Analysis of Portuguese chocolate consumers and their perceptions of the artisanal trend

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Dissertation written under the supervision of Miguel Fontes Rita

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Dedicated to my parents,
Laura and Manuel

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Abstract

Title: Analysis of Portuguese chocolate consumers and their perceptions of the artisanal trend

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The goal of this thesis is to provide a perspective of the recent artisanal trend of artisanal chocolate in Portugal. It specifically aims to analyze who the Portuguese consumers are and understand the differences between those who choose artisanal chocolate and those who choose not to.

In this study, an overview of the chocolate market was performed, with a particular emphasis on Portuguese artisanal brands. The methodology consisted of a qualitative and quantitative study. The former used in-depth interviews with chocolate consumers and artisanal producers. The latter was supported by a questionnaire distributed to 130 respondents.

The main conclusion of this thesis is that artisanal chocolate perception among consumers and non-consumers is similar across four dimensions: 'healthy product', 'unique product', 'product that conveys love' and 'ingredient quality'. The key differences are in price and availability perception, as non-consumers believe artisanal chocolate is more expensive and harder to obtain. Nevertheless, this group shows willingness-to-try and a positive perception of artisanal chocolate.

These insights help understand consumer behaviour towards artisanal chocolate and may be an important tool for brands to develop future strategies.

Keywords: artisanal, chocolate, Portuguese, perception, consumer

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Resumo

Título: Análise dos consumidores portugueses de chocolate e suas perceções da tendência artesanal

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O objectivo desta dissertação é fornecer uma perspectiva da recente tendência artesanal no mercado de chocolate em Portugal. Mais especificamente, foca-se em analisar os consumidores portugueses e em perceber as diferenças entre quem consome chocolate artesanal e quem não o faz (os não-consumidores).

Este estudo fornece uma visão geral do panorama do mercado de chocolate, com particular ênfase nas marcas artesanais portuguesas. A metodologia consistiu em ferramentas qualitativas, através de entrevistas individuais com consumidores e produtores, e ferramentas quantitativas, com o uso de um questionário distribuído a 130 indivíduos.

A principal conclusão desta tese é a similaridade da perceção do chocolate artesanal entre consumidores e pelos não-consumidores. Esta parecença assinala-se em quatro dimensões: produto saudável, produto único, produto que 'transmite amor' e 'ingredientes de qualidade'. As diferenças de perceção assinalam-se ao nível de preço e ao nível de acessibilidade: os não-consumidores acreditam que o chocolate artesanal é mais caro e mais difícil de obter do que o chocolate que costumam consumir. Todavia, o grupo demonstra uma opinião positiva e vontade de experimentar (*willingness-to-try*) o produto.

Estes resultados permitem obter uma melhor compreensão do comportamento do consumidor em relação ao chocolate artesanal e podem ser instrumentais no desenvolvimento das futuras estratégias das marcas.

Keywords: artesanal, chocolate, Portugal, percepção, consumidor

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Chapter 1.

Introduction

1.1. Background

Craft markets were the first markets to exist. With the development of production techniques and expansion of the multinational ideal concept, craft was gradually put aside, as it could not compete in terms of costs, speed or product uniformity.

Today, craft products have resurged and are becoming competition for well-established players in several industries - for example, Lush (cosmetics), LGR (eyewear), Tom Faulkner (furniture), to name a few. Specifically in the food and beverages industry, craft coffee and beer have been successful: in the US 12.3% of consumed beer is artisanal (BA, 2017) and sales grew 8% in 2017 (Daniels, 2017); coffee, with 59% of US consumption being specialty (NCA, 2017), is considered to be in its "Third Wave" (Gold, 2008). In Portugal, since the birth of the first craft beer brand in 2011, there have been over 100 different new initiatives as of January 2017 (CAP, 2018).

Several factors explain the appeal of artisanal. Firstly, the existence of a post-Fordism culture that believes different groups of customers are better served with small batches of specialized goods (Kumar, 2004). Secondly, the rise of the millennial generation, with a twofold effect: on the one hand, it is a generation that values uniqueness and ethical production practices (Bucic et al., 2012), both commonly related to artisanal techniques. On the other hand, Millennials are also defined by their distrust of corporations (Winograd and Hais, 2014), hence being more inclined towards small stores and the sense of community they convey. Finally, the technological revolution and growing adoption of online information search on goods and services has shaped consumers, making them more demanding and rational (Silva, 2017).

1.2. Objectives and research questions

This dissertation focuses on the artisanal chocolate market in Portugal and it aims to understand who is driving the growth of such trend – namely, consumers. Knowing who consumers are, as well as their motivations and perceptions of artisanal chocolate will allow tailoring the market offerings, improving satisfaction and increasing demand. Additionally, this thesis also wishes to address the question of who the non-consumers of artisanal chocolate are, as they comprise the potential, untapped market and may provide insights necessary to the development of the brands.

