumption throughout its life course.

H2 f) Nutella shoppers profile is influenced by income

There are no significant differences between income distribution of Nutella shoppers versus the sample and versus the spreads shoppers and thus the hypothesis is rejected.

Even though the sample has some limitations in the sampling method used, it can be said that Nutella shoppers' profile is influenced by gender, education level and household composition. Regarding age and professional activity influence, it is not possible to reach a conclusion. Nutella shoppers' profile is not influenced by monthly gross household income. Therefore Hypothesis 2 is generally accepted.

H3: Shoppers motives to buy Nutella are influenced by socio-demographic characteristics

Shoppers motives to purchase Nutella were influenced by socio-demographic characteristics in different ways, since not all the motives were influenced by the same characteristic, so that Hypothesis 3 has to be generally rejected.

H3 a) Brand trust is influenced by socio-demographic characteristics

Brand trust was shown to be influenced by age only (increasing the importance assigned with increasing age of the shoppers), so that the hypothesis is rejected. However, these findings are supported in the literature by Larzelere & Huston (1980) and Morgan & Hunt (1994), who consider trust as a central element of any long-term relationship, what might explain what the oldest already give more importance to the variable in study (Delgado-Ballester & Munuera-Alemán, 2001). Keller (1993) and Krishnan (1996) view it as a process by which individuals trust image attribution to the brand is based on his/her experience with that brand, which is therefore influenced by the consumer's evaluation of any direct and indirect contact with the brand (Delgado-Ballester & Munuera-Alemán, 2001).

H3 b) Spur of the moment is influenced by socio-demographic characteristics

“Spur of the moment” appeared to be influenced by gender and age only, so that the hypothesis is rejected. “Spur of the moment” is not considered to be influenced by the level of education due to the limitations of the sample.

Impulsive buying, defined as “an unplanned purchase” is described as more irresistible compared to planned purchasing behavior, whereas highly impulsive buyers are likely to be emotionally attracted to the object, unreflective in their thinking, and to desire immediate

delight (Hoch & Loewenstein, 1991; Thompson et al. 1990 (Kacen & Lee, 2002). Women were clearly more vulnerable to the studied variable, as well as the “18-35” age group.

Kacen & Lee (2002) support this results with previous research conducted in the US and in the Great Britain which has named age as one of the many factors that influence impulsive buying behavior (Bellenger, Robertson & Hirschman, 1978; Wood, 1998). Wood (1998) found an inverse relationship between age and impulse buying overall, registering an increase impulse buying between the ages of 18 and 39 and a declining thereafter, being that consistent with Bellenger et al.’ (1978) finding, regarding shoppers under 35 were more prone to impulse buying compared to those over 35 years old (Kacen & Lee, 2002). The authors suggest that consumers learn to control their impulsive buying tendencies as they age.

Those studies also found out that pleasurable feelings led to increased unplanned spending (Dittmar et al., 1995) and that might be affected by social categories such as gender, arguing that women value their possessions for emotional and relationship-oriented reasons (Kacen & Lee, 2002).

H3 c) Price is influenced by socio-demographic characteristics

Price would only be influenced by education level. However, that result was due to the sample limitations, so it is considered that price is not influenced by any of the socio-demographic characteristics, thus the hypothesis is completely rejected.

H3 d) Sale price is influenced by socio-demographic characteristics

Sale price was influenced by gender, where women were clearly more sensitive to promotions. Income was particularly considered important by the echelon “500€-1000€”, not affecting that much the ones who earn more than 2500€, so it is assumed that the more the respondents earn, the less sensitive they are to sale price.

In spite of there are some influential variables, the hypothesis is rejected.

H3 e) Taste is influenced by socio-demographic characteristics

Taste was the variable less influenced by socio-demographic characteristics, being able to gather a consonant agreement crosswise, so that this hypothesis is clearly rejected.

According to a study carried out to the Spanish consumers, “*taste*” was also one of the factors that stood out the most as conditioner to their attitudes to food choice (Carrillo, E. et al., 2011). However, regarding the current study, it proved to be slightly influenced by age, once

the oldest ones did not consider it as important as the younger ones did. As previously mentioned regarding age influence on consumption, these results were predictable, as Cole et al. (2008) stated that older consumers' brand choices are different from younger consumers (Vlismas, K. et al., 2009).

H4: Motives to not consume Nutella are influenced by socio-demographic characteristics

Summing up, respondents' motives to not consume Nutella were influenced by socio-demographic characteristics in different ways, once not all the motives were influenced by the same characteristics, so that the Hypothesis 4 is generally rejected.

H4 a) *Taste* is influenced by socio-demographic characteristics

Taste was proven to be influenced by gender with a significant association, particularly affecting women. However, given that it was the only socio-demographic parameter playing a role, the hypothesis is rejected.

Literature findings state the female effect for example in the Anglo-Saxon countries (Hamilton, 1992; Nuttall, 1988), in which women consume about twice as much chocolate as men (Belk & Costa, 1998), what might justify the importance granted by women regarding taste.

H4 b) *Price* is influenced by socio-demographic characteristics

Price was only influenced by the consumers income, whereas "500€-1000€" segment highlighted to give it very importance, as opposed to "more than 2500€" segment that stated it mostly as not important. Due to that, the hypothesis is rejected.

Martínez & Montaner (2008) state that price is the decisive factor for some consumers, whereupon they focus their attention almost entirely on paying low prices, ignoring other product attributes (González-Benito, O. et al., 2014), for this reason it is understandable that the lower the income, the greater the importance given to product prices.

H4 c) *Not healthy* is influenced by socio-demographic characteristics

Not being healthy is also a variable influenced by gender, where women role stands out, overwhelming the importance given to this variable versus men. According to Beardsworth, A. et al. (2002), fundamental gender related differences in basic nutritional attitudes were

identified, with women appearing to be more reflective about food and health issues, demonstrating higher concern on this topic.

Once again, due to the exclusive influence of gender, the hypothesis is rejected.

H4 d) *Calories* is influenced by socio-demographic characteristics

The calorific content is also a variable influenced by gender, where women role stands out. Additionally, there is a significant relationship between *calories* and *gender*, proving its dependency. In the same line as the healthy issue, also calories highlight are supported by Beardsworth, A. et al. (2002), who identified fundamental gender related differences in basic nutritional attitudes, with women appearing to be more reflective about food and health issues, demonstrating higher concern with this topic.

However, as said before, due to the exclusive influence of gender, the hypothesis is rejected.

H4 e) *Allergies* is influenced by socio-demographic characteristics

Allergies are not influenced by any of the studied variables and thus the hypothesis is rejected.

H5: Typical usage situation of Nutella is at breakfast

According to the survey results, one third of the Nutella shoppers (195) chose Nutella for breakfast, regarding purpose consumption at purchase moment (32,8%). Taking into account the sample size, that results are translated to 10,5%.

With regards to consumption itself, Nutella at breakfast gathered 25,6% of the preferences within Nutella consumers (297). However, taking into account the sample size, that results are translated to 12,5%.

These results are not in accordance with the literature in which this hypothesis was based, being though proved that for Portugal there is still a different reality regarding Nutella consumption. Also, a study carried out on Swiss children, regarding breakfast habits, where the majority of the children reported eating breakfast almost every day, showed Nutella as the favorite spread (16,0% of the children, compared with 13,9% for jam and 9,9% for honey), with only a minority consuming butter on their bread (Baldinger, N. et al. 2012). However, according to Ovaskainen, M. L. et al. (2006: 498), "*food consumption and food items at main meals and at snacks may differ by country*", what explains those differences among countries.

Therefore the hypothesis is rejected, although it is already a reality in other countries.

According to a global study of the social consumer perspective on chocolate and candy bars regarding two years of historical social media content, consisting of over 150 million posts for the category, Netbase¹⁹ found that in consumer hearts, Nutella maintains a strong breakfast position and leaves people happy, having improved its position, despite issues surrounding health that need to be addressed.

H6: Nutella is a cross-generations product

Survey data collection did not have a normal distribution regarding age, being mostly composed by 18-35,. This represents a limitation to this study,, not being the best study population to assess this premise. Nonetheless, in terms of percentage, Nutella consumption was proven to decrease with the increase of age.

There were two questions at the survey that can offer some complementary insights regarding this matter: *consumer type* and *age of the other consumers*.

Consumer type analysis revealed that although 28,3% of the Nutella purchases were meant both for children and adults, 48% were intended exclusively for adults consumption.

Additionally, when Nutella shoppers where asked about the age of the other consumers of their purchase it was identified that 50,8% were between 18 and 35 years old, 47,4% were younger than 18 and that 33,7% belonged to the 36-55 age group. These insights allow to conclude that Nutella appears to be a cross-generations product, thus the hypothesis is accepted, although there is a concentration under 55 years old with special focus under 36.

A survey conducted on a sample group of approximately 1000 French children aged between 9 and 11 years showed Nutella spread as one of the favorite foods among children (Le Bigot Macaux, A., 2001).

H7: Nutella consumption is influenced by the family

In regard to household composition, 37% of Nutella consumers belong to a household of 4 people (+4,4% vs sample). However this is not enough to prove the hypothesis defined.

Regarding breakfast, daily Nutella consumption is as more often as they have breakfast in family: 44% if *daily*, 26,7% if *on weekends*, 26,7% if *rarely* and only 2,7% if they *never* have breakfast in family.

Therefore the hypothesis is rejected, since the influence of the family is not able to be proved, besides the one regarding breakfast consumption moment.

¹⁹ Source: NetBase Brand Passion Report: The social consumer view of Chocolate & Candy Bars <http://learn.netbase.com/h/i/143157769-netbase-brand-passion-report-chocolate> [Accessed 25 September 2016]

6. Conclusions

6.1. Main conclusions

Results from the survey show similar characteristics among Nutella shoppers' and Nutella consumers' profiles, being both mostly composed of women, of the 18-35 age group, and mostly belonging to a household of 4 people.

Regarding the motives to buy Nutella, *taste* lead the preferences with 81% of the highest score chosen (5), followed by *brand trust* (47,2% of 5 and 36,4% of 4). The spreadable creams shoppers who didn't buy Nutella (199) considered *calories* as the top motive (49,7% of 5 and 15,6% of 4), very closed to *not healthy* (49,2% of 5 and 16,6% of 4). With regards to the respondents who didn't consume Nutella, the main motives were in line with the motives to not buy it: *calories* (51% of 5 and 13,5% of 4) and *not healthy* (49,4% of 5 and 18,7% of 4).

Shoppers' motives to purchase Nutella as well as respondents' motives to not consume it were influenced by socio-demographic characteristics in different ways, since not all the motives were influenced by the same characteristics. For instance, *taste* stood out as the variable less influenced by socio-demographic characteristics, being able to gather a consonant agreement crosswise. *Brand trust* proved to be influenced by age (increasing the importance assigned the older the shoppers were). *Sale price* was influenced by gender, where women were more sensitive to promotions. *Not healthy* and *caloric* were also influenced by gender, where women role stands out.

Consumer type analysis reveals that although 28,3% of the Nutella purchases were meant both for children and adults, 48% were intended exclusively for adults consumption. Additionally, when Nutella shoppers where asked about the age of the other consumers of their purchase it was identified that 50,8% were between 18 and 35 years old, 47,4% were younger than 18 and that 33,7% belonged to the 36-55 age group.

Regarding purchasing and consumption frequency, *rarely*, *quarterly* and *monthly* were almost equally distributed, which could be an opportunity to increase those frequencies and thus the sales.

The influence of the family at Nutella consumption was not concluded, except for daily breakfast, where daily Nutella consumption was more frequent as the respondents had breakfast in family: 44% if *daily*, 26,7% if *on weekends*, 26,7% if *rarely* and only 2,7% if they *never* have breakfast in family.

Serving combinations highlighted healthier habits regarding breakfast, once Nutella is mostly preferred to be consumed on bread at breakfast, against other possible combinations

throughout the day. This findings are in line with Portuguese culture of bread consumption, reaching 85% of penetration in Portuguese homes.

According to the survey results, 10,5% of the respondents chose Nutella for breakfast, regarding purpose consumption at purchase moment and 12,5% assumed to consume Nutella at breakfast. This is not in line with other countries, as in Italy for instance, where Nutella is almost considered a *must have* for breakfast.

32% of the respondents considered Nutella as ideal to have at breakfast (what is more than the ones who already do), supporting their choice mainly on *taste* (44,8% of 5 and 27,8% of 4) and on being *nutritious* (16,5% of 5 and 26,8% of 4). Additionally, there were respondents who added *other* motives to consider Nutella as ideal to have at breakfast, in which 53% affirm to be *the best time to consume Nutella* (67% of 5 and 33% of 4), since these products with this nutritional composition *must be consumed at the beginning of the day*, becoming this way healthier versus other moments, because this time of day is when the calorie intake should be highest. 18% also added to be *energetic* as another motive (67% of 5 and 33% of 3).

Combining these considerations with Nutella shoppers for breakfast consumption, 78,1% considered it ideal for breakfast, while 82,9% of the assumed consumers at breakfast shared that opinion. Also, combining it with other profiles, it was noted that 43,6% of Nutella shoppers and 43,4% of Nutella consumers also considered it ideal for breakfast, 53,8% of the ones who use to consume Nutella as a morning snack and 42,3% of who consume it as an afternoon snack also considered it as ideal for breakfast.

21% of non-consumers of Nutella also agreed that Nutella would be ideal for consumption at breakfast.

Comparing the percentage of respondents who considered it ideal for breakfast with the current consumption, and breaking it through different profiles, it is highlighted an opportunity that can be capitalized.

6.1.1. Innovation proposal

Now that the purchasing and consumption habits of Nutella have been analyzed, a conclusion as to what its positioning can be drawn.

Thinking first in terms of segmentation, this research shows that Nutella is largely consumed by adults, although it might be perceived as a children's product. In general, families are seen as the main target, with a view to reaching children. However families could be targeted to reach adults and then children will replicate their behavior.

Innovation in the positioning of Nutella

Secondly, consider the positioning of Nutella as a breakfast product. This research has shown that it should continue to follow that strategy, with a view to reinforcing it so as to increase its presence in the daily life of Portuguese families. According to Lendrevie, J. et al. (2015) one of the possible axes of differentiation regarding positioning dimension is consumption situations. In a similar case, the drinks giant Pernod Ricard is focusing its marketing strategy on consumption moments²⁰ to better connect with consumers. This innovation consists only of re-defining the positioning of the product, changing the context in which it is introduced. This strategy is named *position innovation* (Tidd & Bessant, 2009), *without changing its essential concept* (incremental innovation).

Marketing was the main instrumental function that supported this innovation process. Ferrero only started working on Nutella communications in Portugal in 2013 when they began offering personalized jars with named labels, available both in stores and to order online. In 2014, Nutella honored bakers, highlighting the efforts and sacrifices they make so that people can have fresh bread every day, thus promoting the association of Nutella with bread. This pairing is culturally rooted in Portuguese consumption habits in particular at breakfast. Last year, in 2015, Ferrero reinforced Nutella's association with bread, focusing its communication on breakfast consumption. The context was mostly in family as a source of happiness and energy for the rest of the day. In Italy, focused communication of Nutella for breakfast consumption started about 5 years ago and it is now a cultural habit. In Portugal, the double location of Nutella in store near both the bread or at the bakery counter, along with its regular presence in the condiments aisle, further aims to promote its association with bread.

The reinforcement of Nutella's marketing strategy has resulted in a sales increase, which justifies its market share growth. Within this timeframe the distribution strategy has been kept the same. However, the communication investment has resulted in larger orders by impulse channels. At the same time, Ferrero was able to stock larger units (630g and 1kg) at modern channels. On top of this, in 2014 two new formats were launched: 15g for hotels and 3kg for restaurants.

This research has proved that Nutella's positioning has changed and that there is still space for growth to consolidate that positioning. This is the result of a strong communication strategy that Ferrero has recently started in Portugal.

²⁰ Source: Pernod targets 'consumption moments'
https://www.warc.com/Content/News/Pernod_targets_'consumption_moments'.content?ID=20e47d9d-96dc-4997-9aa2-61036f3ebeda&q [Accessed 19 September 2016]

Positioning Nutella as a product to be consumed every day at breakfast will translate into huge increases of Ferrero profits. This is because repeated consumer behavior is important not only for brand understanding but also for financial motives, as noted by Wood & Neal (2009). In addition, Ehrenberg & Goodhardt (2002) and Wirtz, Mattila, & Lwin (2007) suggest that increases in repeated purchase and consumption are connected with increases in “*market share of a brand, customer lifetime value, and share of wallet*” (Wood & Neal, 2009: 579).

Finally, it cannot be forgotten the overwhelming importance placed on health and the caloric composition of this product, what has been found to be one of the biggest drawbacks against Nutella consumption overall. To address this concern it is suggested to create a lighter version of Nutella, with calorie reduction, in order to also reach the consumers who are more conscious of health. This type of innovation requires to introduce or improve products that an organization offers - *product innovation* (Tidd & Bessant, 2009).

6.2. Strengths and limitations

This research provided an empirical contribution to the study of purchasing and consumption habits, gathering insights from several ambits in the literature, constructing a solid basis of work. Also, the survey constructed allowed to reach some interesting conclusions, through analyzing purchasing and consumption habits of Nutella and identifying some potential opportunities to the brand.

However, there are some important limitations related to the sampling method used that restricts generalizations of those results, and it is worth nothing that this research is only to be considered as an exploratory study, due to the lack of truly random sample selection procedures, so that the results are specific to the sample of the population studied.

The instrument used was a good contributor for market research insights collection, allowing to understand spreads preferences, inherent motives to each act, frequencies and habits.

In spite of both the title and the introduction refer to spreads purchasing and consumption habits (not mentioning Nutella), the limitations of the survey conducted have diverted results regarding spreads preferences, where chocolate spreadable creams category totaled 63,7% within spreads category (excluding butter and cheese cream), against 36%⁶ what is its fair share. Also Nutella preferences within chocolate creams were diverted from Nielsen statistics (2015), representing 77,7% of the choices what it is above its market share (48%).

Although questions regarding breakfast composition might appear not to be essential for the study, they allowed to identify people who also consumed Nutella at breakfast that had not assumed it.

Regarding socio-demographic variables, there were options that were not well chosen, in spite of the pretesting, such as professional activity, as the results obtained did not lead to useful interpretations.

Also regarding frequencies, the options presented were concluded to not be the best ones, once there were really low or even null results for some of them, not allowing proper comparisons or further analysis.

Although the sample size appeared to be a significant sample, the segments applied throughout the survey, presenting questions to specific groups of respondents, reduced the sample in several small groups, calling into question the reliability of the results and reducing the applicable statistics techniques.

6.3. Recommendations for further research

This exploratory study might be used as a pre-work for a future research, as it provides a good base of preliminary results for future data research, hoping it will offer useful guidelines. That future research might take in consideration a stratified sample in order to allow generalizations and not diverted results. It is considered that a sample of 607 responses is suitable for this exploratory study. However, this research showed that only 32,1% of the respondents were Nutella shoppers and 48,9% were Nutella consumers. This way, the sample size must be around 1891²¹, in order to ensure that Nutella shoppers responses are significant to apply different statistics techniques and to ensure more quality and insightful results.

Additionally, as the literature puts more emphasis on other segmentation criteria versus the traditional ones, it must be incorporated the benefits sought at that new research instrument, aiming to provide deeper insights into the motivation and reasons for consumption, offering more accurate forecasts of purchasing behavior (González-Benito, O. et al., 2014).

Regarding socio-demographic characteristics, professional activity options must be adapted, following another structure, since the division applied in this study did not offer useful insights. However, its presence at the survey must be granted, since several studies have found differences in products consumption along with differences in the occupations (Sridhar, G. 2007). Occupation directly influences product preference (Mulhern, et al., 1998), and it is one

²¹ $\frac{607}{0,321} = 1891$

Innovation in the positioning of Nutella

of the widely applied cues to evaluate an individual (Hawkins, et al. 2003), being also strongly related to education and income (Sridhar, G. 2007). *Occupation* might be a more suitable term than *professional activity*, regarding the purpose of the question.

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Innovation in the positioning of Nutella

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8. Appendices

Appendix 1 - Ferrero Brands (Portugal)



Appendix 2 - Survey

ISCTE Instituto Universitário de Lisboa

Muito obrigada pela sua participação neste estudo sobre os hábitos de compra e de consumo de cremes para barrar. Os resultados obtidos serão muito importantes para o desenvolvimento da minha tese de Mestrado, pelo que agradeço que leia atentamente as perguntas. O preenchimento deste inquérito não demorará mais de 7 minutos. As respostas são completamente anónimas. Se pretender mais informação sobre os resultados deste estudo, poderá entrar em contacto através do e-mail dfcsa1@iscte.pt.

Nota importante: Este questionário está dividido em três partes:
 I - Hábitos de COMPRA de cremes para barrar
 II - Hábitos de CONSUMO de cremes para barrar
 III - Hábitos de CONSUMO de cremes para barrar - Pequeno-almoço

I - Hábitos de COMPRA de cremes para barrar

É COMPRADOR de cremes para barrar?

Sim

Não

If it is not a spreadable cream shopper: Skip to next chapter.

If it is a spreadable cream shopper:

Innovation in the positioning of Nutella

Quais os cremes para barrar que costuma COMPRAR?

Nutella	Tulicreme	Outro creme para barrar de chocolate	Manteiga / Margarina	Doce / Marmelada	Creme de Queijo	Outro
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If it is not a Nutella shopper:

Quais são os principais motivos para NÃO COMPRAR Nutella?

	Selecione de 1 a 5 a importância que cada um dos motivos abaixo tem para não comprar Nutella.				
	1 - Nada importante	2	3	4	5 - Muito importante
Confiança na marca	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoção	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sabor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Não saudável	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Calorias	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alergias	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Considera existir algum outro motivo para NÃO COMPRAR Nutella?

	Selecione de 1 a 5 a importância que esse outro motivo tem para não comprar Nutella.				
	1 - Nada importante	2	3	4	5 - Muito importante
Outro	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If it is a Nutella shopper:

Com que frequência COMPRA Nutella?

Semanalmente	Quinzenalmente	Mensalmente	Trimestralmente	Raramente
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Qual o tipo de embalagem de Nutella que costuma COMPRAR?

(Pode escolher várias opções)

			
Copo 200 g	Embalagem 400 g	Embalagem 630 g	Embalagem 3000 g
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Innovation in the positioning of Nutella

Quais são os principais motivos da sua COMPRA?

	Selecione de 1 a 5 a importância que cada um dos motivos abaixo tem na compra de Nutella.				
	1 - Nada importante	2	3	4	5 - Muito importante
Confiança na marca	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Impulso	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Promoção	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sabor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Considera existir algum outro motivo para COMPRAR Nutella?

	Selecione de 1 a 5 a importância que esse outro motivo tem na compra de Nutella.				
	1 - Nada importante	2	3	4	5 - Muito importante
Outro <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Qual é a finalidade de consumo da sua COMPRA?

(Pode escolher várias opções)

Pequeno-almoço
 Lanche
 Snacks
 Sobremesa
 Festas

Quem são os consumidores?

(Pode escolher várias opções)

Adultos
 Crianças

II - Hábitos de CONSUMO de cremes para barrar

CONSOME Nutella?

Sim
 Não

If do not consume Nutella:

Quais são os principais motivos para NÃO CONSUMIR Nutella?

	Selecione de 1 a 5 a importância que cada um dos motivos abaixo tem para não consumir Nutella.				
	1 - Nada importante	2	3	4	5 - Muito importante
Preço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sabor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Não saudável	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Calorias	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alergias	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Considera existir algum outro motivo para NÃO CONSUMIR Nutella?

	Selecione de 1 a 5 a importância que esse outro motivo tem para não consumir Nutella.				
	1 - Nada importante	2	3	4	5 - Muito importante
Outro <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Innovation in the positioning of Nutella

If consume Nutella:

Com que frequência CONSOME Nutella?

+1 vez por dia Diariamente Três vezes por semana Ao fim de semana 1 vez por mês Raramente

Quando costuma CONSUMIR Nutella?

(Pode escolher várias opções)

Pequeno-almoço Lanche da manhã Lanche da tarde À noite Refeições principais

Como CONSOME Nutella?

(Pode escolher várias opções)

No pão Em crepes Em bolachas Outro

Onde CONSOME Nutella?

Casa Restaurantes Nuts Creperias Outro

III – Hábitos de CONSUMO de cremes para barrar – Pequeno almoço

Costuma tomar pequeno-almoço?

Sim Não

If don't usually have breakfast: Skip to the last question of the chapter (for everyone)

If used to have breakfast:

Onde costuma tomar o pequeno-almoço?

Casa Café / Pastelaria Outro

Com quem costuma tomar o pequeno-almoço?

(Pode escolher várias opções)

Sozinho/a Em família Com colegas / amigos Outro

Com que frequência toma o pequeno-almoço em família?

Diariamente Só aos fins de semana Raramente Nunca

Innovation in the positioning of Nutella

O que costuma tomar ao pequeno-almoço?

(Pode escolher várias opções)

Leite com cereais Leite com chocolate Leite simples Café Sumo Iogurte Batido Fruta Pão Torrada Bolo Outro

If used to have bread and/or toast:

O que costuma barrar / colocar no pão?

(Pode escolher várias opções)

Fiambre Queijo Manteiga / Margarina Nutella Tulicreme Outro creme de chocolate Doce/ Marmelada Creme de queijo Outro

O que costuma barrar / colocar na sua torrada?

(Pode escolher várias opções)

Fiambre Queijo Manteiga / Margarina Nutella Tulicreme Outro creme de chocolate Doce/ Marmelada Creme de queijo Outro

If have selected before “breakfast” as consumption moment:

Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?

Diariamente Três vezes por semana Ao fim de semana 1 vez por mês Raramente

Como CONSOME Nutella ao PEQUENO-ALMOÇO?

(Pode escolher várias opções)

No pão Em crepes Em bolachas Outro

Everyone:

Considera o pequeno-almoço um momento indicado para CONSUMIR Nutella?

Sim Não

If not:

Quais são os principais motivos para NÃO considerar o pequeno-almoço um momento indicado para o CONSUMO de Nutella?

Seleccione de 1 a 5 a importância que cada um dos motivos abaixo tem para que não se deva consumir Nutella ao pequeno-almoço.

	1 - Nada importante	2	3	4	5 - Muito importante
Preço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sabor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Não saudável	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Calorias	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alergias	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Innovation in the positioning of Nutella

Considera existir algum outro motivo para que NÃO se deva CONSUMIR Nutella ao pequeno-almoço?

	Selecione de 1 a 5 a importância que esse outro motivo tem para que não se deva consumir Nutella ao pequeno-almoço.				
	1 - Nada importante	2	3	4	5 - Muito importante
Outro <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

If yes:

Quais são os principais motivos para considerar o pequeno-almoço um momento indicado para o CONSUMO de Nutella?

	Selecione de 1 a 5 a importância que cada um dos motivos abaixo tem para que se deva consumir Nutella ao pequeno-almoço.				
	1 - Nada importante	2	3	4	5 - Muito importante
Preço	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sabor	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nutritivo	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Considera existir algum outro motivo para considerar o pequeno-almoço um momento indicado para consumir Nutella?

	Selecione de 1 a 5 a importância que esse outro motivo tem para que se deva consumir Nutella ao pequeno-almoço.				
	1 - Nada importante	2	3	4	5 - Muito importante
Outro <input type="text"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

IV - Caracterização sócio-demográfica

Sexo:

Feminino

Masculino

Idade:

Menos do que 18

18-35

36-55

Mais do que 55

If it is a Nutella shopper, but it is not a Nutella consumer:

Indique a idade dos consumidores a quem se destina a compra de Nutella:
(Pode escolher várias opções)

3-5	6-10	11-17	18-35	36-55	Mais do que 55
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If it is a Nutella shopper:

Indique a idade dos outros consumidores da sua compra de Nutella (caso não seja o(a) único(a) que consome):
(Pode escolher várias opções)

Não aplicável	3-5	6-10	11-17	18-35	36-55	Mais do que 55
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Nível de instrução:

1º Ciclo	2º Ciclo	3º Ciclo	Ensino Secundário	Ensino Superior
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Atividade profissional:

Estudante	Trabalhador -Estudante	Trabalhador por conta de outrem	Trabalhador por conta própria	Reformado	Desempregado
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

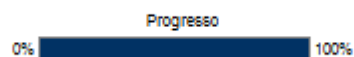
Número total de pessoas que compõe o seu agregado familiar:

1	2	3	4	5 ou +
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Rendimentos mensais do agregado familiar (brutos):

Menos do que 500€	500€ a 1000€	1001€ a 1500€	1501€ a 2000€	2001 a 2500€	Mais do que 2500€
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Agradecemos a sua participação neste inquérito.
A sua resposta foi registada.



Appendix 3 - Cross Tabulations and Frequencies Tables regarding Spreadable creams' purchase

Table A - Frequencies Table: Spreadable creams shopper

É COMPRADOR de cremes para barrar?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Sim	394	64,9	64,9	64,9
Não	213	35,1	35,1	100,0
Total	607	100,0	100,0	

Table B - Cross tabulation: Spreadable creams shopper and Gender

			Sexo		Total
			Feminino	Masculino	
Spreadable creams purchased ^a	Nutella	% within \$spreads	64,9%	35,1%	
		% within Sexo	49,1%	56,1%	
		% of Total	33,3%	18,0%	51,4%
	Tulicreme	% within \$spreads	52,0%	48,0%	
		% within Sexo	7,5%	14,6%	
		% of Total	5,1%	4,7%	9,8%
	Outro creme de chocolate	% within \$spreads	61,5%	38,5%	
		% within Sexo	4,6%	6,1%	
		% of Total	3,1%	2,0%	5,1%
	Manteiga / Margarina	% within \$spreads	67,6%	32,4%	
		% within Sexo	85,5%	86,6%	
		% of Total	58,0%	27,8%	85,9%
	Doce / Marmelada	% within \$spreads	64,6%	35,4%	
		% within Sexo	30,6%	35,4%	
		% of Total	20,8%	11,4%	32,2%
	Creme de queijo	% within \$spreads	83,3%	16,7%	
		% within Sexo	57,8%	24,4%	
		% of Total	39,2%	7,8%	47,1%
	Outro	% within \$spreads	90,0%	10,0%	
		% within Sexo	5,2%	1,2%	
		% of Total	3,5%	0,4%	3,9%
Total		% of Total	67,8%	32,2%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Table C - Cross tabulation: Spreadable creams shopper and Age

			Idade:				Total
			Menos do que 18	18-35	36-55	Mais do que 55	
É COMPRADOR de cremes para barrar?	Sim	Count	32	265	90	7	394
		% within É COMPRADOR de cremes para barrar?	8,1%	67,3%	22,8%	1,8%	100,0%
		% within Idade:	64,0%	65,1%	69,8%	33,3%	64,9%
		% of Total	5,3%	43,7%	14,8%	1,2%	64,9%
	Não	Count	18	142	39	14	213
		% within É COMPRADOR de cremes para barrar?	8,5%	66,7%	18,3%	6,6%	100,0%
		% within Idade:	36,0%	34,9%	30,2%	66,7%	35,1%
		% of Total	3,0%	23,4%	6,4%	2,3%	35,1%
Total	Count	50	407	129	21	607	
	% within É COMPRADOR de cremes para barrar?	8,2%	67,1%	21,3%	3,5%	100,0%	
	% within Idade:	100,0%	100,0%	100,0%	100,0%	100,0%	
	% of Total	8,2%	67,1%	21,3%	3,5%	100,0%	

Table D - Frequencies Table: Spreadable creams purchased

		Responses		Percent of Cases
		N	Percent	
Spreadable creams purchased ^a	Nutella	195	21,1%	49,5%
	Tulicreme	34	3,7%	8,6%
	Outro creme de chocolate	22	2,4%	5,6%
	Manteiga / Margarina	335	36,2%	85,0%
	Doce / Marmelada	127	13,7%	32,2%
	Creme de queijo	194	21,0%	49,2%
	Outro	18	1,9%	4,6%
Total		925	100,0%	234,8%

a. Dichotomy group tabulated at value 1.

Table E - Cross tabulation: Spreadable creams shopper and Nutella consumer

			CONSOME Nutella?		Total
			Sim	Não	
É COMPRADOR de cremes para barrar?	Sim	Count	233	161	394
		% within CONSOME Nutella?	78,5%	51,9%	64,9%
		% of Total	38,4%	26,5%	64,9%
	Não	Count	64	149	213
		% within CONSOME Nutella?	21,5%	48,1%	35,1%
		% of Total	10,5%	24,5%	35,1%
Total	Count	297	310	607	
	% within CONSOME Nutella?	100,0%	100,0%	100,0%	
	% of Total	48,9%	51,1%	100,0%	

Table F - Frequencies Table: Nutella purchase

		Nutella			
		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	195	32,1	100,0	100,0
Missing	System	412	67,9		
Total		607	100,0		

Innovation in the positioning of Nutella

Table G - Cross Tabulation: Spreadable creams purchased and Gender

			Sexo:		Total
			Feminino	Masculino	
Spreadable creams purchased ^a	Nutella	% within \$spreads	64,9%	35,1%	51,4%
		% of Total	33,3%	18,0%	
	Tulicreme	% within \$spreads	52,0%	48,0%	9,8%
		% of Total	5,1%	4,7%	
	Outro creme de chocolate	% within \$spreads	61,5%	38,5%	5,1%
		% of Total	3,1%	2,0%	
	Manteiga / Margarina	% within \$spreads	67,6%	32,4%	85,9%
		% of Total	58,0%	27,8%	
	Doce / Marmelada	% within \$spreads	64,6%	35,4%	32,2%
		% of Total	20,8%	11,4%	
	Creme de queijo	% within \$spreads	83,3%	16,7%	47,1%
		% of Total	39,2%	7,8%	
	Outro	% within \$spreads	90,0%	10,0%	3,9%
		% of Total	3,5%	0,4%	
Total		% of Total	67,8%	32,2%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Innovation in the positioning of Nutella

Table H - Cross Tabulation: Spreadable creams purchased and Age

			Idade:				Total
			Menos do que 18	18-35	36-55	Mais do que 55	
Spreadable creams purchased ^a	Nutella	Count	24	134	36	1	195
		% within \$spreads	12,3%	68,7%	18,5%	0,5%	
		% of Total	6,1%	34,0%	9,1%	0,3%	49,5%
	Tulicreme	Count	4	22	8	0	34
		% within \$spreads	11,8%	64,7%	23,5%	0,0%	
		% of Total	1,0%	5,6%	2,0%	0,0%	8,6%
	Outro creme de chocolate	Count	1	14	7	0	22
		% within \$spreads	4,5%	63,6%	31,8%	0,0%	
		% of Total	0,3%	3,6%	1,8%	0,0%	5,6%
	Manteiga / Margarina	Count	31	225	72	7	335
		% within \$spreads	9,3%	67,2%	21,5%	2,1%	
		% of Total	7,9%	57,1%	18,3%	1,8%	85,0%
	Doce / Marmelada	Count	7	87	31	2	127
		% within \$spreads	5,5%	68,5%	24,4%	1,6%	
		% of Total	1,8%	22,1%	7,9%	0,5%	32,2%
	Creme de queijo	Count	11	134	43	6	194
		% within \$spreads	5,7%	69,1%	22,2%	3,1%	
		% of Total	2,8%	34,0%	10,9%	1,5%	49,2%
	Outro	Count	0	10	7	1	18
		% within \$spreads	0,0%	55,6%	38,9%	5,6%	
		% of Total	0,0%	2,5%	1,8%	0,3%	4,6%
	Total	Count	32	265	90	7	394
		% of Total	8,1%	67,3%	22,8%	1,8%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Table I - Cross tabulation: Spreadable creams purchased and Education level

			Education level ²²				Total
			1,00	2,00	3,00	4,00	
Spreadable creams purchased ^a	Nutella	Count	2	15	36	142	195
		% within \$spreads	1,0%	7,7%	18,5%	72,8%	
		% of Total	0,5%	3,8%	9,1%	36,0%	49,5%
	Tulicreme	Count	0	4	2	28	34
		% within \$spreads	0,0%	11,8%	5,9%	82,4%	
		% of Total	0,0%	1,0%	0,5%	7,1%	8,6%
	Outro creme de chocolate	Count	0	3	4	15	22
		% within \$spreads	0,0%	13,6%	18,2%	68,2%	
		% of Total	0,0%	0,8%	1,0%	3,8%	5,6%
	Manteiga / Margarina	Count	4	24	55	252	335
		% within \$spreads	1,2%	7,2%	16,4%	75,2%	
		% of Total	1,0%	6,1%	14,0%	64,0%	85,0%
	Doce / Marmelada	Count	0	8	19	100	127
		% within \$spreads	0,0%	6,3%	15,0%	78,7%	
		% of Total	0,0%	2,0%	4,8%	25,4%	32,2%
	Creme de queijo	Count	2	11	25	156	194
		% within \$spreads	1,0%	5,7%	12,9%	80,4%	
		% of Total	0,5%	2,8%	6,3%	39,6%	49,2%
	Outro	Count	0	1	6	11	18
		% within \$spreads	0,0%	5,6%	33,3%	61,1%	
		% of Total	0,0%	0,3%	1,5%	2,8%	4,6%
	Total	Count	5	26	64	299	394
		% of Total	1,3%	6,6%	16,2%	75,9%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

²² 1,00 = 1º Ciclo + 2º Ciclo (Elementary School); 2,00 = 3º Ciclo (Middle School); 3,00 = Ensino Secundário (High School); 4,00 = Ensino Superior (Higher Education)

Table J - Cross tabulation: Spreadable creams purchased and Professional activity

			Atividade profissional:					Total
			Estudante	Trabalhador - Estudante	Trabalhador por conta de outrem	Trabalhador por conta própria	Reformado	
Spreadable creams purchased ^a	Nutella	Count	57	18	104	9	0	188
		% within \$spreads	30,3%	9,6%	55,3%	4,8%	0,0%	
		% of Total	14,9%	4,7%	27,2%	2,4%	0,0%	49,2%
	Tulicreme	Count	7	2	24	1	0	34
		% within \$spreads	20,6%	5,9%	70,6%	2,9%	0,0%	
		% of Total	1,8%	0,5%	6,3%	0,3%	0,0%	8,9%
	Outro creme de chocolate	Count	4	3	13	2	0	22
		% within \$spreads	18,2%	13,6%	59,1%	9,1%	0,0%	
		% of Total	1,0%	0,8%	3,4%	0,5%	0,0%	5,8%
	Manteiga / Margarina	Count	87	30	194	13	0	324
		% within \$spreads	26,9%	9,3%	59,9%	4,0%	0,0%	
		% of Total	22,8%	7,9%	50,8%	3,4%	0,0%	84,8%
	Doce / Marmelada	Count	33	9	77	4	0	123
		% within \$spreads	26,8%	7,3%	62,6%	3,3%	0,0%	
		% of Total	8,6%	2,4%	20,2%	1,0%	0,0%	32,2%
	Creme de queijo	Count	36	23	117	10	1	187
		% within \$spreads	19,3%	12,3%	62,6%	5,3%	0,5%	
		% of Total	9,4%	6,0%	30,6%	2,6%	0,3%	49,0%
	Outro	Count	1	3	11	2	0	17
		% within \$spreads	5,9%	17,6%	64,7%	11,8%	0,0%	
		% of Total	0,3%	0,8%	2,9%	0,5%	0,0%	4,5%
Total		Count	94	41	229	17	1	382
		% of Total	24,6%	10,7%	59,9%	4,5%	0,3%	100%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Table K - Cross tabulation: Spreadable creams purchased and Household composition

			Número total de pessoas que compõe o seu agregado familiar:					Total
			1	2	3	4	5 ou +	
Spreadable creams purchased ^a	Nutella	Count	11	34	44	80	26	195
		% within \$spreads	5,6%	17,4%	22,6%	41,0%	13,3%	
		% of Total	2,8%	8,6%	11,2%	20,3%	6,6%	49,5%
	Tulicreme	Count	3	8	6	10	7	34
		% within \$spreads	8,8%	23,5%	17,6%	29,4%	20,6%	
		% of Total	0,8%	2,0%	1,5%	2,5%	1,8%	8,6%
	Outro creme de chocolate	Count	4	2	6	8	2	22
		% within \$spreads	18,2%	9,1%	27,3%	36,4%	9,1%	
		% of Total	1,0%	0,5%	1,5%	2,0%	0,5%	5,6%
	Manteiga / Margarina	Count	29	66	84	116	40	335
		% within \$spreads	8,7%	19,7%	25,1%	34,6%	11,9%	
		% of Total	7,4%	16,8%	21,3%	29,4%	10,2%	85,0%
	Doce / Marmelada	Count	9	22	36	47	13	127
		% within \$spreads	7,1%	17,3%	28,3%	37,0%	10,2%	
		% of Total	2,3%	5,6%	9,1%	11,9%	3,3%	32,2%
	Creme de queijo	Count	18	49	44	64	19	194
		% within \$spreads	9,3%	25,3%	22,7%	33,0%	9,8%	
		% of Total	4,6%	12,4%	11,2%	16,2%	4,8%	49,2%
	Outro	Count	3	7	5	2	1	18
		% within \$spreads	16,7%	38,9%	27,8%	11,1%	5,6%	
		% of Total	0,8%	1,8%	1,3%	0,5%	0,3%	4,6%
	Total	Count	35	83	99	135	42	394
		% of Total	8,9%	21,1%	25,1%	34,3%	10,7%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Innovation in the positioning of Nutella

Table L - Cross tabulation: Spreadable creams purchased and Monthly gross household income

			Rendimentos mensais do agregado familiar (brutos):					Total	
			Menos do que 500€	500€ a 1000€	1001€ a 1500€	1500€ a 2000€	2001 a 2500€		Mais do que 2500€
Spreadable Creams Purchased ^a	Nutella	Count	6	28	29	46	30	51	190
		% within \$spreads	3,2%	14,7%	15,3%	24,2%	15,8%	26,8%	
		% of Total	1,6%	7,3%	7,6%	12,0%	7,8%	13,3%	
	Tulicreme	Count	1	6	4	9	6	7	33
		% within \$spreads	3,0%	18,2%	12,1%	27,3%	18,2%	21,2%	
		% of Total	0,3%	1,6%	1,0%	2,3%	1,6%	1,8%	
	Outro creme de chocolate	Count	1	8	6	4	1	2	22
		% within \$spreads	4,5%	36,4%	27,3%	18,2%	4,5%	9,1%	
		% of Total	0,3%	2,1%	1,6%	1,0%	0,3%	0,5%	
	Manteiga / Margarina	Count	6	53	58	74	49	86	326
		% within \$spreads	1,8%	16,3%	17,8%	22,7%	15,0%	26,4%	
		% of Total	1,6%	13,8%	15,1%	19,3%	12,8%	22,5%	
	Doce / Mamelada	Count	1	20	22	27	23	32	125
		% within \$spreads	0,8%	16,0%	17,6%	21,6%	18,4%	25,6%	
		% of Total	0,3%	5,2%	5,7%	7,0%	6,0%	8,4%	
Creme de queijo	Count	3	30	33	34	30	58	188	
	% within \$spreads	1,6%	16,0%	17,6%	18,1%	16,0%	30,9%		
	% of Total	0,8%	7,8%	8,6%	8,9%	7,8%	15,1%		49,1%
Outro	Count	0	3	3	6	2	3	17	
	% within \$spreads	0,0%	17,6%	17,6%	35,3%	11,8%	17,6%		
	% of Total	0,0%	0,8%	0,8%	1,6%	0,5%	0,8%		4,4%
Total	Count	9	60	67	88	60	99	383	
	% of Total	2,3%	15,7%	17,5%	23,0%	15,7%	25,8%		100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Innovation in the positioning of Nutella

Table M - Cross tabulation: Spreadable creams purchased and Nutella consumption

			CONSUME Nutella?		Total
			Sim	Não	
Spreadable creams purchased ^a	Nutella	Count	190	5	195
		% within \$spreads	97,4%	2,6%	
		% of Total	48,2%	1,3%	49,5%
	Tulicreme	Count	22	12	34
		% within \$spreads	64,7%	35,3%	
		% of Total	5,6%	3,0%	8,6%
	Outro creme de chocolate	Count	12	10	22
		% within \$spreads	54,5%	45,5%	
		% of Total	3,0%	2,5%	5,6%
	Manteiga / Margarina	Count	206	129	335
		% within \$spreads	61,5%	38,5%	
		% of Total	52,3%	32,7%	85,0%
	Doce / Marmelada	Count	86	41	127
		% within \$spreads	67,7%	32,3%	
		% of Total	21,8%	10,4%	32,2%
	Creme de queijo	Count	106	88	194
		% within \$spreads	54,6%	45,4%	
		% of Total	26,9%	22,3%	49,2%
Outro	Count	5	13	18	
	% within \$spreads	27,8%	72,2%		
	% of Total	1,3%	3,3%	4,6%	
Total	Count	233	161	394	
	% of Total	59,1%	40,9%	100,0%	

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Innovation in the positioning of Nutella

Table N - Cross tabulation: Nutella purchase frequency and Age

		Idade:				Total	
		Menos do que 18	18-35	36-55	Mais do que 55		
Com que frequência COMPRA Nutella?	Semanalmente	Count	2	1	1	0	4
		% within Com que frequência COMPRA Nutella?	50,0%	25,0%	25,0%	0,0%	100,0%
		% within Idade:	8,3%	0,7%	2,8%	0,0%	2,1%
		% of Total	1,0%	0,5%	0,5%	0,0%	2,1%
Com que frequência COMPRA Nutella?	Quinzenalmente	Count	4	6	4	1	15
		% within Com que frequência COMPRA Nutella?	26,7%	40,0%	26,7%	6,7%	100,0%
		% within Idade:	16,7%	4,5%	11,1%	100,0%	7,7%
		% of Total	2,1%	3,1%	2,1%	0,5%	7,7%
Com que frequência COMPRA Nutella?	Mensalmente	Count	5	40	14	0	59
		% within Com que frequência COMPRA Nutella?	8,5%	67,8%	23,7%	0,0%	100,0%
		% within Idade:	20,8%	29,9%	38,9%	0,0%	30,3%
		% of Total	2,6%	20,5%	7,2%	0,0%	30,3%
Com que frequência COMPRA Nutella?	Trimestralmente	Count	5	46	8	0	59
		% within Com que frequência COMPRA Nutella?	8,5%	78,0%	13,6%	0,0%	100,0%
		% within Idade:	20,8%	34,3%	22,2%	0,0%	30,3%
		% of Total	2,6%	23,6%	4,1%	0,0%	30,3%
Com que frequência COMPRA Nutella?	Raramente	Count	8	41	9	0	58
		% within Com que frequência COMPRA Nutella?	13,8%	70,7%	15,5%	0,0%	100,0%
		% within Idade:	33,3%	30,6%	25,0%	0,0%	29,7%
		% of Total	4,1%	21,0%	4,6%	0,0%	29,7%
Total		Count	24	134	36	1	195
		% within Com que frequência COMPRA Nutella?	12,3%	68,7%	18,5%	0,5%	100,0%
		% within Idade:	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	12,3%	68,7%	18,5%	0,5%	100,0%