The following are the research questions this dissertation will strive to answer.

- Part One: **Who are the chocolate consumers?**
    1. What are the demographic characteristics of the consumers, in terms of age, gender, occupation, education and area of residence?
    2. How is consumption, in terms of frequency, average level of spending per purchase and purchase objective (for self or to offer)?
    3. Do consumers like to try different products?
    4. How high is artisanal brand awareness?

- Part Two: **What are the motivations of artisanal chocolate consumers?**
    5. Do consumers believe artisanal chocolate is healthier?
    6. Do consumers believe artisanal chocolate has better taste?
    7. Do consumers believe artisanal chocolate has better quality ingredients?
    8. Do consumers choose artisanal chocolate due to it being produced in Portugal?
    9. Do consumers believe artisanal chocolate is a better proxy for showing love when gifting?

10. Do consumers experience a sense of community when choosing artisanal chocolate?
11. What is the perception of artisanal chocolate price?
12. Do consumers who choose artisanal chocolate have a close relationship with the producer?
13. Are consumers wary of the hygiene conditions where chocolate is produced?
14. Do consumers believe artisanal chocolate is fairer for farmers?
15. Do consumers believe artisanal chocolate is unique?

- Part Three: **What are the motivations of the non-consumers of artisanal chocolate?**

16. Have non-consumers tried artisanal chocolate?
17. Are non-consumers willing to try artisanal chocolate?
18. Do non-consumers shop online?
19. Do non-consumers believe artisanal chocolate is healthier?
20. What is the perception of artisanal chocolate price?
21. Do non-consumers believe gifting artisanal chocolate is a way of showing love?
22. Do non-consumers believe artisanal chocolate has better quality ingredients?
23. Do non-consumers believe artisanal chocolate has less quality because it is produced in Portugal?
24. Do non-consumers believe artisanal chocolate is fairer for farmers?
25. Are non-consumers wary of hygiene conditions on which artisanal chocolate is produced?
26. What is these consumers' perception of the target market of artisanal chocolate?
27. What is the perception of non-consumers of availability of artisanal chocolate?
28. What is the perception of non-consumers of the uniqueness of artisanal chocolate?

1.3. Relevance

1.3.1 Academic Relevance

The academic relevance of this study derives from suggestions from other studies, such as Fuchs et al. (2015). It contributes with country and sector-specific examples on the topics of artisanal shopping and product innovation. It also builds the literature on Portuguese consumers and provides a description of the chocolate market.

1.3.2 Managerial Relevance

This study will be particularly relevant to the artisanal chocolate brands working in Portugal. Hopefully it will allow for a better understanding of the competing brands and of consumers, their preferences and motivations in choosing this type of product, which will contribute to an improvement of the consumer-brand relationship and ideally increase brand loyalty. Furthermore, it will delve into the perceptions of artisanal chocolate by non-consumers, i.e., consumers of chocolate that is not artisanal (industrial).

1.4. Scope

This dissertation is integrated in the Product Innovation segment, and it will focus on the chocolate market. Striving to understand product innovation in this area, it will specifically look into the artisanal trend that has been becoming increasingly significant, and how it has been shaping chocolate offerings. The market is restricted to Portuguese artisanal brands - meaning those who produce chocolate in Portugal, thus removing resellers – that can be present in brick-and-mortar stores, in online stores, or both. To narrow the object of study further, only brands that produce chocolate per se (chocolate bars) are considered, which excludes brands such as *brigadeiros*.<

1.5. Outline

Chapter two provides a market overview of the chocolate industry in Portugal, its main players and numerical data. It also reviews the literature available on the topic of artisanal chocolate, namely food consumption and the aspects of artisanal.

The third chapter explains the methodology used throughout this study.

On chapter four, the research questions are investigated using quantitative analysis.

Chapter five presents conclusions and considers the limitations of this work, and further research suggestions are offered.

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Chapter 2.

Contextualization

2.1. Market overview

The European chocolate confectionery market is in the maturity phase of its lifecycle. In 2014, it reached the value of 35.575€ million, showing steady growth rates. Being well established, this industry has four main players that represent 60% of its worth: Mondelez International Inc. (Milka, Toblerone, Cadbury), Mars, Inc. (M& M's, Mars, Twix, Maltesers, Dove), Ferrero Group (Kinder Chocolate, Ferrero Rocher, Mon Cheri) and Nestlé S.A. (KitKat, Smarties, Crunch, After Eight, Baci, Caja Roja, Lion) (Marketline, 2015). The product offering is diverse and adapted to different segments.

Apart from the Ferrero Group, these players are present in other industries besides confectionery, such as pet food and healthcare nutrition (Nestlé, nda). The four companies operate in over 90 countries combined, with a large number of distribution centres. Mondelez, for example, controlled about 130 distribution centres as of 2016 (Vault, nd), which implies high entrance barriers.

In what regards the European market distribution, the main channel are supermarkets and hypermarkets, which account for 35.5%, followed by independent retailers (23.1%), convenience stores (20.9%), specialist retailers (5.1%) and others (15.6%) (Marketline, 2015).

Focusing specifically on Portugal, the chocolate market reached sales of 200€ million in 2017, with an annual per capita consumption of 2kg. This number is low in comparison to other European countries. For instance, Spanish per capita consumption is 4kg/year and Swiss per capita consumption is the highest in the world, at about 9kg/year (McCarthy, 2015). This is partially attributed to the high taxes on chocolate in Portugal: it is the highest in Europe at 23% (Spain – 10%), which leads to higher prices (Alves, 2017). To illustrate, a 100g Milka Oreo chocolate bar costs 1.59e in Portugal and 0.83e in Spain. Nevertheless, experts consider Portugal to show a sustained growth trend, both in demand and expenditure (Magazine, 2017).

Overall, the chocolate confectionery market is mature, showing strong incumbents that provide large variety across all segments, high entrance barriers and small growth rates. It therefore follows that new entrants must offer an innovative product to be successful. It is essential to take advantage of the new trends in consumer preferences.

Nielsen has studied the Portuguese consumer trends in several reports. The findings include:

1. The Portuguese concern with health impacting food choice is higher than the European average, with 53% of consumers choosing sugar-free products (Nielsen, 2016a);
2. The Portuguese consumer is adept of online shopping, although food purchases are one of the lowest segments. In Nielsen (2017a), free delivery, more available information about the product and the option to track orders are suggested as ways of incentivizing online food shopping;
3. Regarding brick-and-mortar stores, consumers are willing to visit specialized stores. Their motivations are finding products not available elsewhere and enjoying an overall better shopping experience (with better service, layouts and fidelity programs) (Nielsen, 2017b);
4. Price, promotions and healthy ingredients are the main drivers of choice in the country (Nielsen, 2016b).

2.1.1 The Portuguese artisanal chocolate market

The following is an overview of the Portuguese brands.

Arcádia

Created in 1933 in Porto, it is the oldest in existence and the biggest in the country. Present both online and in brick-and-mortar stores (28 in the country). It offers an exclusive programme – Clube Arcádia – and an extensive line of products. Home delivery costs approximately 7€ and store delivery is free and available solely in Lisbon and Porto. It has a very active online presence, with 30.000 followers on Facebook.

Value proposition: a brand that manages its traditional routes with innovation in product and consumer experience.

Chocolataria Equador

Porto based since 2009, where it has three stores and another in Lisbon. According to the founders, these are street stores in traditional, high-end neighbourhoods, so as to maintain the brand image. With an average presence online (no online store, website under construction, and a fairly updated Facebook page (16.000 followers), the brand positions itself as "an appeal to the senses and an awakening of emotions". It is interesting to notice the investment in brand image – retro-inspired wrapping paper with vintage postcards and the creation of characters in the fictional Vila do Lago help form the imagery of the brand.

Value proposition: the vintage-inspired brand image.

Chocolateria Delícia

Created in 2007 in Viseu, it has one brick-and-mortar store where it is possible to watch the production process, as well as an online store that distributes to the whole country. Its mission is to sustain the chocolate tradition in today's world, achieved with a variety of flavours such as hazelnut or balsamic vinegar. Fairly present online, it has 6.000 followers on Facebook.

Value proposition: adapting tradition to the 21st century world.

Pedaços de Cacau

Established in Porto in 2014, this brand has an online store that ships to the whole country (4.9€ delivery fee) and, while it does not have its own store, it is present in several points-of-sale in the

North. Pedaços de Cacau focuses its positioning on Quality, described by three points: the Belgian chocolate used in making its product has a sustainability origin; it features a *Portugal Sou Eu* stamp (which recognizes Portuguese small and medium companies with considerable added value); it lists the several different awards obtained in competitions. The brand has high online presence, with 8.600 followers on Facebook, as well as frequent participation in events.
Value proposition: product quality.

Bocasuja
Established in 2014 in Braga, Bocasuja describes itself as a combination of Art and Chocolate, aiming to be "a liberation act where one tastes something without fear of messiness". Its offering is distinct from other stores, as it includes dolls and other 'constructions'. Lacking a store of its own, the brand relies on the online store and resale points throughout the country. However, there is no information to the consumer on where these points are, and the online store is not accessible through the website. Its Facebook page has few publications and 2.200 followers on Facebook.
Value proposition: consumer experience.

Chocolate com Pimenta
Established in 2012 in Vila Verde. This brand began its activity through an online store (with 4€ shipping fee for purchases under 50€) and several resellers (67 today). Eventually it grew to open its own store in 2014, which claims to add value to its community by being a hub of events (e.g. workshops, live music). It positions itself as adding "creativity to the chocolate world", and particularly representing the region of Minho both in Portugal and abroad. It has a fairly regular presence online and 8.600 followers on Facebook.
Value proposition: the appeal of community representation and contribution.