Table O - Cross tabulation: Nutella purchase frequency and Gender

			Sexo		Total
			Feminino	Masculino	
Com que frequência COMPRA Nutella?	Semanalmente	% within Com que frequência COMPRA Nutella?	33,3%	66,7%	100,0%
		% within Sexo:	1,2%	4,3%	2,3%
		% of Total	0,8%	1,5%	2,3%
	Quinzenalmente	% within Com que frequência COMPRA Nutella?	27,3%	72,7%	100,0%
		% within Sexo:	3,5%	17,4%	8,4%
		% of Total	2,3%	6,1%	8,4%
	Mensalmente	% within Com que frequência COMPRA Nutella?	62,2%	37,8%	100,0%
		% within Sexo:	27,1%	30,4%	28,2%
		% of Total	17,6%	10,7%	28,2%
	Trimestralmente	% within Com que frequência COMPRA Nutella?	67,5%	32,5%	100,0%
		% within Sexo:	31,8%	28,3%	30,5%
		% of Total	20,6%	9,9%	30,5%
Raramente	% within Com que frequência COMPRA Nutella?	77,5%	22,5%	100,0%	
	% within Sexo:	36,5%	19,6%	30,5%	
	% of Total	23,7%	6,9%	30,5%	
Total	% within Com que frequência COMPRA Nutella?	64,9%	35,1%	100,0%	
	% within Sexo:	100,0%	100,0%	100,0%	
	% of Total	64,9%	35,1%	100,0%	

Innovation in the positioning of Nutella

Table P - Cross tabulation: Nutella purchase frequency and Monthly gross household income

			Rendimentos mensais do agregado familiar (brutos):						Total
			Menos do que 500€	500€ a 1000€	1001€ a 1500€	1500€ a 2000€	2001 a 2500€	Mais do que 2500€	
Com que frequência COMPRA Nutella?	Semanalmente	Count	1	1	2	0	0	0	4
		% within Com que frequência COMPRA Nutella?	25,0%	25,0%	50,0%	0,0%	0,0%	0,0%	100,0%
		% within Rendimentos mensais do agregado familiar (brutos):	16,7%	3,6%	6,9%	0,0%	0,0%	0,0%	2,1%
		% of Total	0,5%	0,5%	1,1%	0,0%	0,0%	0,0%	2,1%
	Quinzenalmente	Count	0	2	5	3	0	5	15
		% within Com que frequência COMPRA Nutella?	0,0%	13,3%	33,3%	20,0%	0,0%	33,3%	100,0%
		% within Rendimentos mensais do agregado familiar (brutos):	0,0%	7,1%	17,2%	6,5%	0,0%	9,8%	7,9%
		% of Total	0,0%	1,1%	2,6%	1,6%	0,0%	2,6%	7,9%
	Mensalmente	Count	2	6	9	19	11	11	58
		% within Com que frequência COMPRA Nutella?	3,4%	10,3%	15,5%	32,8%	19,0%	19,0%	100,0%
		% within Rendimentos mensais do agregado familiar (brutos):	33,3%	21,4%	31,0%	41,3%	36,7%	21,6%	30,5%
		% of Total	1,1%	3,2%	4,7%	10,0%	5,8%	5,8%	30,5%
	Trimestralmente	Count	1	10	7	10	10	20	58
		% within Com que frequência COMPRA Nutella?	1,7%	17,2%	12,1%	17,2%	17,2%	34,5%	100,0%
		% within Rendimentos mensais do agregado familiar (brutos):	16,7%	35,7%	24,1%	21,7%	33,3%	39,2%	30,5%
		% of Total	0,5%	5,3%	3,7%	5,3%	5,3%	10,5%	30,5%
	Raramente	Count	2	9	6	14	9	15	55
		% within Com que frequência COMPRA Nutella?	3,6%	16,4%	10,9%	25,5%	16,4%	27,3%	100,0%
		% within Rendimentos mensais do agregado familiar (brutos):	33,3%	32,1%	20,7%	30,4%	30,0%	29,4%	28,9%
		% of Total	1,1%	4,7%	3,2%	7,4%	4,7%	7,9%	28,9%
Total		Count	6	28	29	46	30	51	190
		% within Com que frequência COMPRA Nutella?	3,2%	14,7%	15,3%	24,2%	15,8%	26,8%	100,0%
		% within Rendimentos mensais do agregado familiar (brutos):	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	3,2%	14,7%	15,3%	24,2%	15,8%	26,8%	100,0%

Innovation in the positioning of Nutella

Table Q - Cross tabulation: Nutella purchase frequency and Household composition

		Número total de pessoas que compõe o seu agregado familiar:					Total	
		1	2	3	4	5 ou +		
Com que frequência COMPRA Nutella?	Semanalmente	Count	1	0	1	2	0	4
		% within Com que frequência COMPRA Nutella?	25,0%	0,0%	25,0%	50,0%	0,0%	100,0%
		% of Total	0,5%	0,0%	0,5%	1,0%	0,0%	2,1%
	Quinzenalmente	Count	0	2	2	8	3	15
		% within Com que frequência COMPRA Nutella?	0,0%	13,3%	13,3%	53,3%	20,0%	100,0%
		% of Total	0,0%	1,0%	1,0%	4,1%	1,5%	7,7%
	Mensalmente	Count	1	7	19	25	7	59
		% within Com que frequência COMPRA Nutella?	1,7%	11,9%	32,2%	42,4%	11,9%	100,0%
		% of Total	0,5%	3,6%	9,7%	12,8%	3,6%	30,3%
	Trimestralmente	Count	3	11	13	23	9	59
		% within Com que frequência COMPRA Nutella?	5,1%	18,6%	22,0%	39,0%	15,3%	100,0%
		% of Total	1,5%	5,6%	6,7%	11,8%	4,6%	30,3%
	Raramente	Count	6	14	9	22	7	58
		% within Com que frequência COMPRA Nutella?	10,3%	24,1%	15,5%	37,9%	12,1%	100,0%
		% of Total	3,1%	7,2%	4,6%	11,3%	3,6%	29,7%
	Total	Count	11	34	44	80	26	195
		% within Com que frequência COMPRA Nutella?	5,6%	17,4%	22,6%	41,0%	13,3%	100,0%
		% of Total	5,6%	17,4%	22,6%	41,0%	13,3%	100,0%

Table R - Cross tabulation: Nutella package type purchased and Nutella purchase frequency

			Com que frequência COMPRA Nutella?					
			Semanal mente	Quinzenal mente	Mensal mente	Trimestral mente	Raramente	Total
package_type ^a Cup 200g	Count		1	5	16	13	21	56
	% within \$package_type		1,8%	8,9%	28,6%	23,2%	37,5%	
	% within Com que frequência COMPRA Nutella?		25,0%	33,3%	27,1%	22,0%	36,2%	
	% of Total		0,5%	2,6%	8,2%	6,7%	10,8%	28,7%
Package 400g	Count		2	10	37	46	39	134
	% within \$package_type		1,5%	7,5%	27,6%	34,3%	29,1%	
	% within Com que frequência COMPRA Nutella?		50,0%	66,7%	62,7%	78,0%	67,2%	
	% of Total		1,0%	5,1%	19,0%	23,6%	20,0%	68,7%
Package 630g	Count		2	0	7	8	1	18
	% within \$package_type		11,1%	0,0%	38,9%	44,4%	5,6%	
	% within Com que frequência COMPRA Nutella?		50,0%	0,0%	11,9%	13,6%	1,7%	
	% of Total		1,0%	0,0%	3,6%	4,1%	0,5%	9,2%
Total	Count		4	15	59	59	58	195
	% of Total		2,1%	7,7%	30,3%	30,3%	29,7%	100,0%

Table S - Frequencies table: End use of Nutella

		Responses		Percent of Cases
		N	Percent	
ConsumptionPurpose ^a	Pequeno-almoço	64	17,5%	32,8%
	Lanche	140	38,3%	71,8%
	Snack	85	23,2%	43,6%
	Sobremesa	48	13,1%	24,6%
	Festas	29	7,9%	14,9%
Total		366	100,0%	187,7%

a. Dichotomy group tabulated at value 1.

Table T - Frequencies table: End use of Nutella as breakfast

Qual é a finalidade de consumo da sua COMPRA? (Pode escolher várias opções)-Pequeno-Almoço

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1	64	10,5	100,0	100,0
Missing System	543	89,5		
Total	607	100,0		

Table U - Cross tabulation: End use of Nutella and Consumers type (Adapted)

	Adultos		Crianças		Ambos		Total	
Pequeno-almoço	40	43%	24	26%	30	32%	64	100%
Lanche	92	46%	49	24%	61	30%	140	100%
Snack	59	50%	27	23%	31	27%	85	100%
Sobremesa	38	59%	10	16%	16	25%	48	100%
Festas	18	40%	12	26%	15	34%	29	100%
Total	131	48%	65	24%	77	28%	195	100%

Table V - Cross tabulation: End use of Nutella purpose and Gender

			Sexo:		Total
			Feminino	Masculino	
ConsumptionPurpose ^a	Pequeno-almoço	% within \$ConsumptionPurpose	59,1%	40,9%	33,6%
		% of Total	19,8%	13,7%	
	Lanche	% within \$ConsumptionPurpose	66,3%	33,7%	70,2%
		% of Total	46,6%	23,7%	
	Snack	% within \$ConsumptionPurpose	58,9%	41,1%	42,7%
		% of Total	25,2%	17,6%	
	Sobremesa	% within \$ConsumptionPurpose	79,3%	20,7%	22,1%
		% of Total	17,6%	4,6%	
	Festas	% within \$ConsumptionPurpose	57,9%	42,1%	14,5%
		% of Total	8,4%	6,1%	
Total		% of Total	64,9%	35,1%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Table W - Frequencies table: Age distribution of the other consumers who benefited from Nutella purchase without purchasing it

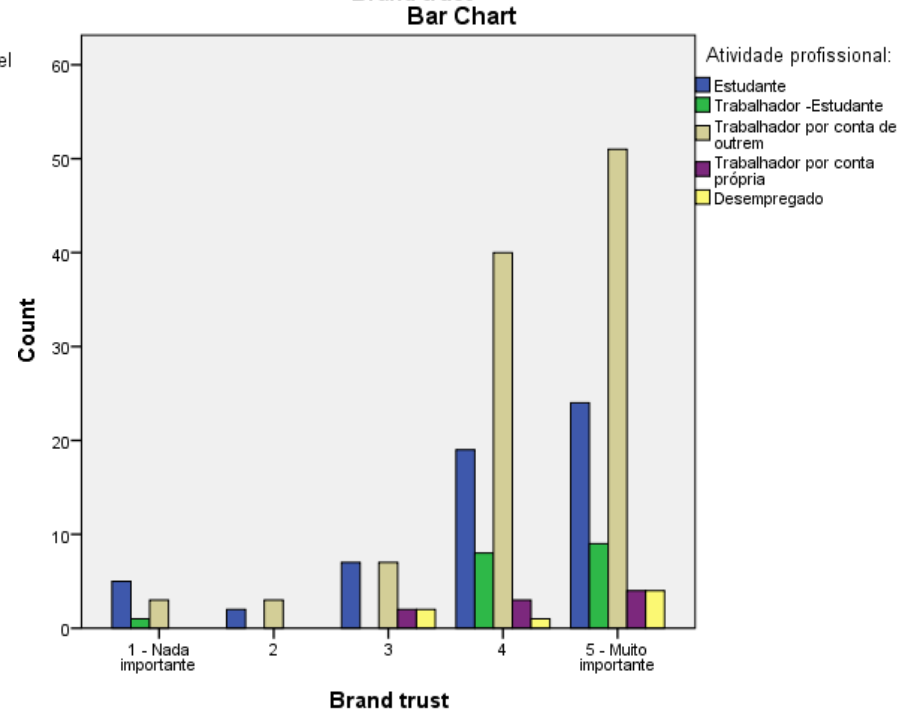
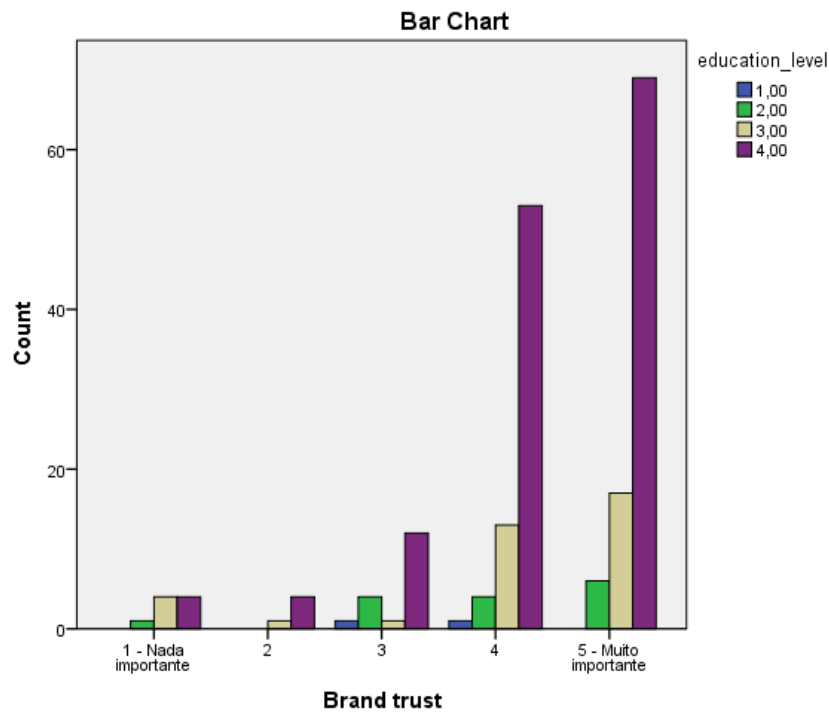
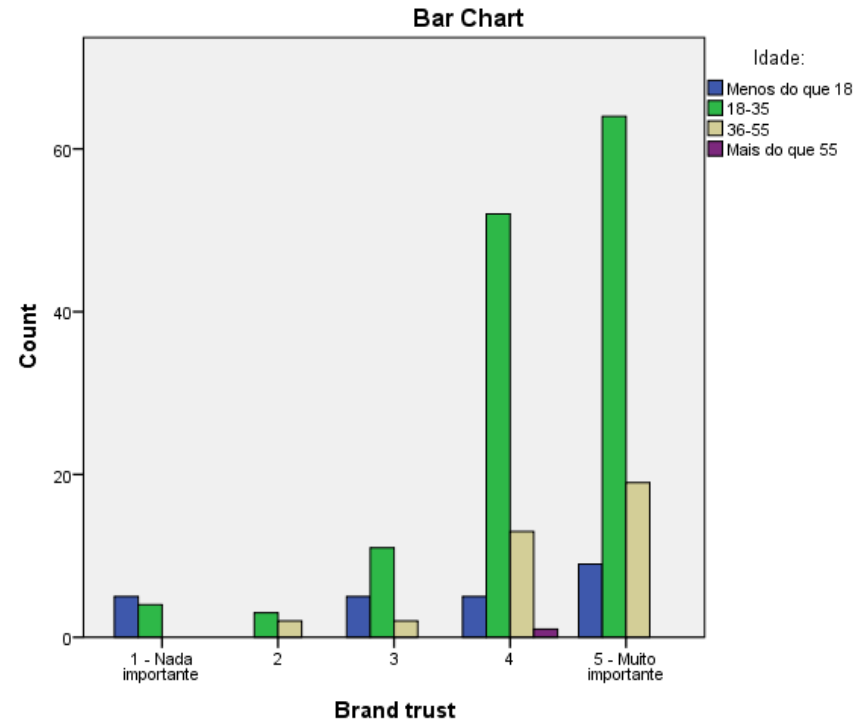
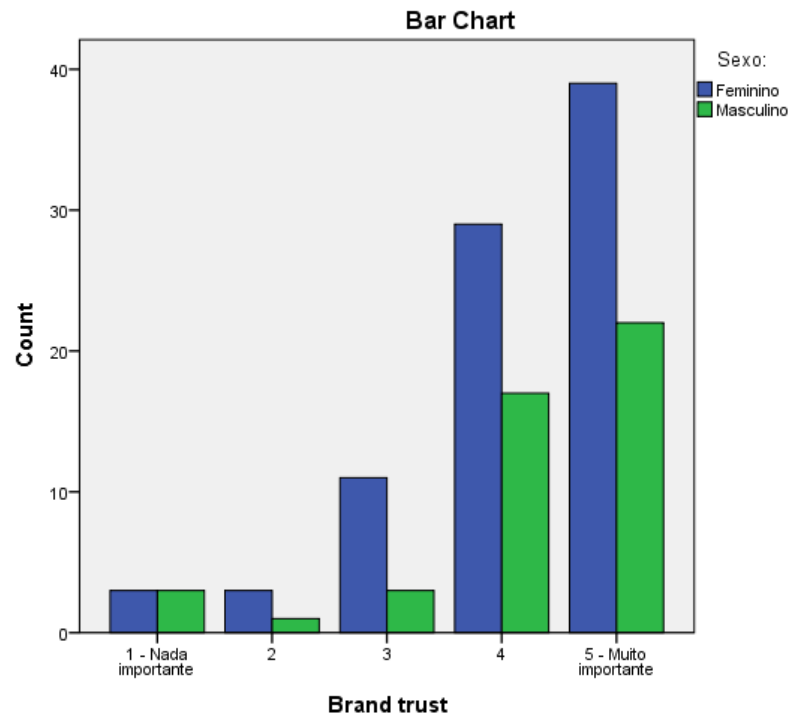
		Responses		Percent of Cases
		N	Percent	
other_consumers_age ^a	3-5	14	5,5%	8,1%
	6-10	30	11,7%	17,4%
	11-17	46	18,0%	26,7%
	18-35	96	37,5%	55,8%
	36-55	64	25,0%	37,2%
	Mais do que 55	6	2,3%	3,5%
	Total	256 ²³	100,0%	148,8%

a. Dichotomy group tabulated at value 1.

²³ Additionally, 19 respondents selected "Not applicable", making 275 responses

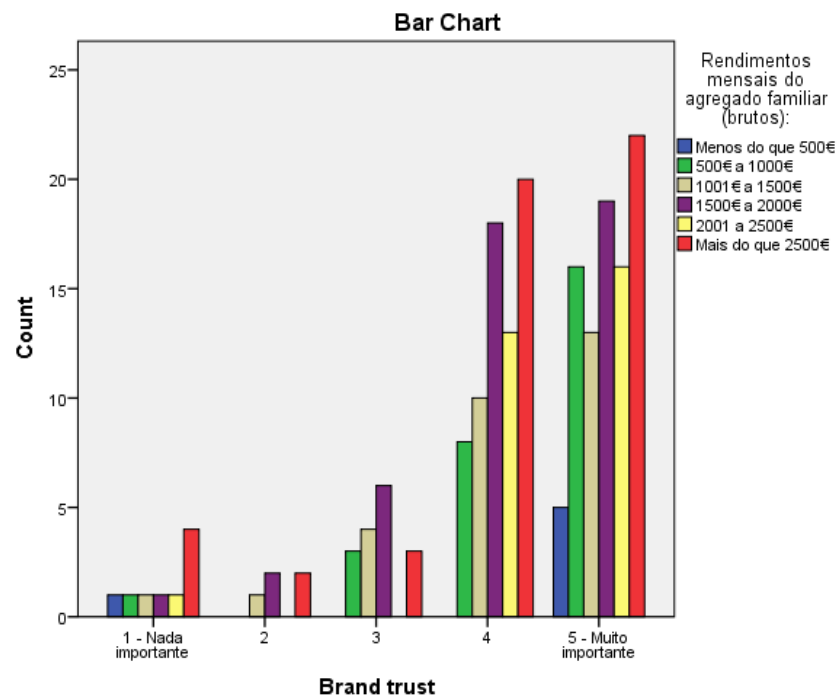
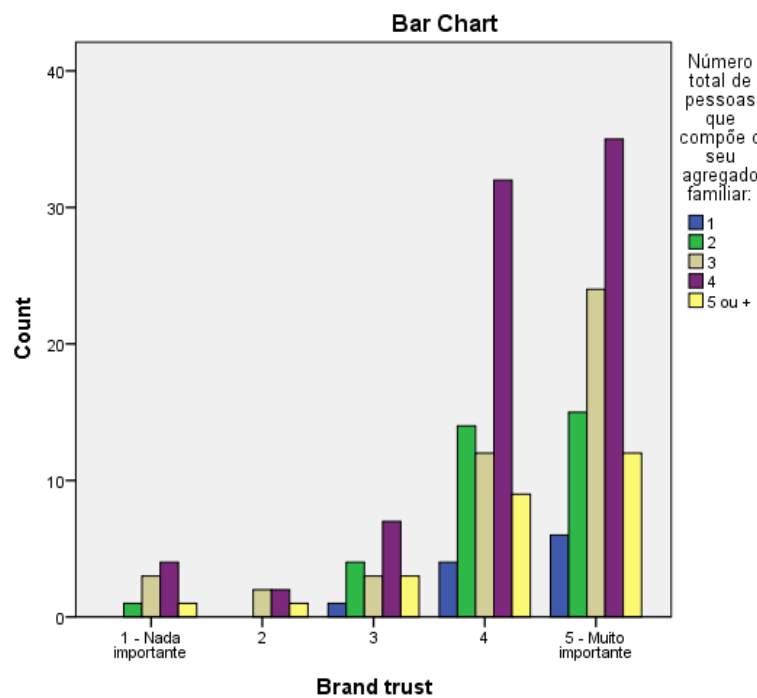
Appendix 4 - Graphics regarding the influence of socio-demographic characteristics on motives to purchase Nutella

Set of graphics 1 - Influence of socio-demographic characteristics on *Brand trust* motive

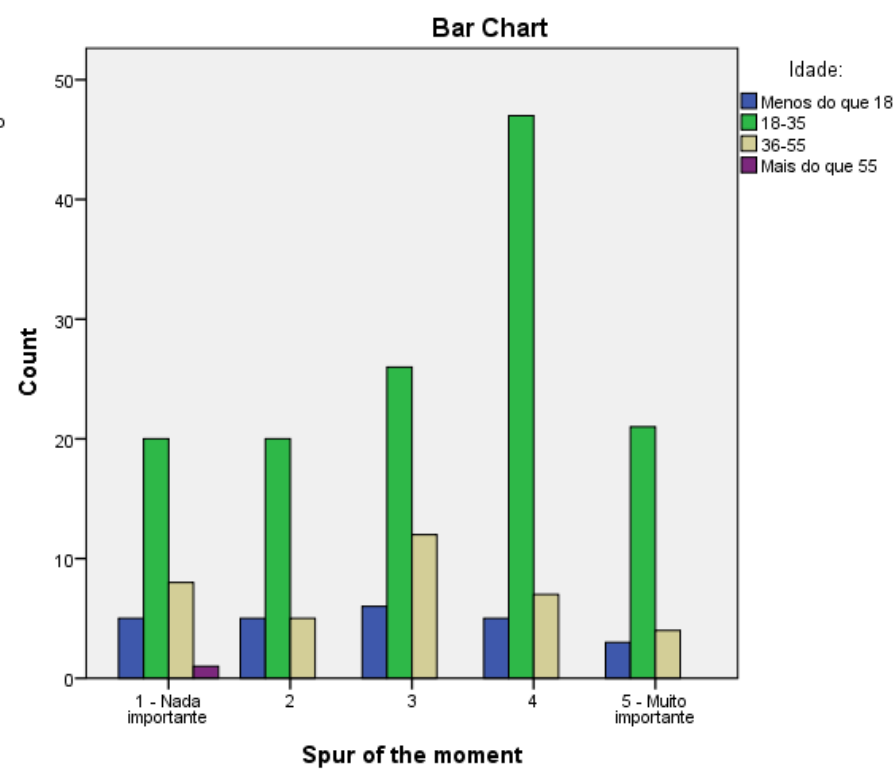
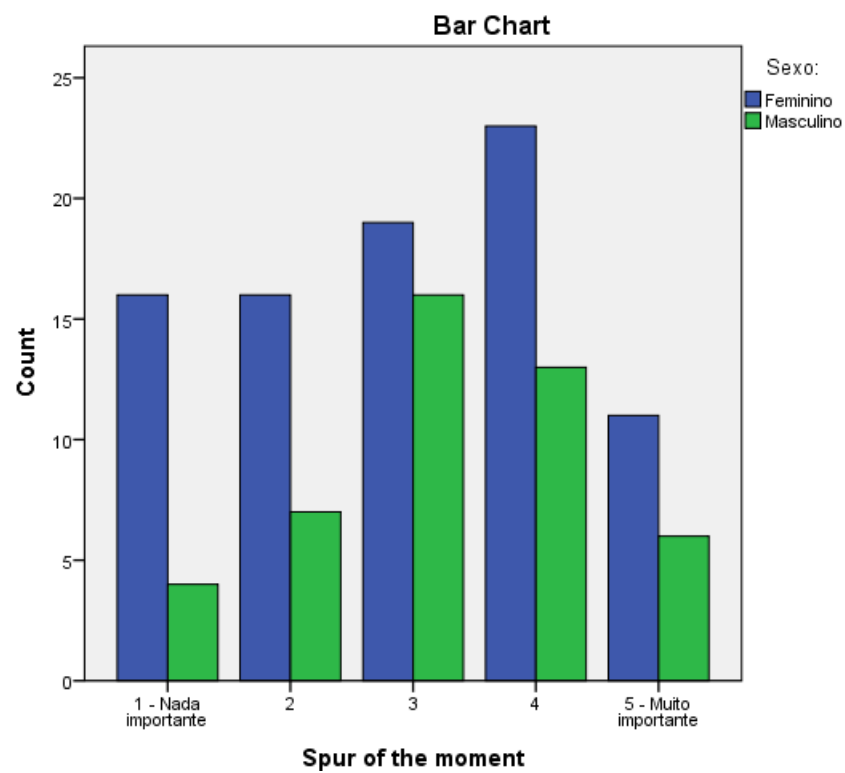


1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).

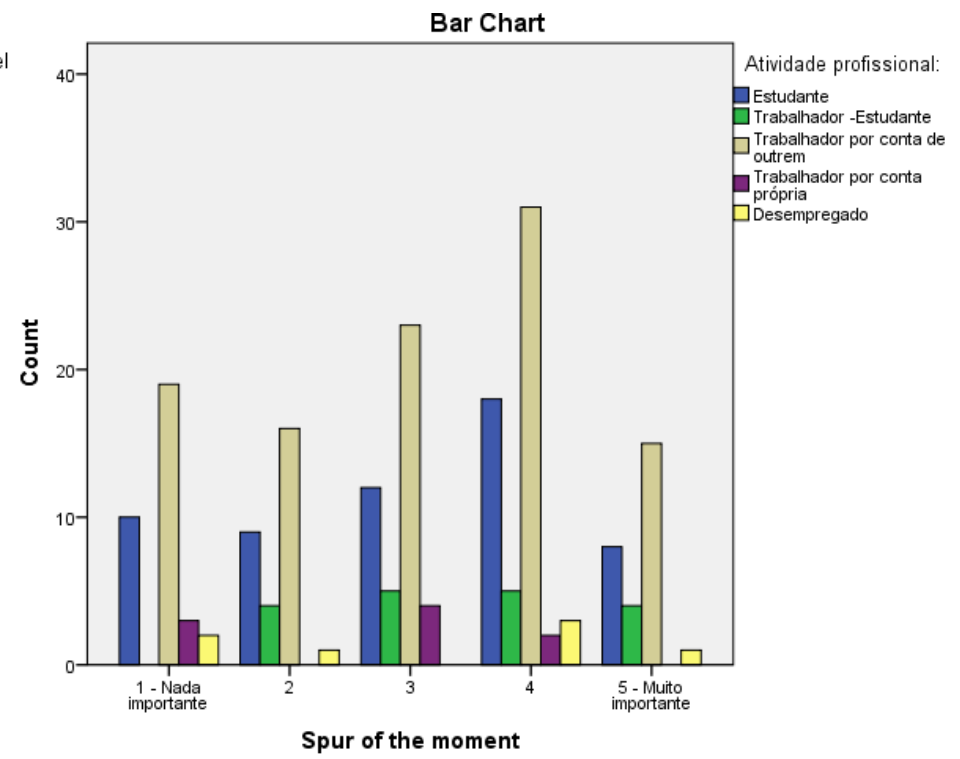
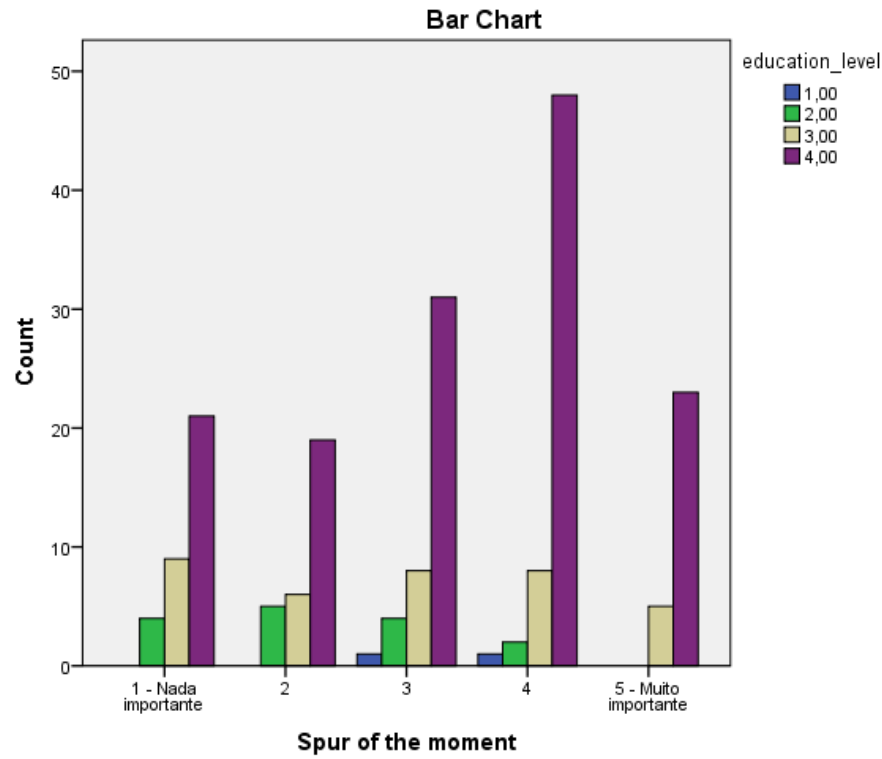
Innovation in the positioning of Nutella



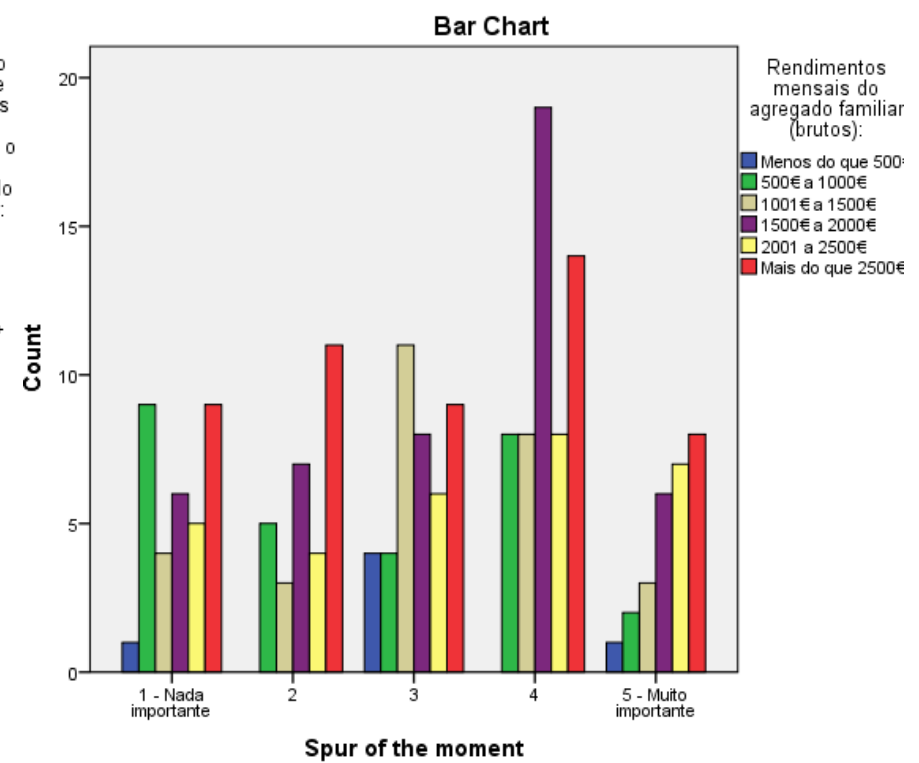
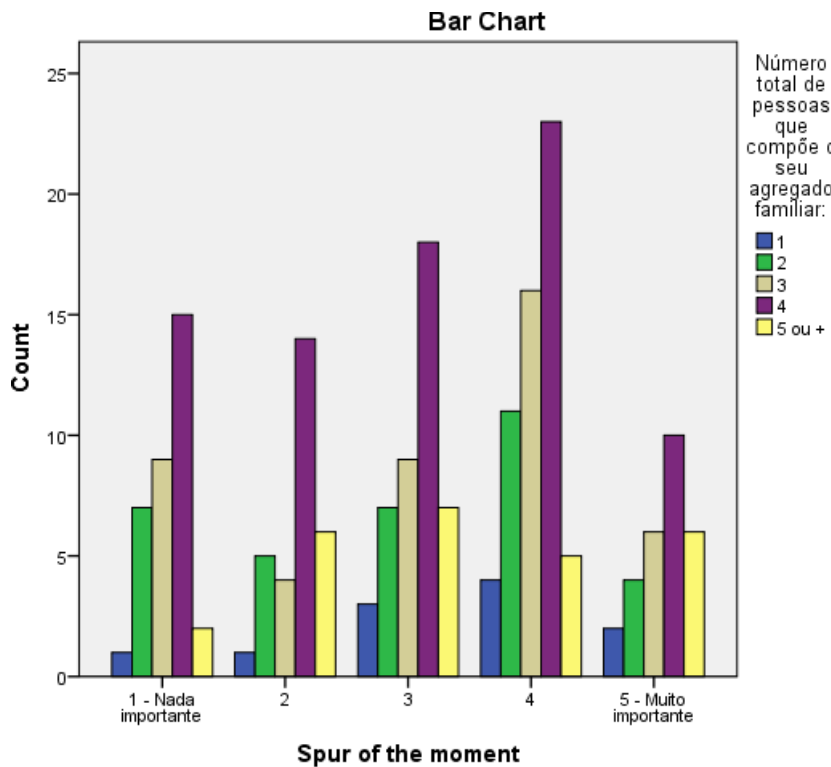
Set of graphics 2 - Influence of socio-demographic characteristics on “*Spur of the moment*” motive



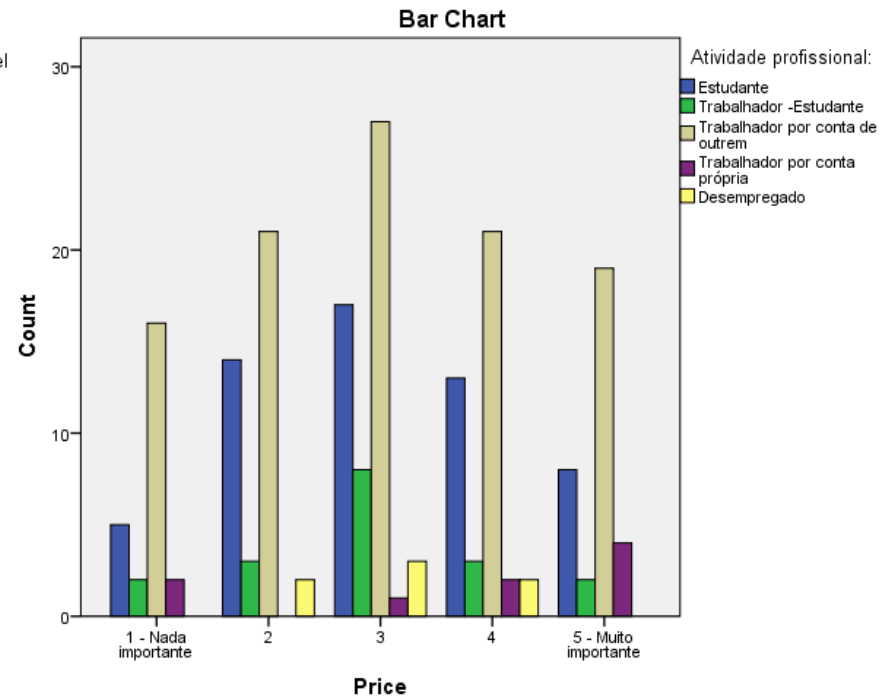
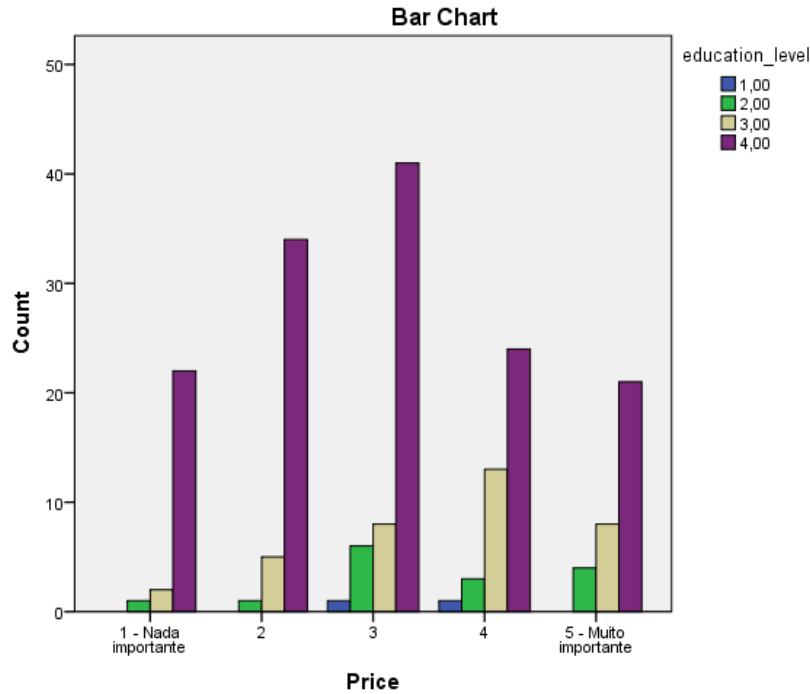
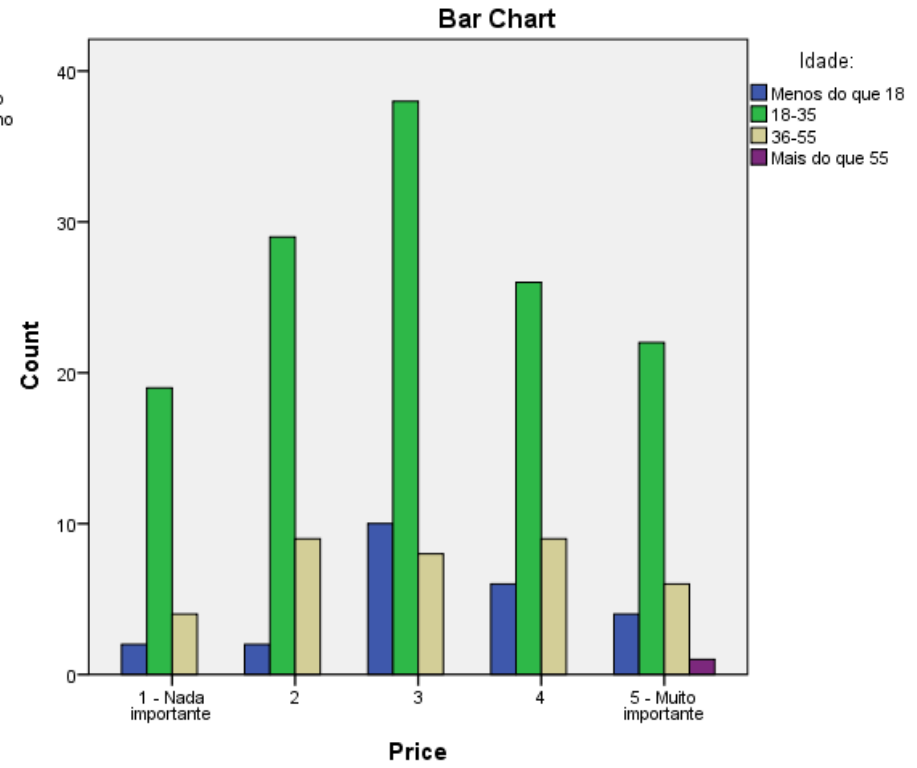
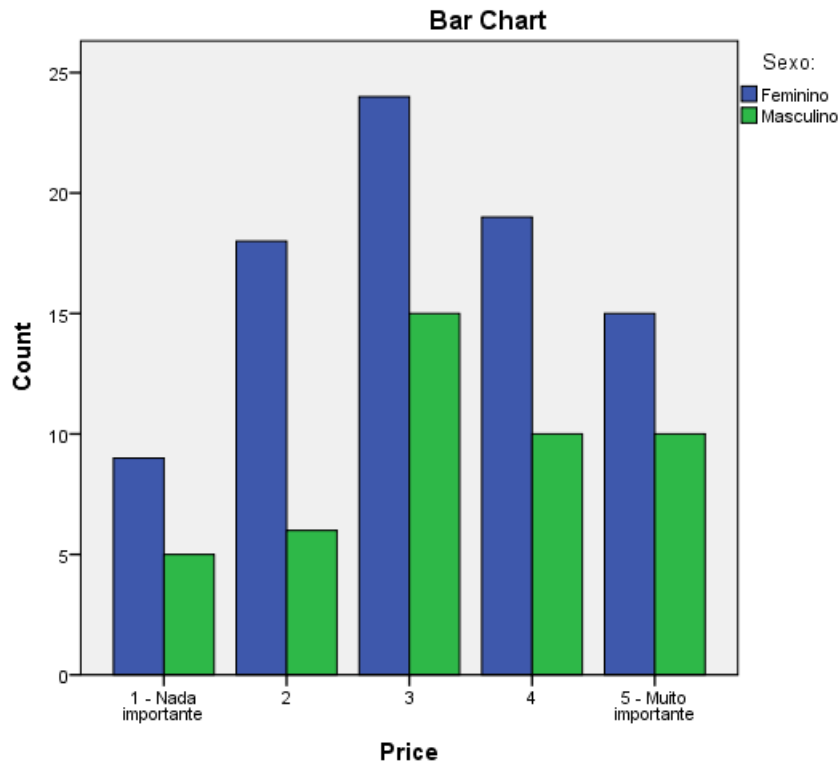
Innovation in the positioning of Nutella



1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).

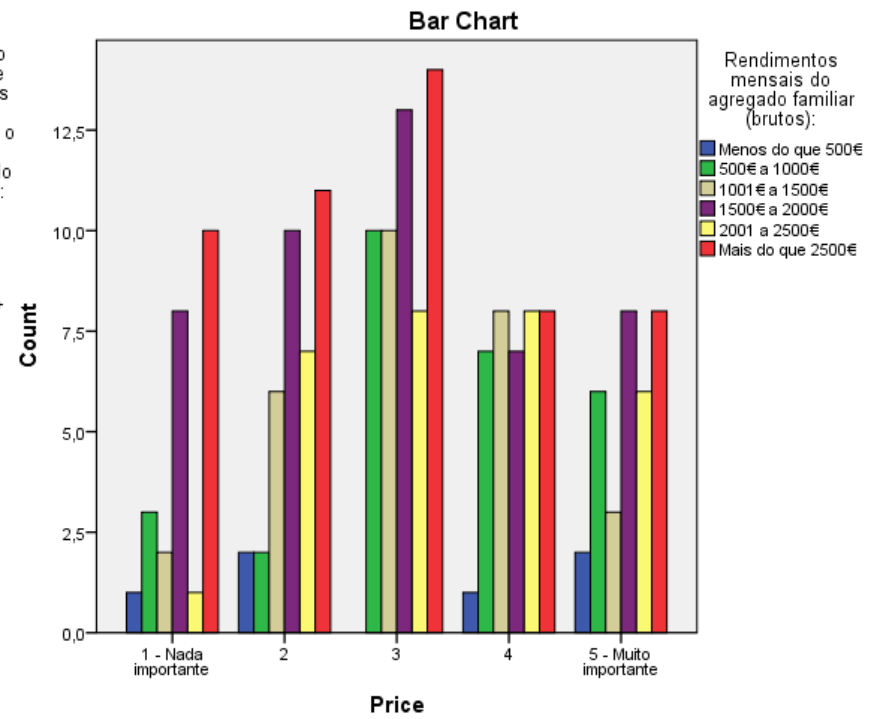
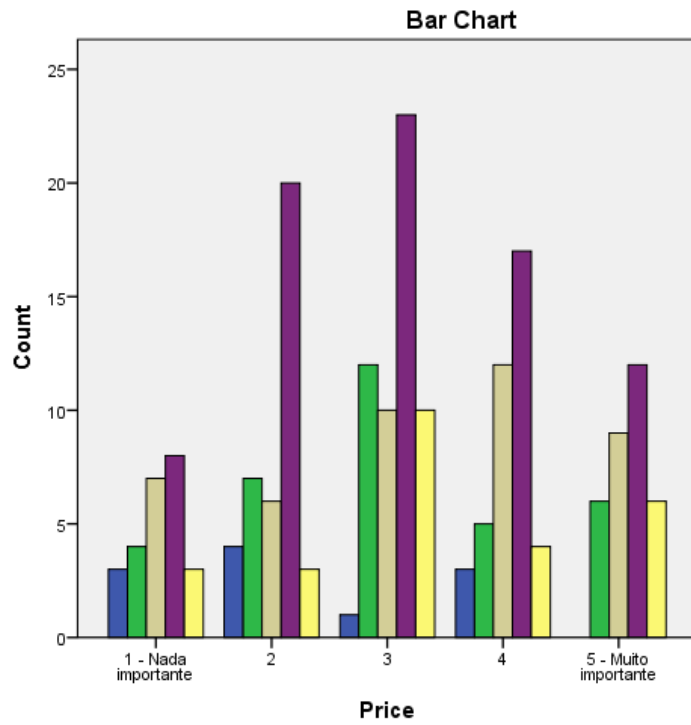


Set of graphics 3 - Influence of socio-demographic characteristics on *Price* motive

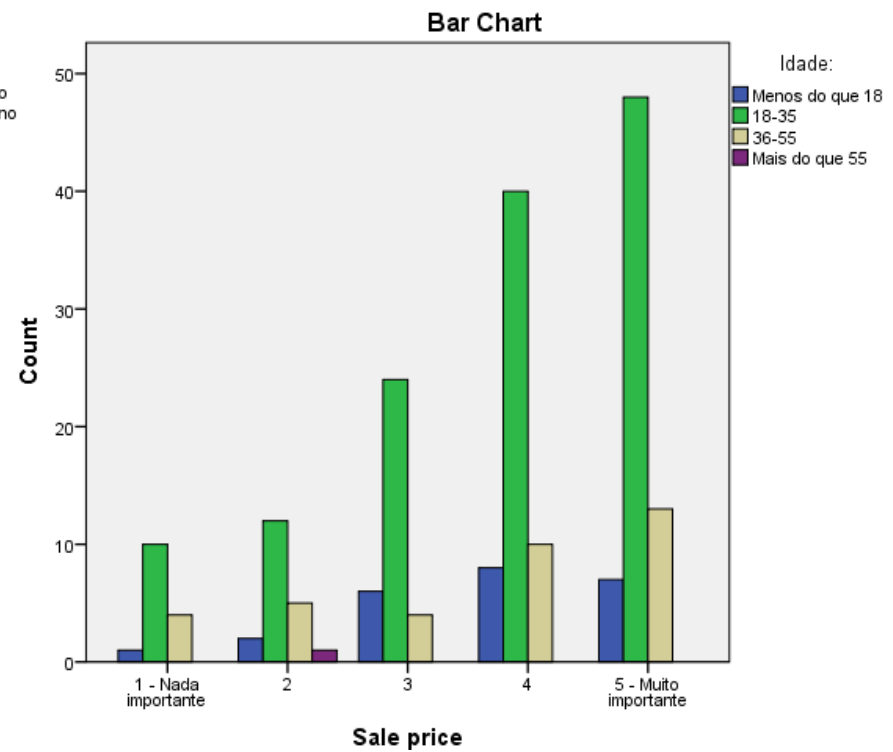
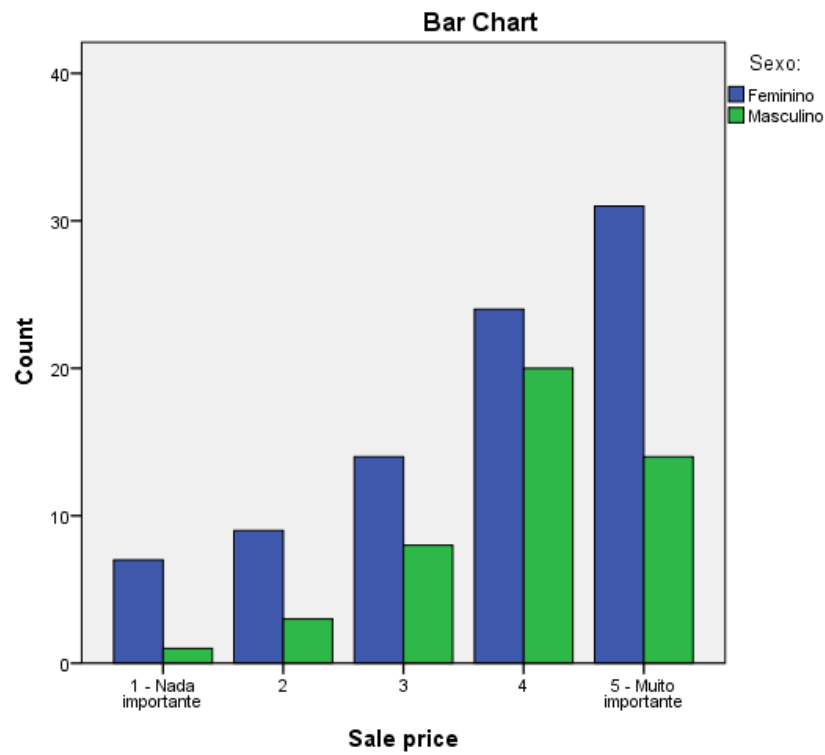


1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).