Cacao diVine
Born in Coimbra in 2013 as the combination of a sommelier and a chocolatier, this brand is sold online (4.5€ shipping fees, free on orders over 100€) and on resellers (which are not specified).

It positions itself as a wine chocolate – and not a liqueur-filled chocolate – and it is distinct from competition due to its cork packaging. Initiatives such as *Acreditar* (part of revenues were donated to a children's cancer institution) help establish it as part of the community. This brand has a regular online presence with 12.800 followers on Facebook.
Value proposition: a unique product and packaging.

Feitoria do Cacau
Created in 2014 in Aveiro, it was the first bean-to-bar chocolate brand in Portugal, meaning it oversees all steps from acquiring the cocoa bean to actually producing the chocolate. It is sold online (5€ flat shipping fee) and in 28 national resellers (and 8 international resellers). With a fair online presence (6.000 followers on Facebook), the brand positions itself as concerned with the well-being of cocoa farmers, focusing on paying fair wages for high quality ingredients.
Value proposition: concerned with all the steps of production and its social impact.

Theo Kakaw
From Porto since 2012, this brand is mainly (but not limited to) targeted to celiacs, as its products are gluten-free. Its only store is located inside a hospital, being the first in Europe, which helps to build on the health benefits marketing (e.g. preventing cardiovascular diseases, slow aging and acting as a diuretic). The brand has no presence online besides its website.
Value proposition: chocolate as a health driver, regardless of medical conditions.

Maria Chocolate
Established in 2013, in Vila Nova da Gaia- This brand has an online store (flat fee of 5e) and a brick-and-mortar store in its factory, besides being sold by several resellers. It has a strong internet presence (21.000 followers on Facebook) and regularly collaborates with TV shows. It stands out from other brands due to its commitment to customization: it not only is available for bigger events, such as weddings, but also allows individual customers to personalize their products.
Value proposition: customization.

Denegro

Established in 2007, in Lisbon. One of the first brands in Portugal, it concentrates its efforts on the one store in Lisbon. Denegro has succeeded with a fair presence online (9.400 followers on Facebook) by partnering with different firms, such as TAP and Millennium BCP and by marketing its main ingredient – Callebaut, a reputable Belgian chocolate brand that focuses on sustainable farming practices.

Value proposition: Belgian-base chocolate with respect for farming conditions.

Figure 2.1 illustrates a positioning map that compares brands across two dimensions: presence (from online to physical) and focus (from product to imagery). Given that Arcádia is a much more mature brand, it has managed to develop in all directions, reason why it is not placed in the map. The map summarizes the information provided above and it gives two main insights. Firstly, brands tend to focus on their physical presence, even when their origin was online – all are available in-store, self-owned or through resellers. Secondly, players at either end of the focus dimension are especially physically present.

2.2 Literature review

This section provides an overview of the theoretical approaches to artisanal chocolate, analyzing food consumption and the artisanal trend.

2.2.1 Food consumption

As a main source of consumers' spending, as well as a culturally and economically relevant aspect of society, food has long been studied. Since the early 1940s, models have been proposed, growing in detail and complexity with the increase in literature on consumer behaviour and choice processes. Examples of such models include the analysis of food habit forces by Lewin (1943), Maslow (1943) hierarchy of needs and the Conceptual Model of Food Choice (Furst et al., 1996). Alongside food consumption, the body of literature on chocolate is also quite extensive, both at popular and academic levels, ranging from health aspects, to cultural histories and to industry reports (Cidells and Alberts, 2006).

Figure 2.1: Positioning map of Portuguese artisanal chocolate brands.

The growth in literature of consumer behaviour and choice-process has allowed for a deeper understanding of the chocolate consumer. In Benton et al. (1998), a three-factor equation is suggested, composed of Craving, Guilt and Functional Approaches. Later, in Januszewska et al. (2001) the Conceptual Model of Chocolate Choice is introduced. This model is perhaps the most complete in what concerns analysis of chocolate consumption today.

The Conceptual Model of Chocolate Choice (COMCC) (see Figure 2.2) explains consumption of chocolate in two complementary ways:

- *The Core*. At the heart of the model there is attribute importance and the beliefs of the benefits of consumption. While attribute importance is a common aspect of the choice-making process (it measures, for example, how important price, taste and country-of-origin are, as included in this model), benefit beliefs introduce other, equally relevant factors that are more specific to the chocolate topic (broadly, this takes into account health and energy);

- *The Ring*. Three elements influence the importance of an attribute and the formation of beliefs:
  - *Culture*. Incorporates the interregional and international differences in consumers. This is irrelevant to this dissertation, as it focuses in solely one small country with little regional disparities. However, an interesting component is the impact of the country-of-origin effect, which is defined as the influence a product's country of manufacture might have on consumer's decision process or subsequent behavior (Elliot and Cameron, 1994). This heuristic applies to several product categories such as technology, goods and food, being often perceived as the most relevant heuristic (Camgoz and Ertem, 2007);
  - *Demographics*. Introduces the gender and age components;
  - *Personality*. Self-control, self-identity and other traits will influence, for example, how important an attribute is, as they relate with how prone to craving a consumer is, how peer-pressure affects their consumption and how much satisfaction they can derive from chocolate.