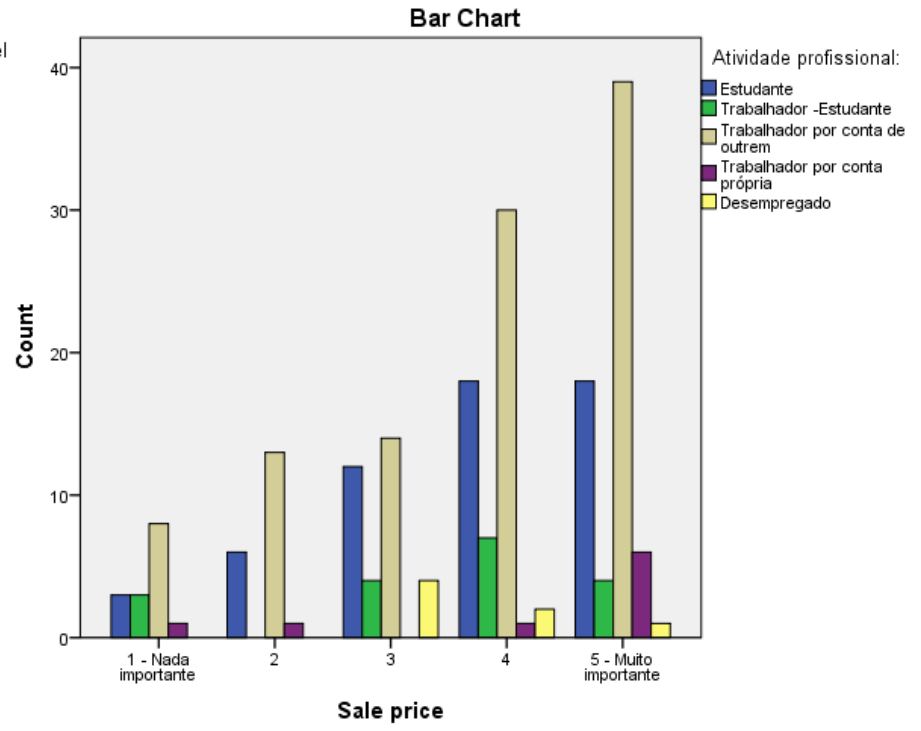
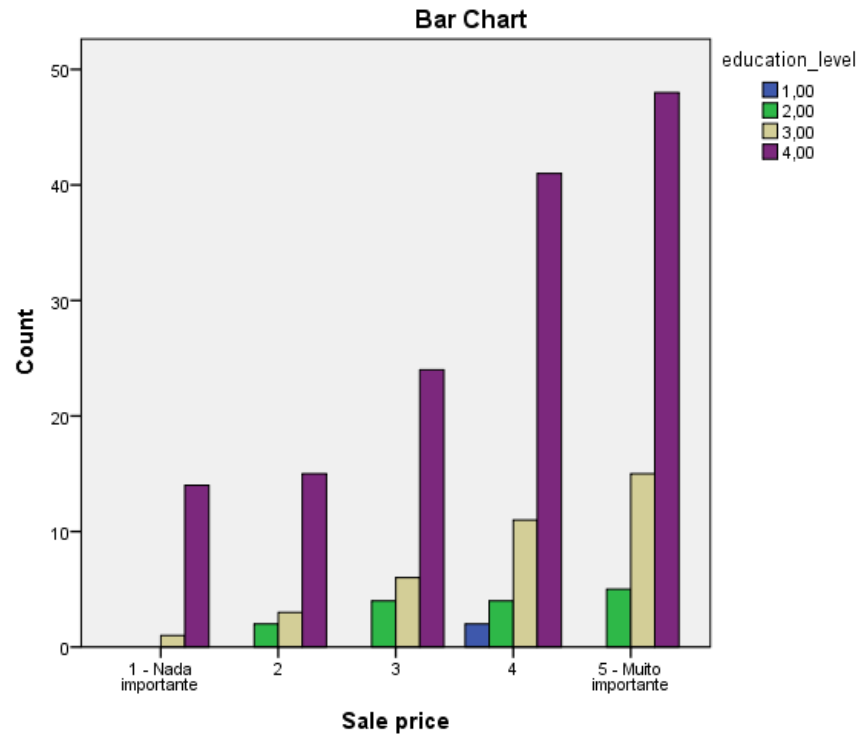
Innovation in the positioning of Nutella



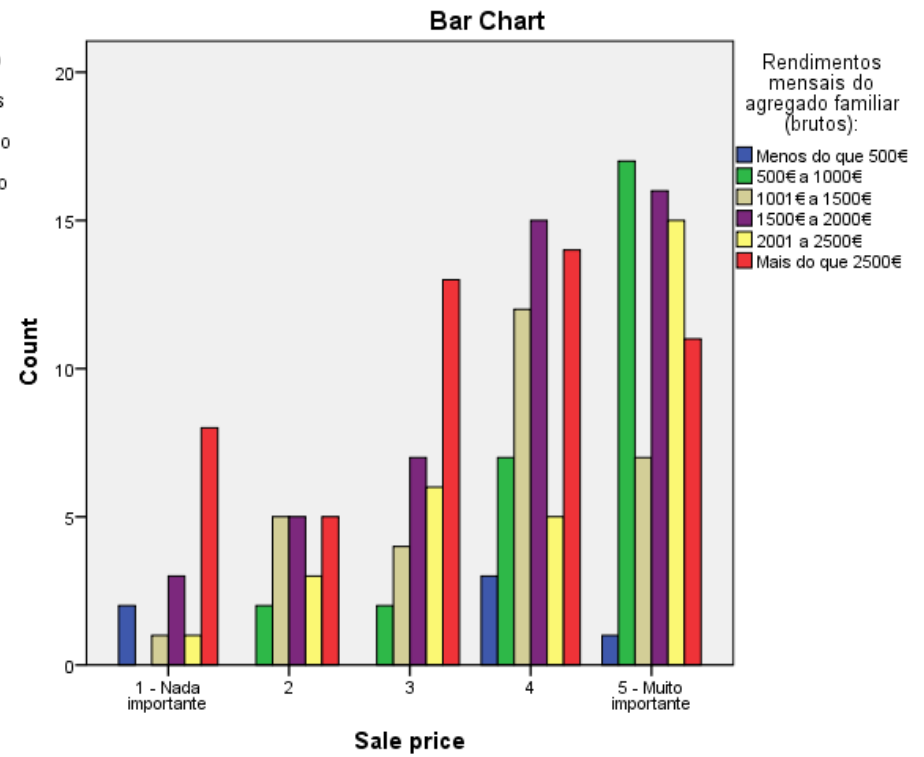
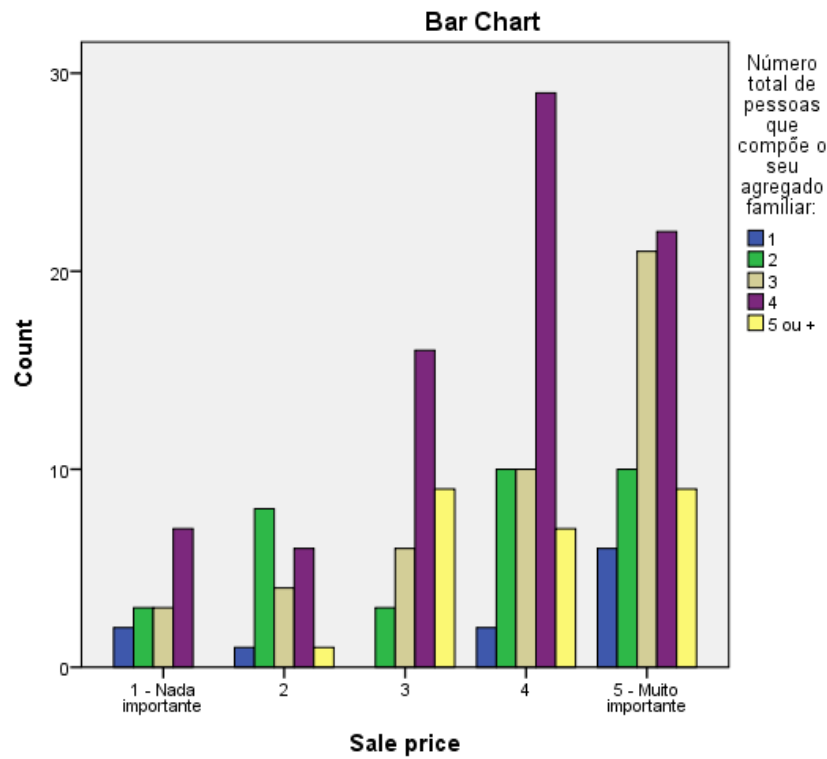
Set of graphics 4 - Influence of socio-demographic characteristics on *Sale Price* motive



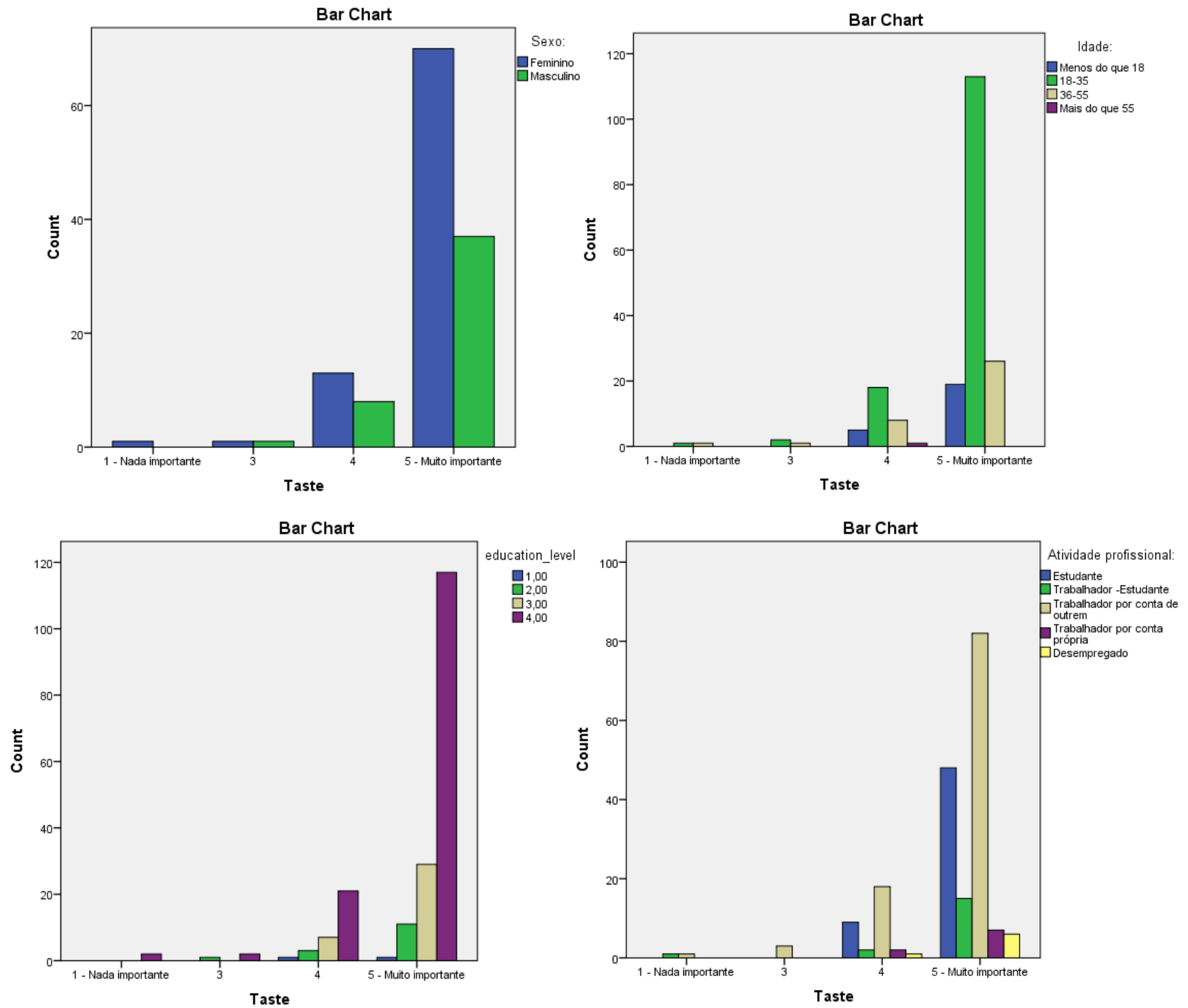
Innovation in the positioning of Nutella



1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).

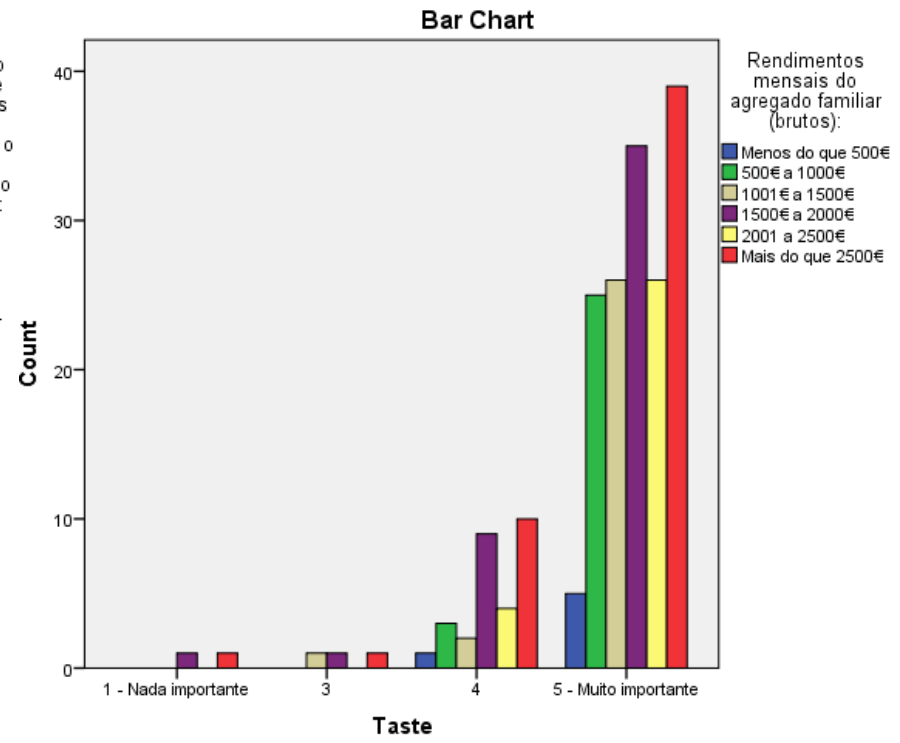
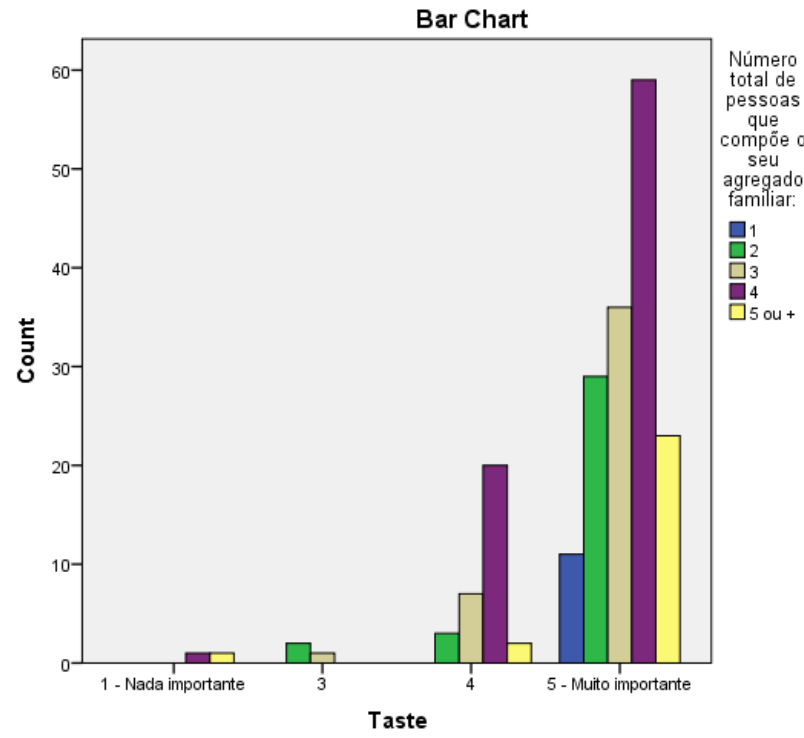


Set of graphics 5 - Influence of socio-demographic characteristics on *Taste* motive



1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).

Innovation in the positioning of Nutella



Appendix 5 - Cross tabulations and Frequencies Tables regarding Nutella consumption

Table A - Cross tabulation: Nutella consumers and Gender

			Sexo:		Total
			Feminino	Masculino	
CONSOME Nutella?	Sim	% within CONSOME Nutella?	60,5%	39,5%	100,0%
		% of Total	29,6%	19,3%	48,9%
	Não	% within CONSOME Nutella?	61,7%	38,3%	100,0%
		% of Total	31,5%	19,6%	51,1%
Total		% within CONSOME Nutella?	61,1%	38,9%	100,0%
		% of Total	61,1%	38,9%	100,0%

Table B - Cross tabulation: Nutella consumers and Age

		Idade:				Total	
		Menos do que 18	18-35	36-55	Mais do que 55		
CONSOME Nutella?	Sim	Count	34	220	40	3	297
		% within CONSOME Nutella?	11,4%	74,1%	13,5%	1,0%	100,0%
		% within Idade:	68,0%	54,1%	31,0%	14,3%	48,9%
		% of Total	5,6%	36,2%	6,6%	0,5%	48,9%
	Não	Count	16	187	89	18	310
		% within CONSOME Nutella?	5,2%	60,3%	28,7%	5,8%	100,0%
		% within Idade:	32,0%	45,9%	69,0%	85,7%	51,1%
		% of Total	2,6%	30,8%	14,7%	3,0%	51,1%
Total		Count	50	407	129	21	607
		% within CONSOME Nutella?	8,2%	67,1%	21,3%	3,5%	100,0%
		% within Idade:	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	8,2%	67,1%	21,3%	3,5%	100,0%

Table C - Cross tabulation: Nutella consumers and Education level

			CONSUME Nutella?		Total
			Sim	Não	
education_level ²⁴	1,00	Count	9	4	13
		Expected Count	6,4	6,6	13,0
		% within education_level	69,2%	30,8%	100,0%
		% within Consume Nutella?	3,0%	1,3%	2,1%
		% of Total	1,5%	0,7%	2,1%
	2,00	Count	18	13	31
		Expected Count	15,2	15,8	31,0
		% within education_level	58,1%	41,9%	100,0%
		% within Consume Nutella?	6,1%	4,2%	5,1%
		% of Total	3,0%	2,1%	5,1%
	3,00	Count	49	44	93
		Expected Count	45,5	47,5	93,0
		% within education_level	52,7%	47,3%	100,0%
		% within Consume Nutella?	16,5%	14,2%	15,3%
		% of Total	8,1%	7,2%	15,3%
	4,00	Count	221	249	470
		Expected Count	230,0	240,0	470,0
		% within education_level	47,0%	53,0%	100,0%
		% within Consume Nutella?	74,4%	80,3%	77,4%
		% of Total	36,4%	41,0%	77,4%
Total		Count	297	310	607
		Expected Count	297,0	310,0	607,0
		% within education_level	48,9%	51,1%	100,0%
		% within Consume Nutella?	100,0%	100,0%	100,0%
		% of Total	48,9%	51,1%	100,0%

²⁴ 1,00 = 1º Ciclo + 2º Ciclo (Elementary School); 2,00 = 3º Ciclo (Middle School); 3,00 = Ensino Secundário (High School); 4,00 = Ensino Superior (Higher Education).

Table D - Cross tabulation: Nutella consumers and Professional activity

			Atividade profissional:					Total	
			Estudante	Trabalhador - Estudante	Trabalhador por conta de outrem	Trabalhador por conta própria	Reformado		Desempregado
CONSOME Nutella?	Sim	Count	89	33	152	12	0	11	297
		% within CONSOME Nutella?	30,0%	11,1%	51,2%	4,0%	0,0%	3,7%	100,0%
		% within Atividade profissional:	59,7%	45,8%	45,4%	37,5%	0,0%	64,7%	48,9%
		% of Total	14,7%	5,4%	25,0%	2,0%	0,0%	1,8%	48,9%
CONSOME Nutella?	Não	Count	60	39	183	20	2	6	310
		% within CONSOME Nutella?	19,4%	12,6%	59,0%	6,5%	0,6%	1,9%	100,0%
		% within Atividade profissional:	40,3%	54,2%	54,6%	62,5%	100,0%	35,3%	51,1%
		% of Total	9,9%	6,4%	30,1%	3,3%	0,3%	1,0%	51,1%
Total		Count	149	72	335	32	2	17	607
		% within CONSOME Nutella?	24,5%	11,9%	55,2%	5,3%	0,3%	2,8%	100,0%
		% within Atividade profissional:	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	24,5%	11,9%	55,2%	5,3%	0,3%	2,8%	100,0%

Table E - Cross tabulation: Nutella consumers and Household composition

			Número total de pessoas que compõe o seu agregado familiar:					Total
			1	2	3	4	5 ou +	
CONSOME Nutella?	Sim	Count	26	51	70	110	40	297
		% within CONSOME Nutella?	8,8%	17,2%	23,6%	37,0%	13,5%	100,0%
		% within Número total de pessoas que compõe o seu agregado familiar:	38,2%	41,5%	45,5%	55,6%	62,5%	48,9%
		% of Total	4,3%	8,4%	11,5%	18,1%	6,6%	48,9%
NÃO		Count	42	72	84	88	24	310
		% within CONSOME Nutella?	13,5%	23,2%	27,1%	28,4%	7,7%	100,0%
		% within Número total de pessoas que compõe o seu agregado familiar:	61,8%	58,5%	54,5%	44,4%	37,5%	51,1%
		% of Total	6,9%	11,9%	13,8%	14,5%	4,0%	51,1%
Total		Count	68	123	154	198	64	607
		% within CONSOME Nutella?	11,2%	20,3%	25,4%	32,6%	10,5%	100,0%
		% within Número total de pessoas que compõe o seu agregado familiar:	100,0%	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	11,2%	20,3%	25,4%	32,6%	10,5%	100,0%

Table F - Cross tabulation: Nutella consumers and Monthly gross household income

			Rendimentos mensais do agregado familiar (brutos):					Total	
			Menos do que 500€	500€ a 1000€	1001€ a 1500€	1501€ a 2000€	2001 a 2500€		Mais do que 2500€
CONSOME Nutella?	Sim	Count	9	47	50	57	50	77	290
		% within Consume Nutella?	3,1%	16,2%	17,2%	19,7%	17,2%	26,6%	100,0%
		% of Total	1,5%	8,0%	8,5%	9,6%	8,5%	13,0%	49,1%
NÃO		Count	6	45	50	66	42	92	301
		% within Consume Nutella?	2,0%	15,0%	16,6%	21,9%	14,0%	30,6%	100,0%
		% of Total	1,0%	7,6%	8,5%	11,2%	7,1%	15,6%	50,9%
Total		Count	15	92	100	123	92	169	591
		% within Consume Nutella?	2,5%	15,6%	16,9%	20,8%	15,6%	28,6%	100,0%
		% of Total	2,5%	15,6%	16,9%	20,8%	15,6%	28,6%	100,0%

Table G - Chi-Square tests regarding Nutella consumers and socio-demographic characteristics

	Value	df	sig
Gender	,055 ^a	1	,815
Age	38,221 ^a	3	0
Level of education	n/a		
Professional activity	14,212 ^a	5	,014
Household composition	14,796 ^a	4	,005
Income	3,125 ^a	5	0,681

N/a: Assumptions for Chi-square test were violated, so interpretation is not valid.
Significant values are highlighted with the green color ($\rho \leq 0,05$).

Table H - Frequencies table: Nutella consumption moments

	Responses		Percent of Cases
	N	Percent	
Nutella_when ^a Pequeno-almoço	76	17,8%	25,6%
Lanche da manhã	39	9,1%	13,1%
Lanche da tarde	246	57,6%	82,8%
Noite	62	14,5%	20,9%
Refeições principais	4	0,9%	1,3%
Total	427	100,0%	143,8%

a. Dichotomy group tabulated at value 1.

Table I - Frequencies table: Nutella serving combination

	Responses		Percent of Cases
	N	Percent	
how_consume ^a No pão	211	42,5%	71,0%
Em crepes	199	40,0%	67,0%
Em bolachas	54	10,9%	18,2%
Outro	33	6,6%	11,1%
Total	497	211	42,5%

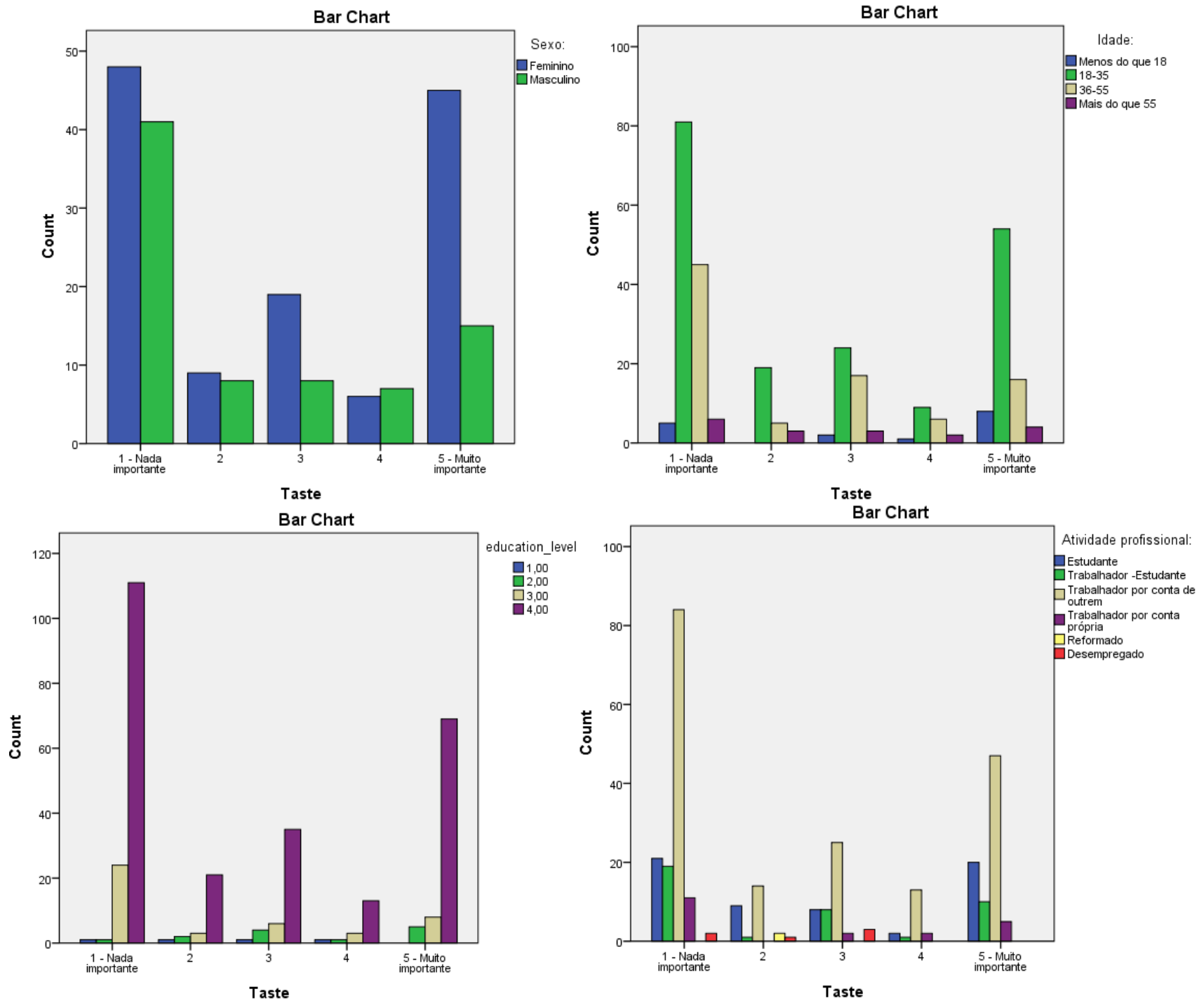
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Table J - Cross tabulation: Nutella consumption by place

			where_consume ^a					Total
			Casa	Restaurantes	Creperias	Nuts	Outro	
where_consume ^a	Casa	Count	254	9	93	34	4	254
		% of Total	85,8%	3,0%	31,4%	11,5%	1,4%	85,8%
	Restaurantes	Count	9	20	14	4	2	20
		% of Total	3,0%	6,8%	4,7%	1,4%	0,7%	6,8%
	Creperias	Count	93	14	124	28	3	124
		% of Total	31,4%	4,7%	41,9%	9,5%	1,0%	41,9%
	Nuts	Count	34	4	28	46	2	46
		% of Total	11,5%	1,4%	9,5%	15,5%	0,7%	15,5%
	Outro	Count	4	2	3	2	10	10
		% of Total	1,4%	0,7%	1,0%	0,7%	3,4%	3,4%
	Total	Count	254	20	124	46	10	296
		% of Total	85,8%	6,8%	41,9%	15,5%	3,4%	100,0%

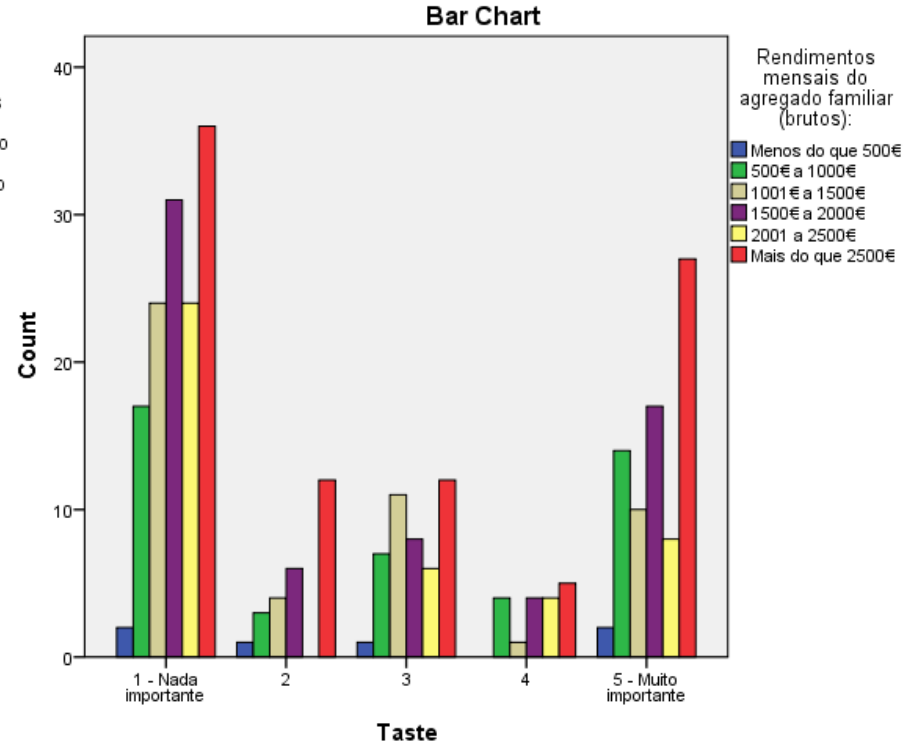
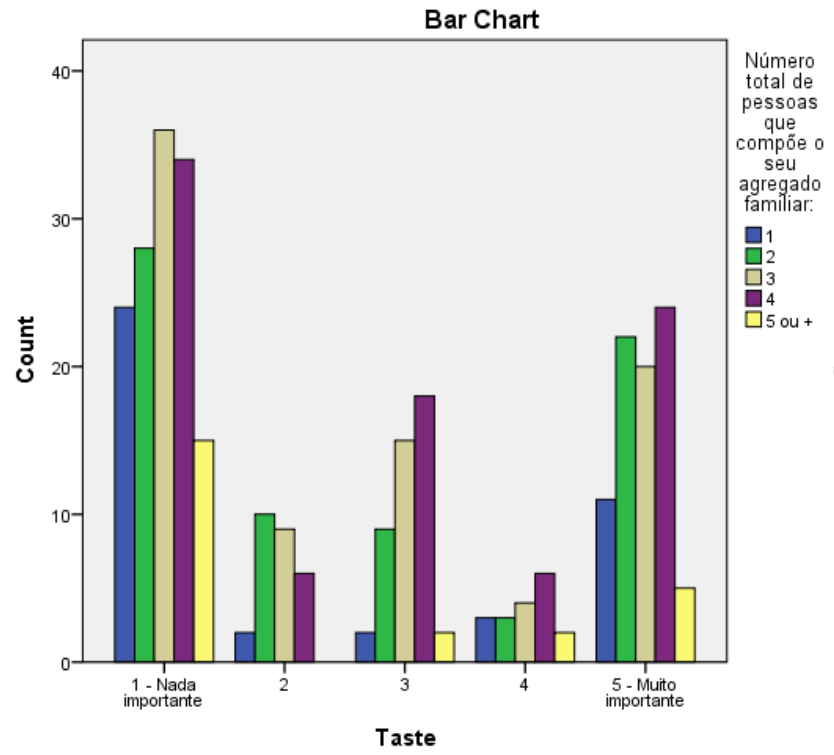
Appendix 6 - Graphics regarding the influence of socio-demographic characteristics on motives to not consume Nutella

Set of graphics 1 - Influence of socio-demographic characteristics on *Taste* motive

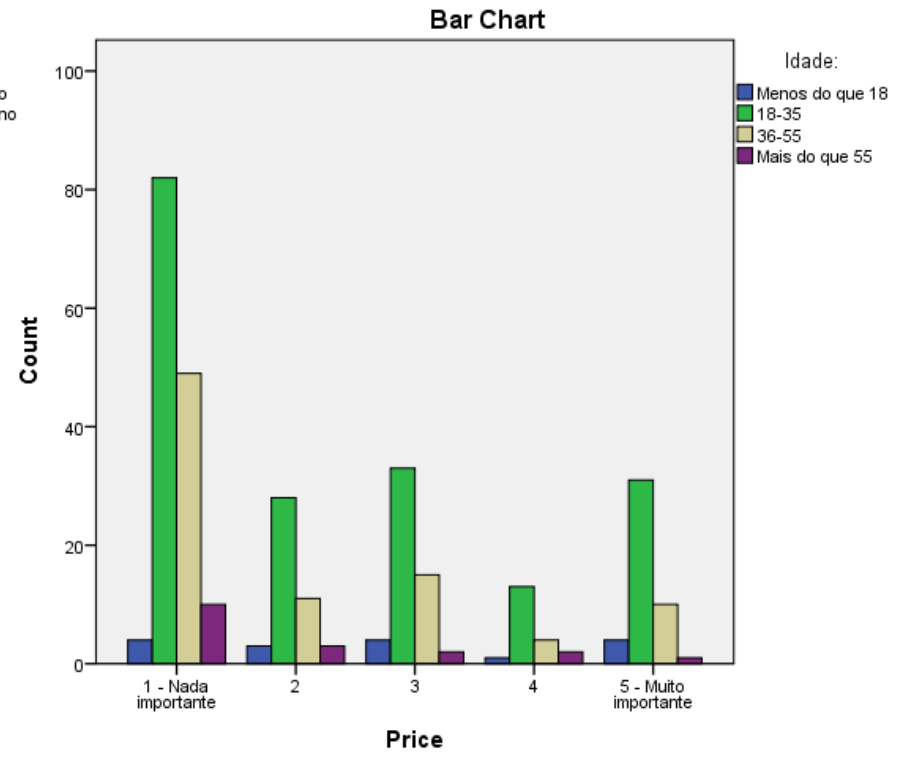
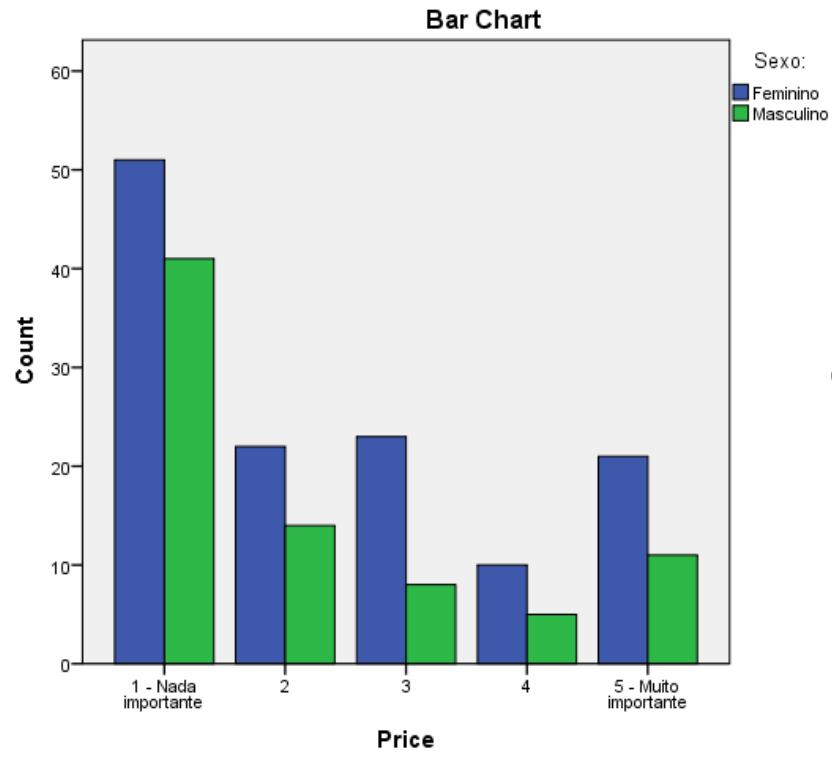


1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).

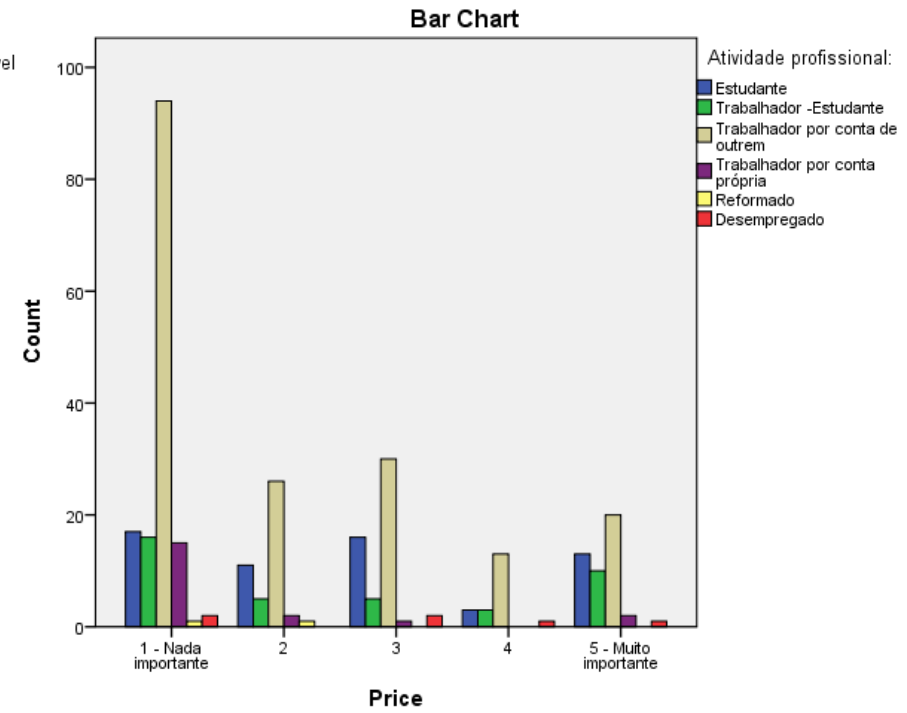
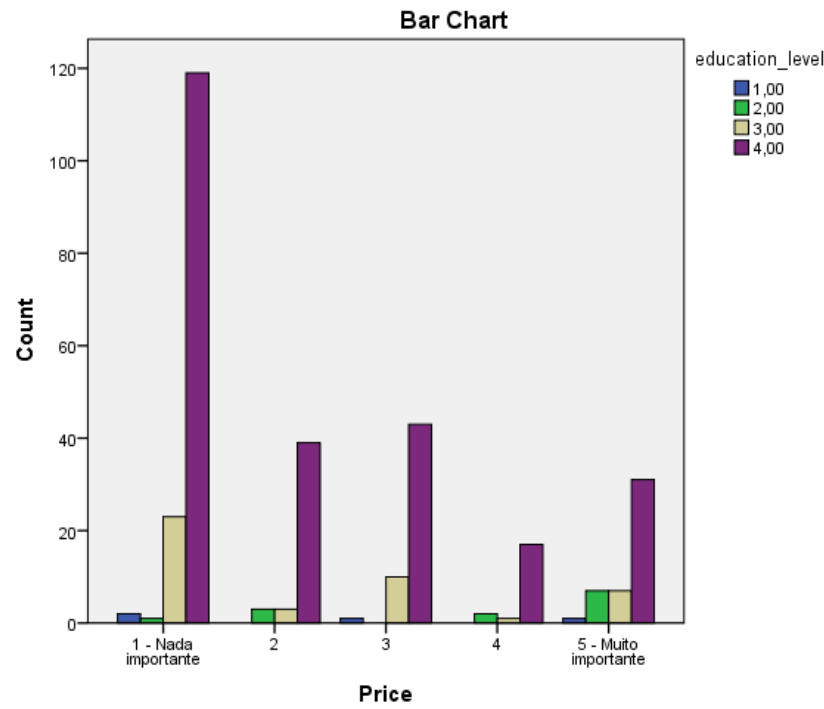
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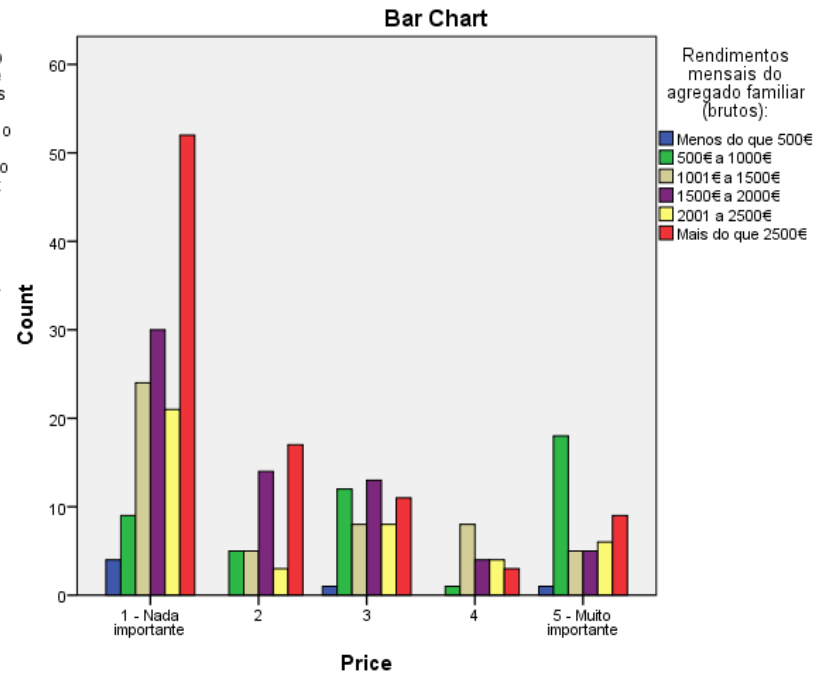
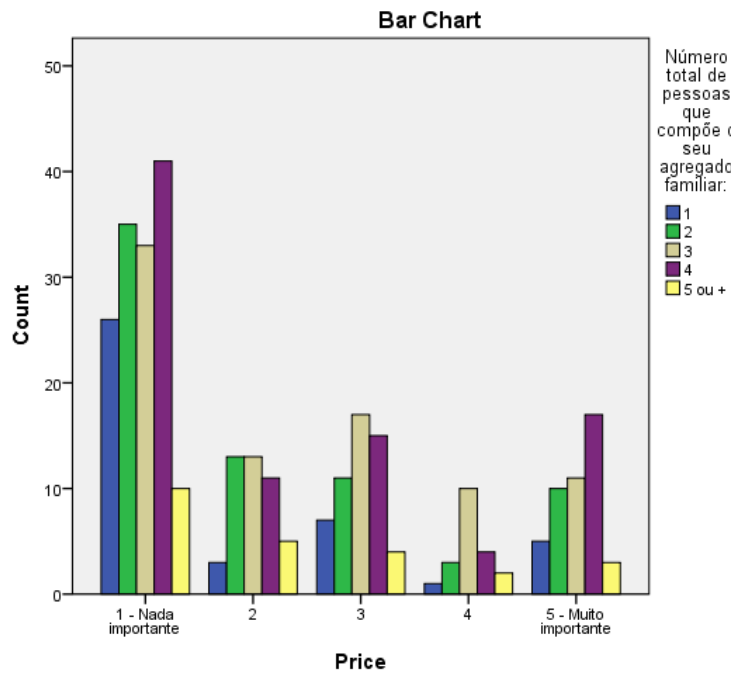
Set of graphics 2 - Influence of socio-demographic characteristics on *Price* motive