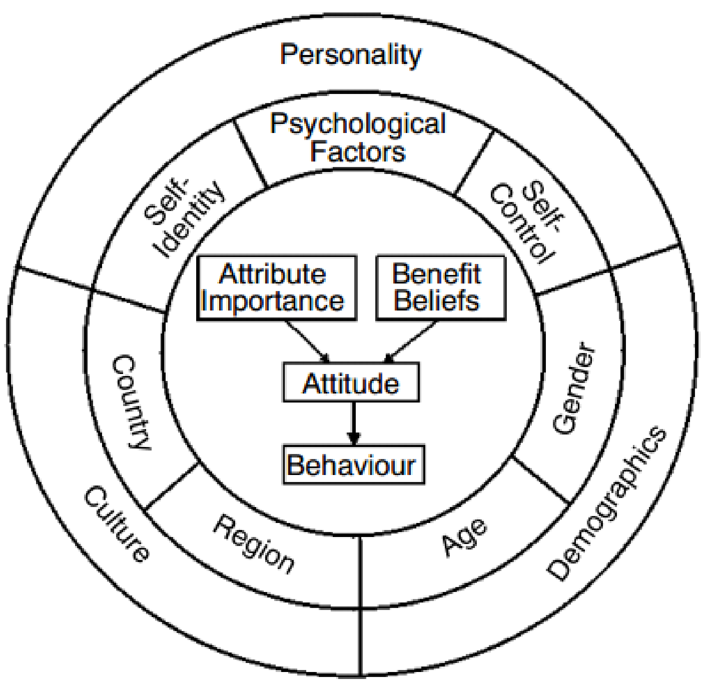

Figure 2.2: Conceptual Model of Chocolate Choice (COMCC). Source: Januszewska et al. (2001).

Building from this last concern, it is relevant to mention hedonic consumption in this review. Hedonic consumption has been widely studied ever since Hirschman and Holbrook first introduced the concept in 1982, describing it as the "facets of consumer behaviour that relate to the multisensory, fantasy and emotion aspects of product usage experience." (Hirschman and Holbrook, 1982). In the specific case of food consumption investigation, chocolate has been recurrently used to embody hedonic food (Sondhi and Chawla (2017), Kim and Kim (2016), Poelmans and Rousseau (2016), Khan and Dhar (2010)). Besides using chocolate as a token example, few studies have delved into the hedonic motivations of chocolate consumption. Far and few examples counter this tendency. Besides the aforementioned model, in Zarantonello and Luomala (2011) the existence of four group of consumers based on diary-analysis is argued (with some criticism in qualitative data collection); in Poelmans and Rousseau (2016) three distinct groups of Belgian chocolate consumers are identified (which is not adequate to this dissertation, since Belgium and Portugal share little cultural similarities); in Arnold and Reynolds (2003) five groups are identified according to a six-factor scale of hedonic shopping motivations.

These attempts at understanding the chocolate consumer are of merit. They use different approaches, but it is relevant to state that all have in common the usage of the price and country-of-origin attributes in their research. However, none consider mode of production, and therefore none are fully suited to answer the questions raised by this dissertation.

2.2.2 The aspects of artisanal

The mode of production is key in this dissertation. As mentioned, chocolate has been the subject of thorough investigation on different optics, but the trend of artisanal chocolate – being fairly recent – has not been properly analysed. As a starting point to this undertaking, it is important to understand what artisanal means.

In Leissle (2017) it is stated that "artisanal" is a floating signifier – essentially, it is a word that has no defined meaning and therefore can adopt multiple understandings. The author defends that this concept is used "to distinguish their [US chocolate makers] production ethos from that of multinationals" – however, because in the marketing context this word is undefined, these multinationals can adopt it into their lines in however manner they prefer. As a recent example, there is the Nestlé line Le Recettes de L'Atelier, which claims to be "produced with an artisanal spirit and 100% natural ingredients" and sol d at a higher price level (Nestlé, ndb). It follows that artisanal is not necessarily tied to the mode of production. It then comes down to ethos. Ethos can roughly be described as character – in this case, the brand character, or brand meaning. Brand meaning is one of the essential blocks in creating brand equity and in few words it is "what the brand stands for" (Lassar et al., 1995), and it is particularly important in terms of strength (i.e. how much customers associate the brand with the image), favourability (how much customers identify with this image) and uniqueness (how distinctively the brand is associated). Consequently, it reasons that customers strongly identify with the image that artisanal creates, and not necessarily with its attribute promises – whether it is flavour, quality or something else. In other words, a specific definition of 'artisanal' is not necessary – what matters is understanding what construct consumers believe to be choosing.