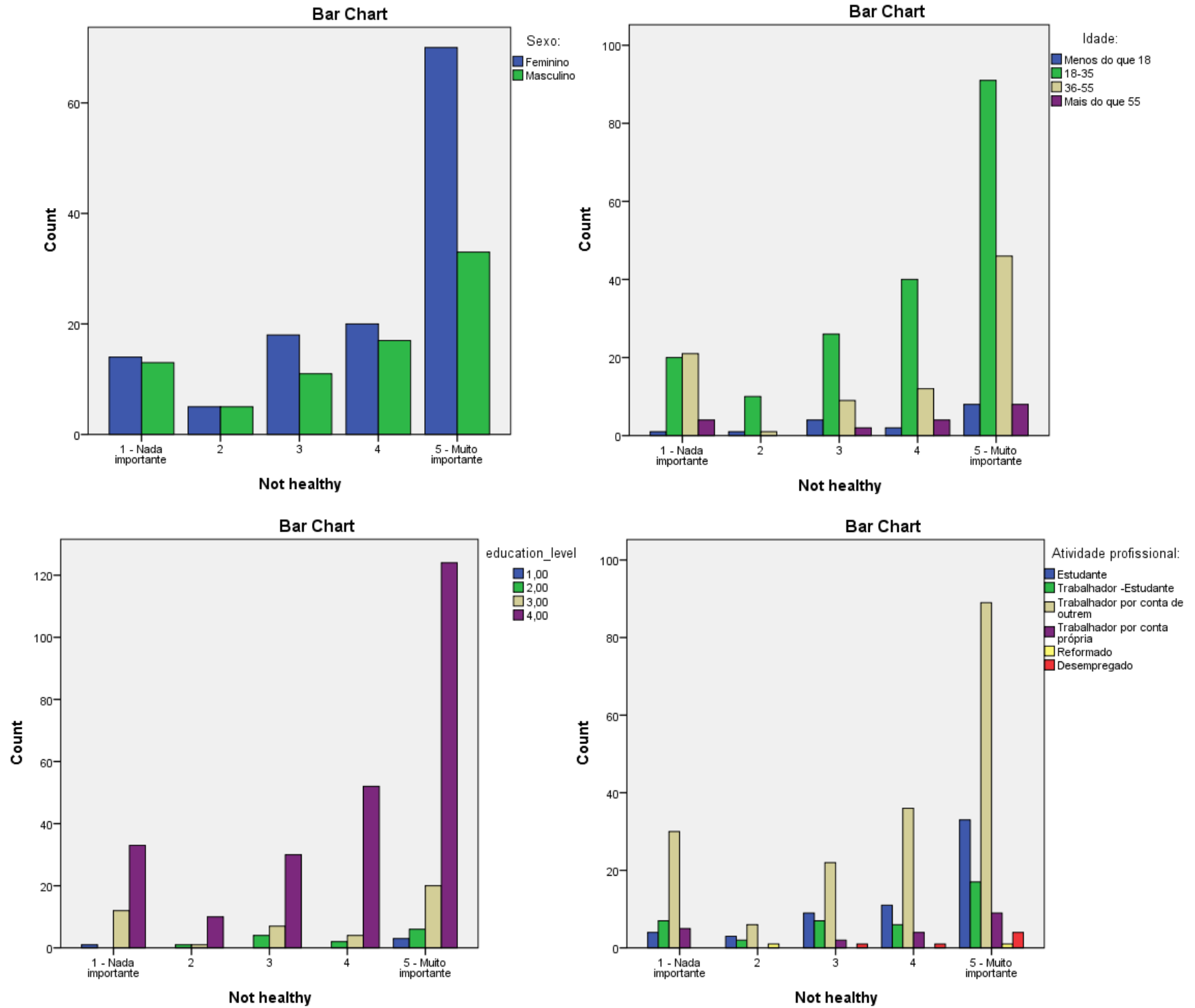
Innovation in the positioning of Nutella



1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).

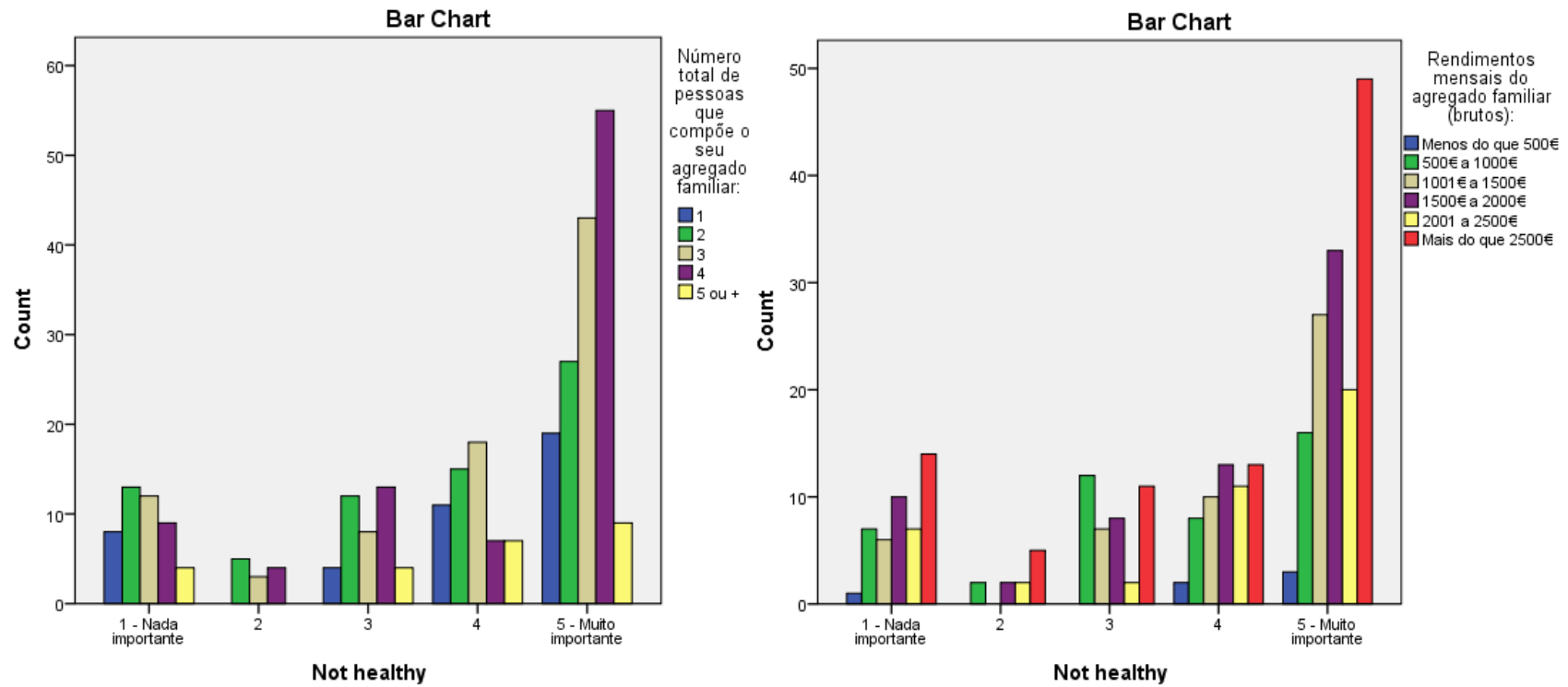


Set of graphics 3 - Influence of socio-demographic characteristics on *Not healthy* motive

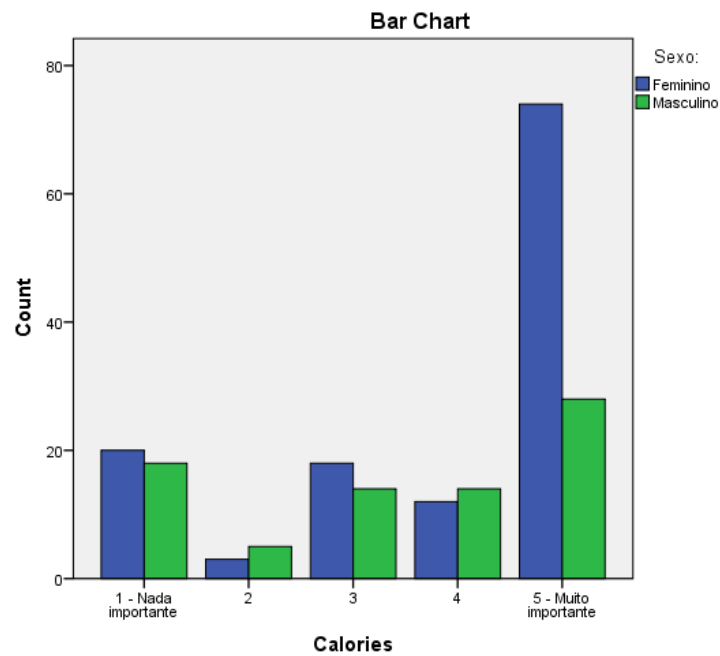


1,00 = 1° Ciclo + 2° Ciclo (Elementary School);
 2,00 = 3° Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).

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Set of graphics 4 - Influence of socio-demographic characteristics on *Calories* motive



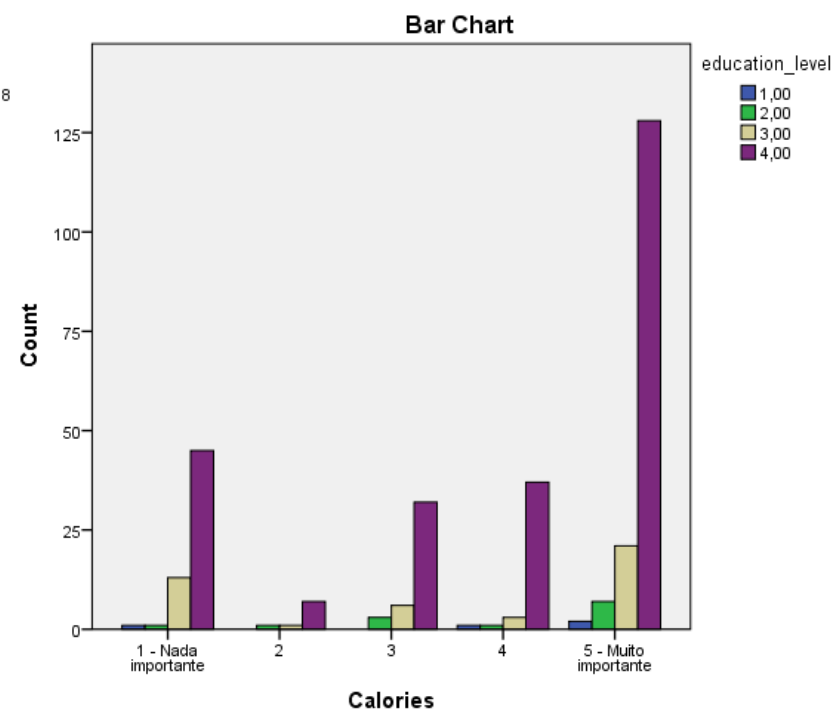
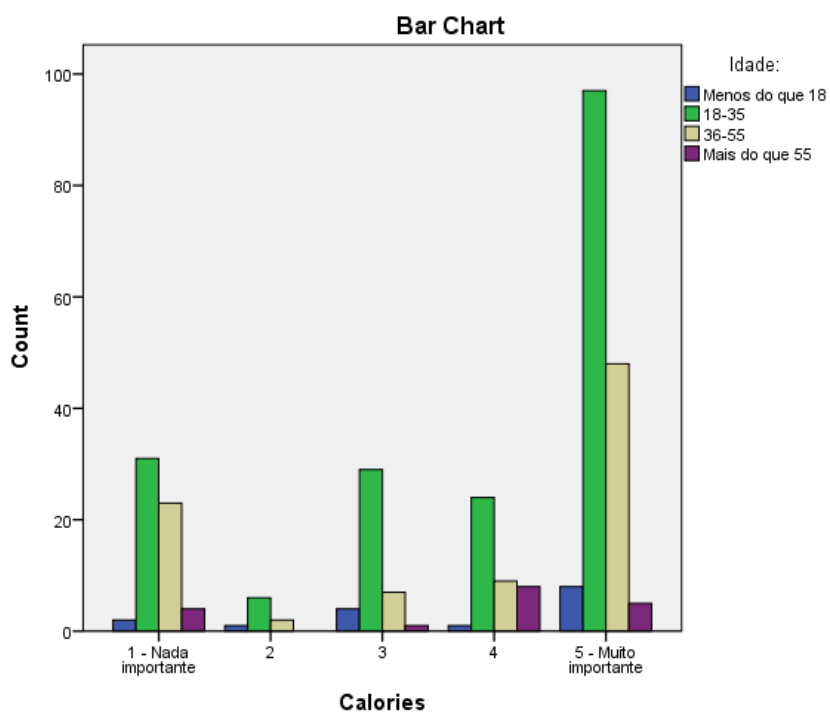
Chi-Square Tests – Calories and Gender

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	11,441 ^a	4	,022
Likelihood Ratio	11,491	4	,022
Linear-by-Linear Association	6,251	1	,012
N of Valid Cases	206		

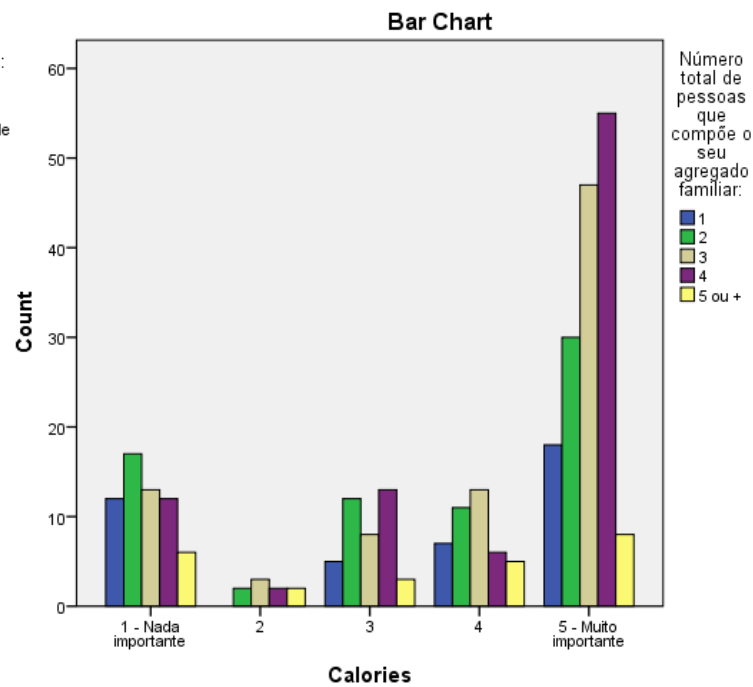
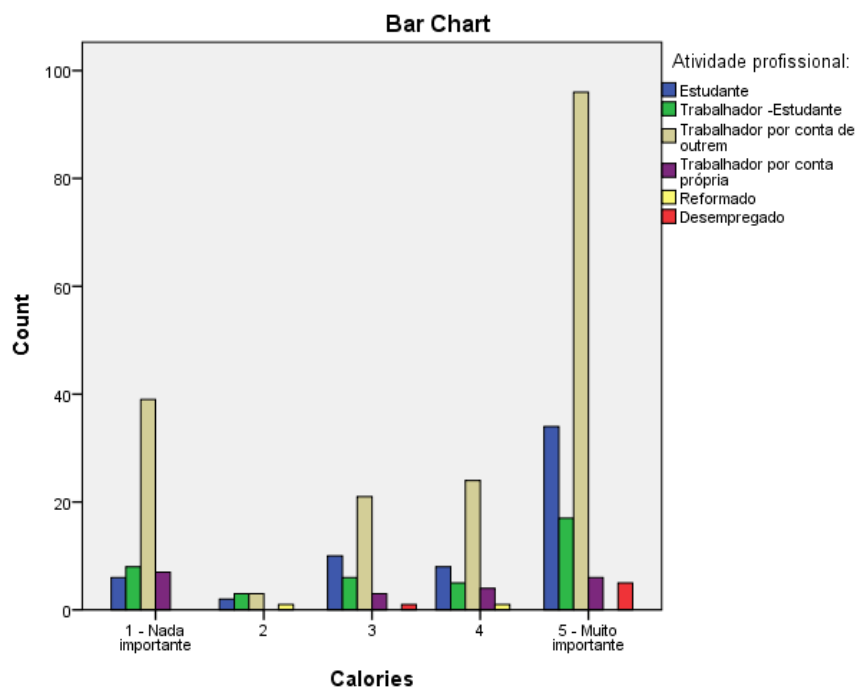
a. 2 cells (20,0%) have expected count less than 5. The minimum expected count is 3,07.

Significant values are highlighted with the green color ($p \leq 0,05$).

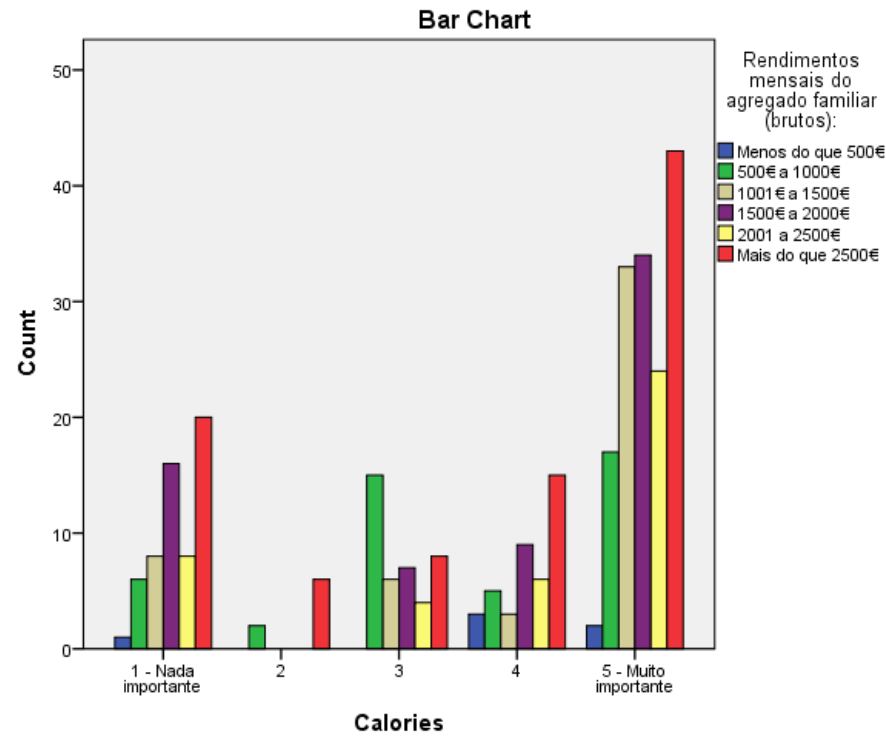
Innovation in the positioning of Nutella



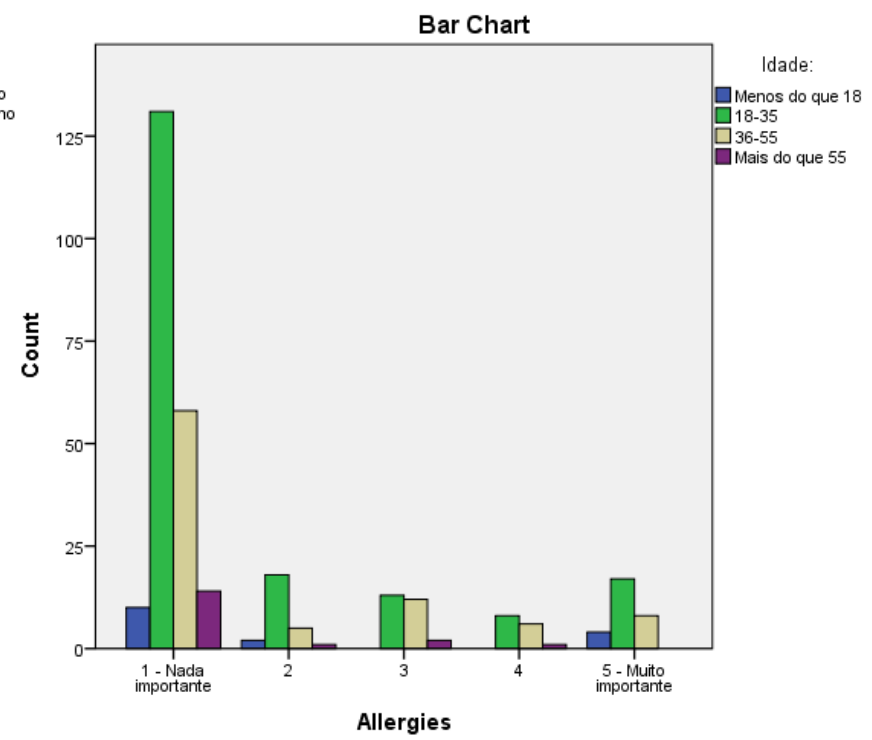
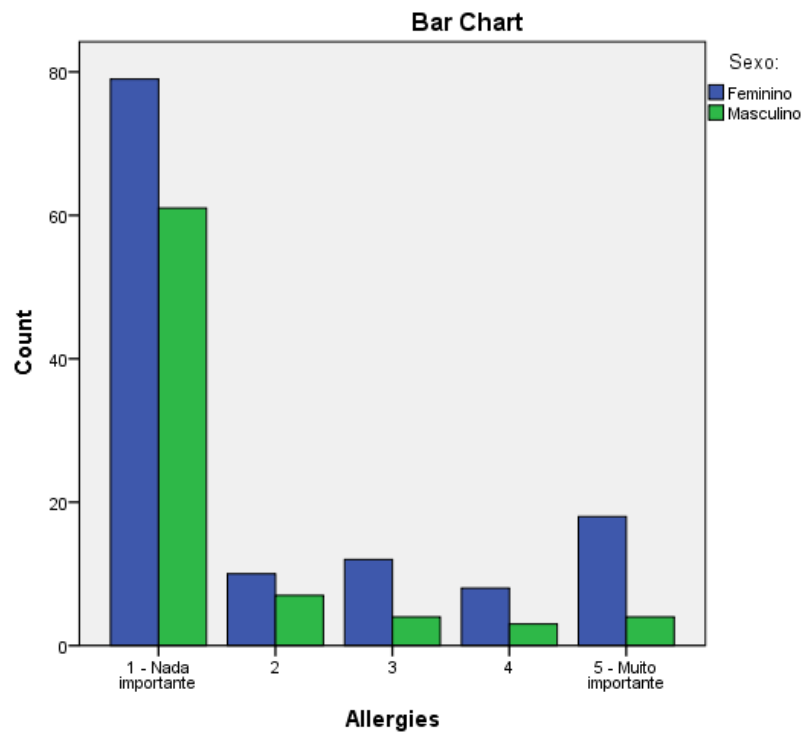
1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).



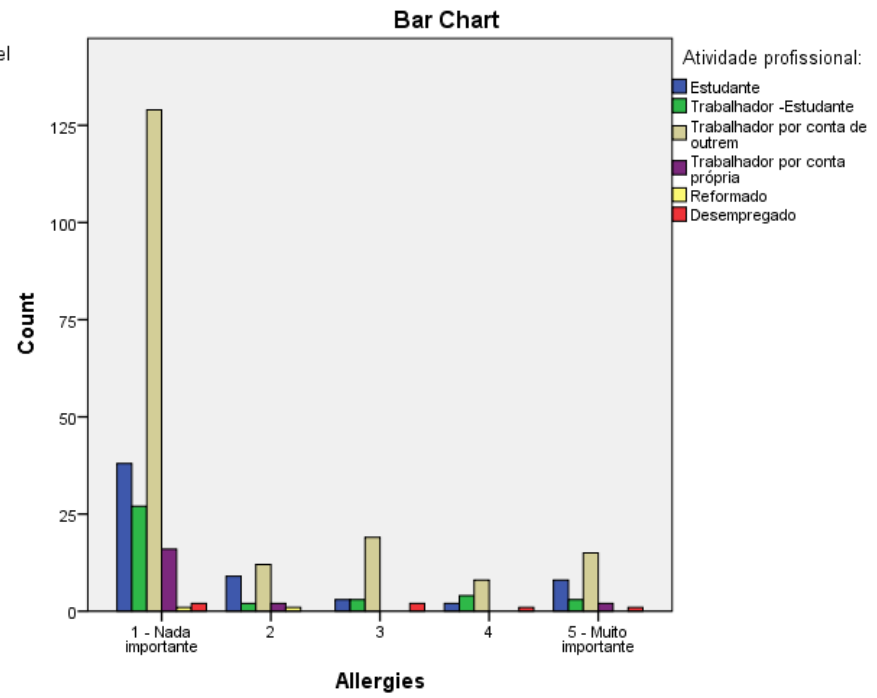
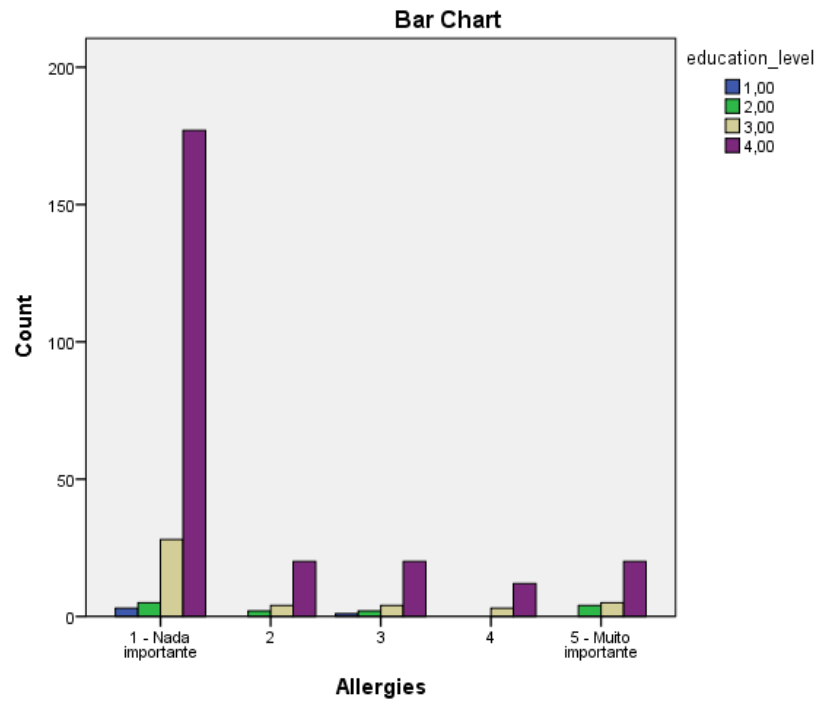
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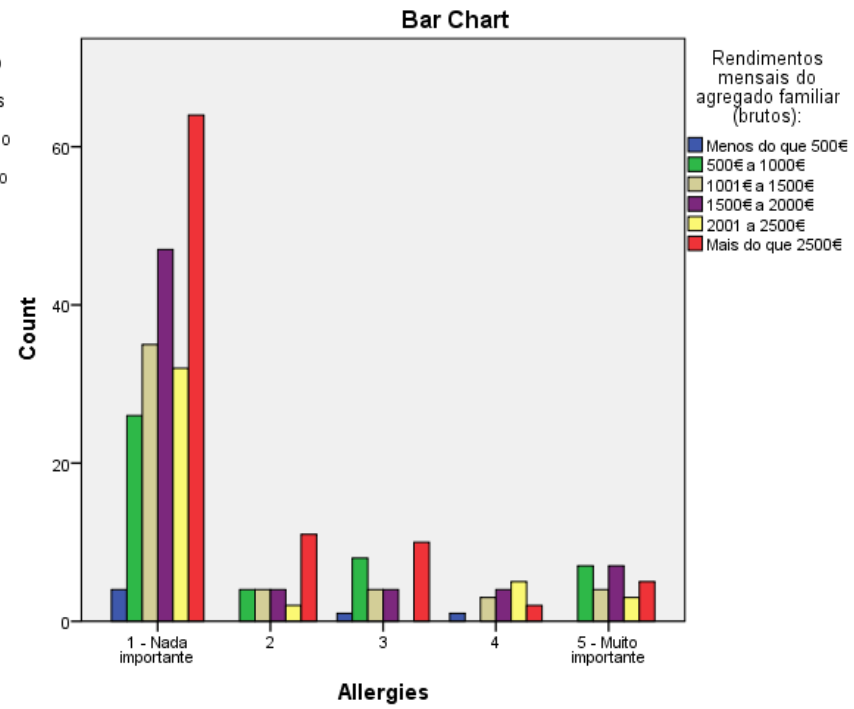
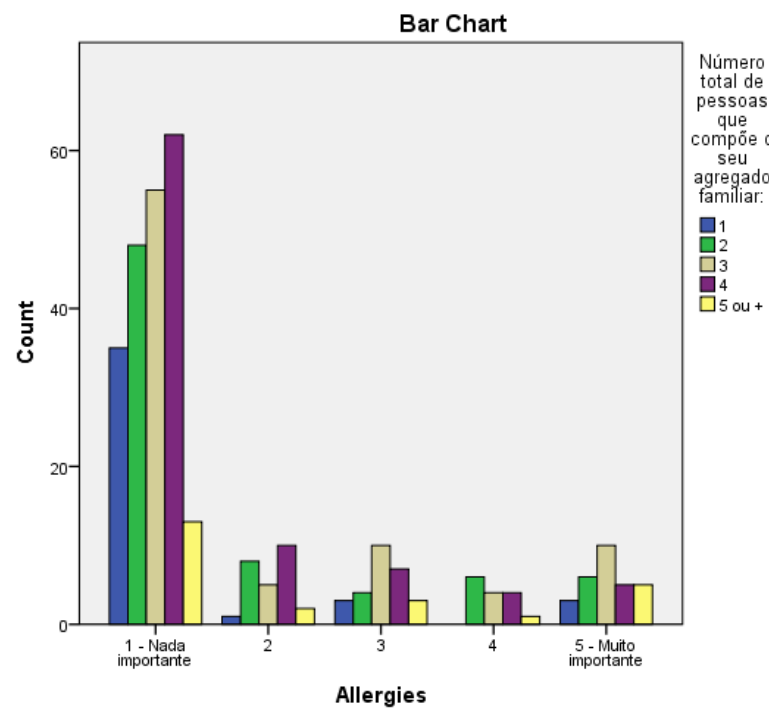
Set of graphics 5 - Influence of socio-demographic characteristics on *Allergies* motive



Innovation in the positioning of Nutella



1,00 = 1º Ciclo + 2º Ciclo (Elementary School);
 2,00 = 3º Ciclo (Middle School);
 3,00 = Ensino Secundário (High School);
 4,00 = Ensino Superior (Higher Education).



Appendix 7 - Cross tabulations and Frequencies Tables regarding Nutella consumption at breakfast

Table A - Frequencies table: Breakfast consumption by place

		Responses		Percent of Cases
		N	Percent	
where_breakfast ^a	Casa	512	86,2%	91,8%
	Café / Pastelaria	60	10,1%	10,8%
	Outro	22	3,7%	3,9%
Total		594	100,0%	106,5%

a. Dichotomy group tabulated at value 1.

Table B - Cross tabulation: Breakfast consumption in family and Breakfast companion

			Com que frequência toma o pequeno-almoço em família?				Total
			Diariamente	Aos fins de semana	Raramente	Nunca	
with_who_breakfast ^a	Sozinho	Count	50	151	135	54	390
		% within \$with_who_breakfast	12,8%	38,7%	34,6%	13,8%	
		% of Total	9,0%	27,1%	24,2%	9,7%	69,9%
Em família		Count	156	52	10	0	218
		% within \$with_who_breakfast	71,6%	23,9%	4,6%	0,0%	
		% of Total	28,0%	9,3%	1,8%	0,0%	39,1%
Com colegas / amigos		Count	8	29	11	7	55
		% within \$with_who_breakfast	14,5%	52,7%	20,0%	12,7%	
		% of Total	1,4%	5,2%	2,0%	1,3%	9,9%
Outro		Count	0	1	5	1	7
		% within \$with_who_breakfast	0,0%	14,3%	71,4%	14,3%	
		% of Total	0,0%	0,2%	0,9%	0,2%	1,3%
Total		Count	180	181	139	58	558
		% of Total	32,3%	32,4%	24,9%	10,4%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Innovation in the positioning of Nutella

Table C - Cross tabulation: Frequency of breakfast consumption in family and Age

			Idade:				Total
			Menos do que 18	18-35	36-55	Mais do que 55	
Com que frequência toma o pequeno-almoço em família?	Diariamente	Count	28	89	58	5	180
		% within Com que frequência toma o pequeno-almoço em família?	15,6%	49,4%	32,2%	2,8%	100,0%
		% within Idade:	62,2%	24,3%	45,7%	25,0%	32,3%
		% of Total	5,0%	15,9%	10,4%	0,9%	32,3%
	Só aos fins de semana	Count	8	124	44	5	181
		% within Com que frequência toma o pequeno-almoço em família?	4,4%	68,5%	24,3%	2,8%	100,0%
		% within Idade:	17,8%	33,9%	34,6%	25,0%	32,4%
		% of Total	1,4%	22,2%	7,9%	0,9%	32,4%
	Raramente	Count	7	106	18	8	139
		% within Com que frequência toma o pequeno-almoço em família?	5,0%	76,3%	12,9%	5,8%	100,0%
		% within Idade:	15,6%	29,0%	14,2%	40,0%	24,9%
		% of Total	1,3%	19,0%	3,2%	1,4%	24,9%
Nunca	Count	2	47	7	2	58	
	% within Com que frequência toma o pequeno-almoço em família?	3,4%	81,0%	12,1%	3,4%	100,0%	
	% within Idade:	4,4%	12,8%	5,5%	10,0%	10,4%	
	% of Total	0,4%	8,4%	1,3%	0,4%	10,4%	
Total	Count	45	366	127	20	558	
	% within Com que frequência toma o pequeno-almoço em família?	8,1%	65,6%	22,8%	3,6%	100,0%	
	% within Idade:	100,0%	100,0%	100,0%	100,0%	100,0%	
	% of Total	8,1%	65,6%	22,8%	3,6%	100,0%	

Innovation in the positioning of Nutella

Table D - Cross tabulation: Breakfast consumption options

			opcoes_peqAlm ^a											Total	
			Leite com cereais	Leite com chocolate	Leite simples	Café	Sumo	Iogurte	Batido	Fruta	Pão	Torrada	Bolo		Outro
opcoes_peqAlm ^a	Leite com cereais	Count % of Total	224 40,1%	44 7,9%	38 6,8%	72 12,9%	39 7,0%	89 15,9%	15 2,7%	47 8,4%	93 16,7%	108 19,4%	20 3,6%	10 1,8%	224 40,1%
	Leite com chocolate	Count % of Total	44 7,9%	84 15,1%	15 2,7%	25 4,5%	20 3,6%	29 5,2%	3 ,5%	14 2,5%	54 9,7%	48 8,6%	12 2,2%	2 ,4%	84 15,1%
	Leite simples	Count % of Total	38 6,8%	15 2,7%	98 17,6%	57 10,2%	22 3,9%	36 6,5%	5 ,9%	23 4,1%	66 11,8%	62 11,1%	13 2,3%	4 ,7%	98 17,6%
	Café	Count % of Total	72 12,9%	25 4,5%	57 10,2%	223 40,0%	49 8,8%	83 14,9%	16 2,9%	63 11,3%	126 22,6%	124 22,2%	19 3,4%	17 3,0%	223 40,0%
	Sumo	Count % of Total	39 7,0%	20 3,6%	22 3,9%	49 8,8%	105 18,8%	52 9,3%	14 2,5%	46 8,2%	73 13,1%	68 12,2%	15 2,7%	5 ,9%	105 18,8%
	Iogurte	Count % of Total	89 15,9%	29 5,2%	36 6,5%	83 14,9%	52 9,3%	207 37,1%	22 3,9%	86 15,4%	110 19,7%	112 20,1%	18 3,2%	15 2,7%	207 37,1%
	Batido	Count % of Total	15 2,7%	3 ,5%	5 ,9%	16 2,9%	14 2,5%	22 3,9%	38 6,8%	19 3,4%	18 3,2%	24 4,3%	4 ,7%	4 ,7%	38 6,8%
	Fruta	Count % of Total	47 8,4%	14 2,5%	23 4,1%	63 11,3%	46 8,2%	86 15,4%	19 3,4%	145 26,0%	73 13,1%	67 12,0%	11 2,0%	15 2,7%	145 26,0%
	Pão	Count % of Total	93 16,7%	54 9,7%	66 11,8%	126 22,6%	73 13,1%	110 19,7%	18 3,2%	73 13,1%	276 49,5%	125 22,4%	26 4,7%	24 4,3%	276 49,5%
	Torrada	Count % of Total	108 19,4%	48 8,6%	62 11,1%	124 22,2%	68 12,2%	112 20,1%	24 4,3%	67 12,0%	125 22,4%	255 45,7%	22 3,9%	25 4,5%	255 45,7%
	Bolo	Count % of Total	20 3,6%	12 2,2%	13 2,3%	19 3,4%	15 2,7%	18 3,2%	4 ,7%	11 2,0%	26 4,7%	22 3,9%	39 7,0%	3 ,5%	39 7,0%
	Outro	Count % of Total	10 1,8%	2 ,4%	4 ,7%	17 3,0%	5 ,9%	15 2,7%	4 ,7%	15 2,7%	24 4,3%	25 4,5%	3 ,5%	59 10,6%	59 10,6%
Total	Count % of Total	224 40,1%	84 15,1%	98 17,6%	223 40,0%	105 18,8%	207 37,1%	38 6,8%	145 26,0%	276 49,5%	255 45,7%	39 7,0%	59 10,6%	558 100,0%	

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Innovation in the positioning of Nutella

Table E - Cross tabulation: Plain bread combinations

		barrar_pao1 ^a										
		Fiambre	Queijo	Manteiga / Margarina	Nutella	Tulicreme	Outro creme de chocolate	Doce / Marmelada	Creme de queijo	Other	Total	
barrar_pao ^a	Fiambre	Count	146	102	83	23	5	2	28	31	6	146
		% of Total	52,90%	37,00%	30,10%	8,30%	1,80%	0,70%	10,10%	11,20%	2,20%	52,90%
	Queijo	Count	102	151	86	26	5	1	30	34	7	151
		% of Total	37,00%	54,70%	31,20%	9,40%	1,80%	0,40%	10,90%	12,30%	2,50%	54,70%
	Manteiga / Margarina	Count	83	86	182	27	6	1	36	23	4	182
		% of Total	30,10%	31,20%	65,90%	9,80%	2,20%	0,40%	13,00%	8,30%	1,40%	65,90%
	Nutella	Count	23	26	27	42	4	1	17	11	3	42
		% of Total	8,30%	9,40%	9,80%	15,20%	1,40%	0,40%	6,20%	4,00%	1,10%	15,20%
	Tulicreme	Count	5	5	6	4	7	0	3	0	0	7
		% of Total	1,80%	1,80%	2,20%	1,40%	2,50%	0,00%	1,10%	0,00%	0,00%	2,50%
Outro creme de chocolate	Count	2	1	1	1	0	3	0	0	0	3	
	% of Total	0,70%	0,40%	0,40%	0,40%	0,00%	1,10%	0,00%	0,00%	0,00%	1,10%	
Doce / Marmelada	Count	28	30	36	17	3	0	53	15	3	53	
	% of Total	10,10%	10,90%	13,00%	6,20%	1,10%	0,00%	19,20%	5,40%	1,10%	19,20%	
Creme de queijo	Count	31	34	23	11	0	0	15	48	4	48	
	% of Total	11,20%	12,30%	8,30%	4,00%	0,00%	0,00%	5,40%	17,40%	1,40%	17,40%	
Other	Count	6	7	4	3	0	0	3	4	19	19	
	% of Total	2,20%	2,50%	1,40%	1,10%	0,00%	0,00%	1,10%	1,40%	6,90%	6,90%	
Total	Count	146	151	182	42	7	3	53	48	19	276	
	% of Total	52,90%	54,70%	65,90%	15,20%	2,50%	1,10%	19,20%	17,40%	6,90%	100,00%	

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Table F - Frequencies table: Toast combinations

		Responses		Percent of Cases
		N	Percent	
conduto_toast ^a	Ham	47	10,3%	18,4%
	Cheese	50	11,0%	19,6%
	Butter	232	50,9%	91,0%
	Nutella	19	4,2%	7,5%
	Tulicreme	4	0,9%	1,6%
	Other chocolate spread	2	0,4%	0,8%
	Sweet / Jam	48	10,5%	18,8%
	Cheese cream	42	9,2%	16,5%
	Other	12	2,6%	4,7%
Total	456	100,0%	178,8%	

a. Dichotomy group tabulated at value 1.

Table G - Frequencies table: Nutella serving combination at breakfast

	Responses		Percent of Cases
	N	Percent	
how_breakfast ^a No pão	68	70,1%	89,5%
Em crepes	16	16,5%	21,1%
Em bolachas	8	8,2%	10,5%
Outro	5	5,2%	6,6%
Total	97	100,0%	127,6%

a. Dichotomy group tabulated at value 1.

Table H - Cross tabulation: Frequency of Nutella consumption at breakfast and Gender

			Sexo:		Total
			Feminino	Masculino	
Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	Diariamente	% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO? % of Total	40,0%	60,0%	100,0%
	Três vezes por semana	% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO? % of Total	3,8%	5,7%	9,4%
Ao fim de semana	1 vez por mês	% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO? % of Total	60,0%	40,0%	100,0%
	Raramente	% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO? % of Total	5,7%	3,8%	9,4%
Total		% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO? % of Total	50,0%	50,0%	100,0%
			62,5%	37,5%	100,0%
			9,4%	5,7%	15,1%
			56,0%	44,0%	100,0%
			26,4%	20,8%	47,2%
			54,7%	45,3%	100,0%
			54,7%	45,3%	100,0%

Table I - Cross tabulation: Frequency of Nutella consumption at breakfast and Age

			Idade:				Total
			Menos do que 18	18-35	36-55	Mais do que 55	
Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	Diariamente	Count	3	2	2	0	7
		% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	42,9%	28,6%	28,6%	0,0%	100,0%
		% within Idade:	27,3%	3,7%	20,0%	0,0%	9,2%
		% of Total	3,9%	2,6%	2,6%	0,0%	9,2%
Três vezes por semana		Count	0	3	2	1	6
		% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	0,0%	50,0%	33,3%	16,7%	100,0%
		% within Idade:	0,0%	5,6%	20,0%	100,0%	7,9%
		% of Total	0,0%	3,9%	2,6%	1,3%	7,9%
Ao fim de semana		Count	4	8	2	0	14
		% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	28,6%	57,1%	14,3%	0,0%	100,0%
		% within Idade:	36,4%	14,8%	20,0%	0,0%	18,4%
		% of Total	5,3%	10,5%	2,6%	0,0%	18,4%
1 vez por mês		Count	0	14	1	0	15
		% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	0,0%	93,3%	6,7%	0,0%	100,0%
		% within Idade:	0,0%	25,9%	10,0%	0,0%	19,7%
		% of Total	0,0%	18,4%	1,3%	0,0%	19,7%
Raramente		Count	4	27	3	0	34
		% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	11,8%	79,4%	8,8%	0,0%	100,0%
		% within Idade:	36,4%	50,0%	30,0%	0,0%	44,7%
		% of Total	5,3%	35,5%	3,9%	0,0%	44,7%
Total		Count	11	54	10	1	76
		% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	14,5%	71,1%	13,2%	1,3%	100,0%
		% within Idade:	100,0%	100,0%	100,0%	100,0%	100,0%
		% of Total	14,5%	71,1%	13,2%	1,3%	100,0%

Table J - Cross tabulation: Breakfast in family and Daily Nutella consumption at breakfast

			Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?					Total
			Diariamente	Três vezes por semana	Ao fim de semana	1 vez por mês	Raramente	
Com que frequência toma o pequeno-almoço em família?	Diariamente	Count	3	5	5	4	16	33
		% within Com que frequência toma o pequeno-almoço em família?	9,1%	15,2%	15,2%	12,1%	48,5%	100,0%
		% within Com que frequência costuma CONSUMIR Nutella ao PEQUENO-ALMOÇO?	42,9%	83,3%	35,7%	26,7%	48,5%	44,0%
		% of Total	4,0%	6,7%	6,7%	5,3%	21,3%	44,0%

Table K - Cross tabulation: Spreads chosen to combine with bread at breakfast and Age

			Idade:				Total
			Menos do que 18	18-35	36-55	Mais do que 55	
spreads_bread ^a	Fiambre	% within \$spreads_bread	10,3%	68,5%	19,2%	2,1%	52,9%
		% of Total	5,4%	36,2%	10,1%	1,1%	
	Queijo	% within \$spreads_bread	6,0%	67,5%	24,5%	2,0%	54,7%
		% of Total	3,3%	37,0%	13,4%	1,1%	
	Manteiga / Margarina	% within \$spreads_bread	8,8%	61,0%	28,6%	1,6%	65,9%
		% of Total	5,8%	40,2%	18,8%	1,1%	
	Nutella	% within \$spreads_bread	14,3%	69,0%	14,3%	2,4%	15,2%
		% of Total	2,2%	10,5%	2,2%	0,4%	
	Tulicreme	% within \$spreads_bread	42,9%	42,9%	14,3%	0,0%	2,5%
		% of Total	1,1%	1,1%	0,4%	0,0%	
	Outro creme de chocolate	% within \$spreads_bread	0,0%	66,7%	33,3%	0,0%	1,1%
		% of Total	0,0%	0,7%	0,4%	0,0%	
	Doce/ Marmelada	% within \$spreads_bread	7,5%	62,3%	28,3%	1,9%	19,2%
		% of Total	1,4%	12,0%	5,4%	0,4%	
	Creme de queijo	% within \$spreads_bread	2,1%	75,0%	22,9%	0,0%	17,4%
		% of Total	0,4%	13,0%	4,0%	0,0%	
	Outro	% within \$spreads_bread	0,0%	68,4%	31,6%	0,0%	6,9%
		% of Total	0,0%	4,7%	2,2%	0,0%	
Total	Count		19	183	68	6	276
	% of Total		6,9%	66,3%	24,6%	2,2%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.

Table L - Cross tabulation: Spreads chosen to combine with bread at breakfast and Gender

			Sexo:		Total
			Feminino	Masculino	
spreads_bread ^a	Fiambre	% within \$spreads_bread	53,3%	46,7%	58,3%
		% of Total	31,1%	27,2%	
	Queijo	% within \$spreads_bread	53,5%	46,5%	56,1%
		% of Total	30,0%	26,1%	
	Manteiga / Margarina	% within \$spreads_bread	56,3%	43,7%	66,1%
		% of Total	37,2%	28,9%	
	Nutella	% within \$spreads_bread	57,6%	42,4%	18,3%
		% of Total	10,6%	7,8%	
	Tulicreme	% within \$spreads_bread	42,9%	57,1%	3,9%
		% of Total	1,7%	2,2%	
	Outro creme de chocolate	% within \$spreads_bread	66,7%	33,3%	3
		% of Total	1,1%	0,6%	
	Doce/ Marmelada	% within \$spreads_bread	48,6%	51,4%	37
		% of Total	10,0%	10,6%	
	Creme de queijo	% within \$spreads_bread	80,6%	19,4%	36
		% of Total	16,1%	3,9%	
	Outro	% within \$spreads_bread	66,7%	33,3%	5,0%
		% of Total	3,3%	1,7%	
Total		% of Total	58,9%	41,1%	100,0%

Percentages and totals are based on respondents.

a. Dichotomy group tabulated at value 1.