A first strand of artisanal brand imagery lies within the handmade effect (Fuchs et al., 2015). It is one proposed explanation for this relationship between consumer and product; it aims to explain the continued existence of handmade products even when manufactured counterparts – which consistently present higher quality – are offered, and it does so by proposing love as a core driver.

Love, which in the marketing context has little to do with attributes and much to do with imagery (also borrowing from hedonic consumption), is a feeling that consumers strongly associate handmade products (they "contain love"). Therefore, they are particularly sought after when used as gifts to significant people, in what could be described as a proxy of the IKEA effect (Norton et al., 2012) – in simple terms, there was work and effort put into this unique product, and therefore it positively translates into the relationship of giver-given. The 'marketing of love' is a crucial part of the success of artisanal brands.

In a related note, it is important to detail the uniqueness factor. As stated in Fuchs et al. (2015), this is a positive moderator of the 'love' impact in the demand function, meaning levels of uniqueness may be relevant. In the case of chocolate bars, uniqueness was evaluated in terms of packaging and ingredient combination, as they appeal to vision and taste – regarded as the most important senses (Krishna, 2011) in the consumption of chocolate.

Another strand of the imagery suggested by artisanal brands relates with health. Health concerns are increasingly weighing in consumers' decisions (Nielsen, 2016a) and adopt different shapes as illustrated in Figure 2.3.

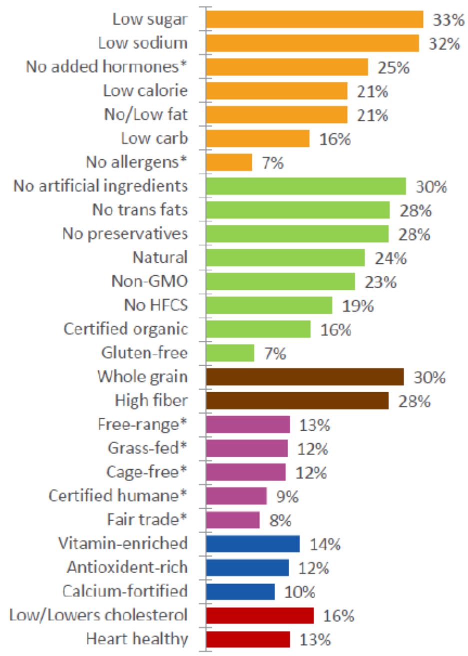

Figure 2.3: Product claims consumer seek when purchasing a food product. Source: FMI U.S.

Such shapes include sugar quantity, natural ingredients and organic ingredients. As stated in Padel and Foster (2005), personal health is a strong motivating factor for buying organic. The dilution of artisanal and organic concepts can be further understood by analysing the authors' linguistic map, which shows word associations to 'organic' (see Appendix A).

Finally, the social and environmental aspects of artisanal ("altruistic motives", as defined in Padel and Foster (2005)) are also becoming more important. This trend materializes in the fairtrade initiative, "a global movement made up of a diverse network of producers, companies, shoppers, advocates, and organizations putting people and planet first." (USA, nd). Despite the controversy of their real impact and advantages, fairtrade products have been gaining market share and represent an increasingly higher concern for consumers (Hulm et al., 2006). Similarly to 'organic', consumers often encompass this concept with artisanal, as it mostly focuses on small-scale producers (Organization, 2009).

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Chapter 3.

Methodology

3.1. Methodology approach

According to Aaker et al. (2013), there are three approaches to marketing research:

- *Exploratory research*. Used when dealing with a new problem on which little investigation has been done. It is highly flexible, unstructured and qualitative, with vague initial hypothesis. Researchers must be ready to adapt to different information.
- *Descriptive research*. As its name suggests, it has the goal of providing a snapshot of an environment at a given point in time (for example, of brand perceptions or consumers demographics). Hypothesis are tentative, and relationships are not causal in nature.
- *Causal research.* It builds on descriptive research and aims to explain the relationships between variables through quantitative data. It uses statistical methods and therefore has specific questions and hypothesis. Qualitative data may also be collected (Saunders et al., 2016).

This dissertation uses causal research with the objective of understanding the relationships between consumers' perceptions of artisanal chocolate and their identification with being an 'artisanal consumer'. Primary, both qualitative and quantitative, data were collected, using interviews and a questionnaire. The latter was distributed through the Qualtrics platform and statistically treated using SPSS 24.0 for Windows.

3.2. Primary data

3.2.1 Qualitative data

The qualitative data used in this dissertation was collected through interviews. In-depth interviews can be nondirective and semistructured, according to the amount of orientation provided by the interviewer (Aaker et al., 2013). Semistructured interviews were used, as this allowed for better topic management. Given the time required to perform this technique, both from the researcher and from the respondents, the number of interviews was limited to four: three of consumers and one from a producer.

The following are the main insights derived from these interviews.

B., male, 23

This interviewee is financially dependent and lives with his parents. He is a frequent chocolate consumer (2 times a week, at least), but has never tried artisanal chocolate. When asked for chocolate brands, his top-of-mind answers were Kinder, his favourite, and Nestlé. He could only recall one artisanal brand after some time – Arcádia. He mentioned never buying chocolate for himself, despite of the frequency he consumes it. Artisanal chocolate perception was “expensive, something I would buy for older people as a gift”. When asked whether he would try it, he answered positively, “but my favourite will always be Kinder”. Artisanal reminds him of something unique, personalized and expensive.

T., female, 28

This interviewee is financially independent and lives alone. She consumes chocolate once a week but it might increase, depending on time of year and of month. Her favourite brand is Nestlé, “the bar with almonds”, but she likes “everything with combinations. I only find Nestlé almond bars in the supermarket, so I usually go for a Twix, because of the caramel.” She has tried artisanal brands, especially Arcádia, and she associates it with special occasions – spending time with her mother, for example. She mentioned liking the environment in the store. Prompted from this, she mentioned not liking to buy artisanal from online stores, because "it lacks the experience. It’s not just the chocolate, it’s the whole thing.”. Artisanal conveys smallness, familiarity, tradition and calm.

M., female, 47

This respondent is a frequent artisanal consumer, from every day to once a week, depending on time of year. She mentioned four different brands (Arcádia, Delícia and foreign others) on top-of-mind. She prefers artisanal due to ingredient quality ("dark chocolate") and combinations, but she still consumes industrial brands, due to being easier to find. Artisanal is associated with manual work, natural ingredients and high quality cocoa.

Producer

This brand identified its main competitors (which corresponded to the brands in study, given the conditions imposed) and believes the market is growing. She characterized the consumer as informed, college educated, from 'the big cities' and in the 30-65 age bracket. Average expenditure level per purchase is 10€, with similar percentages for self-consumption and for gifting. This brand highlighted ingredient quality and uniqueness of product as the main drivers of consumption. Artisanal is associated with small batches, packaging by hand and usage of quality ingredients, preferably Portuguese.

3.2.2 Quantitative data

Quantitative data was collected using a questionnaire of 18 questions. It was divided in a similar format as to the research questions: firstly, it identified respondents that were not Portuguese, then it focused on demographics, followed by questions on consumption habits. It then divided respondents according to how much they identified with the statement "I consider myself an artisanal chocolate consumer". From then, 'non-consumers' (answered below 4) would answer a set of questions and 'consumers' (answered 4 or 5) would answer another one. These were questions in a Likert-scale from 1 (strongly disagree) to 5 (strongly agree).

Care was put into building questions that were clear, logical and not leading nor double-barrelled. Multiple-choice questions had mutually exclusive options and each segment of the questionnaire was separated into a different section (Aaker et al., 2013).

The survey, detailed in Appendix B, was pre-tested by 17 different people and then released.

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Chapter 4.

Statistical Analysis and Discussion of Results

4.1. Data cleaning

The first step in the statistical analysis was cleaning the data. Firstly, missing responses and answers not relevant to this study (i.e., from respondents that are not Portuguese) were removed. Originally, 135 responses were obtained to the questionnaires, of which 127 were of Portuguese nationality. From these, 6 responses were removed from those who do not consume chocolate.

Next, the existence of outliers was analyzed. To do so, the variables were converted into standardized z-scores. None of these were outside the [-3:29;3:29] interval, and therefore no univariate outliers were present at a 5% significance level.

4.2. Sample characterization

The sample – a subset of elements from the population in study (Kumar, 2004) – was composed of 121 respondents, all Portuguese and chocolate consumers. In what concerns respondents' age, there is underrepresentation of people under eighteen years old (approximately 14.9% of the Portuguese population is underage (INE and PORDATA, 2018)). Respondents were mostly female (68.6%). Figures 4.1 and 4.2 illustrate these results.

Regarding education (see Figure 4.3), approximately 81% of respondents have a college education. Since about 35.5% stated they are students, it is safe to say that the education level is likely increasing. A higher education level as been shown to imply higher incomes (INE, 2015)

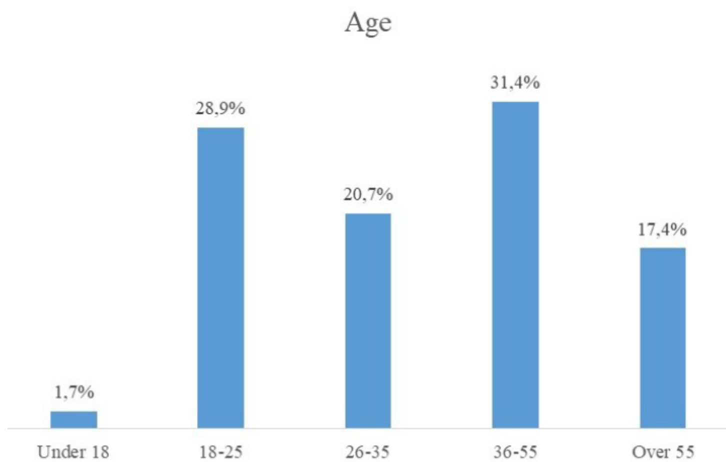

Figure 4.1: Histogram of age distribution in sample.

- over half of the college-educated population is in the top two income segments. Finally, 59.2% of respondents (see Figure 4.4) reside in the Centre of Portugal, which is an overrepresentation, as the area comprises approximately 22.4% of the Portuguese population (INE and PORDATA, 2018).

Research Question 1. *What are the demographic characteristics of the consumers, in terms of age, gender, occupation, education and area of residence?*

According to the sample obtained, the average Portuguese chocolate consumer is a female adult, most likely in the 36-55 year old bracket that lives in the Center area of the country. She has a college education and is currently employed.

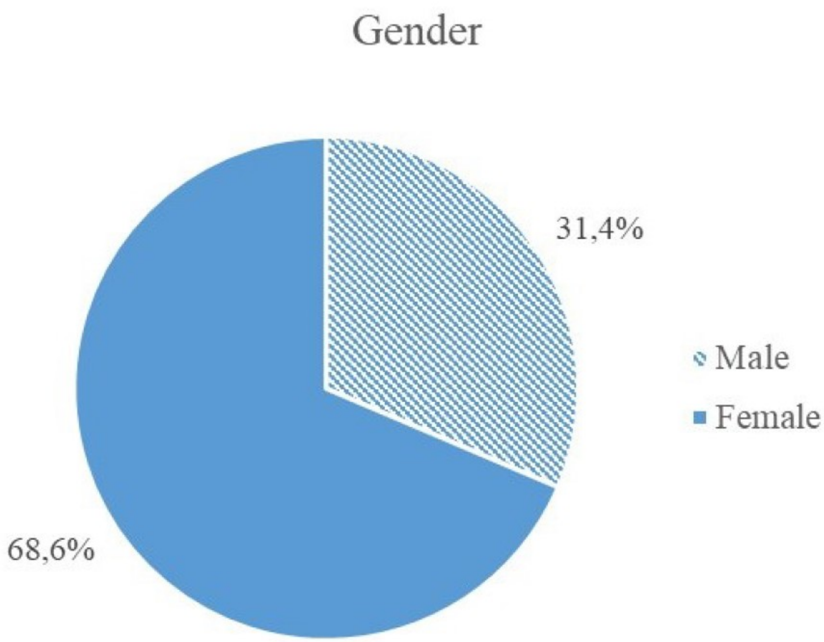

Figure 4.2: Pie chart of gender distribution in sample.

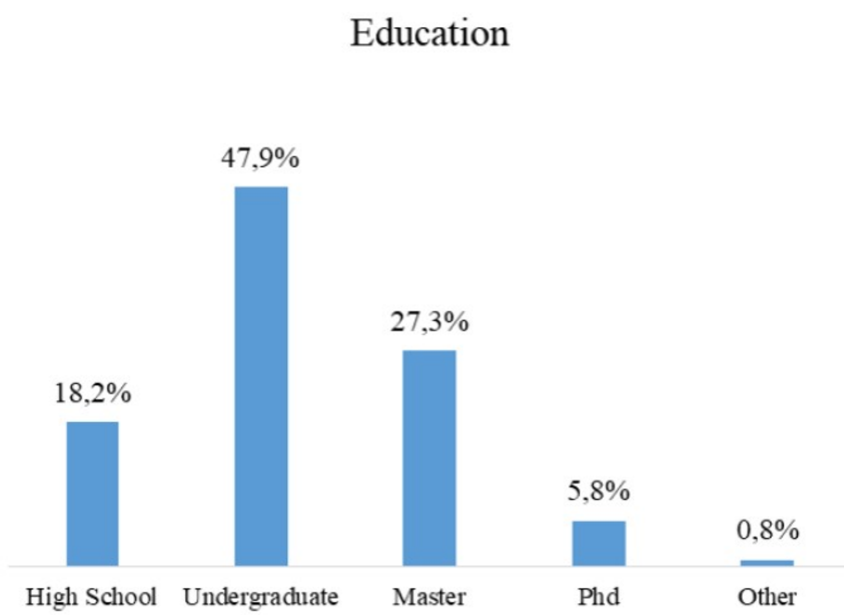

Figure 4.3: Histogram of level of education in sample.

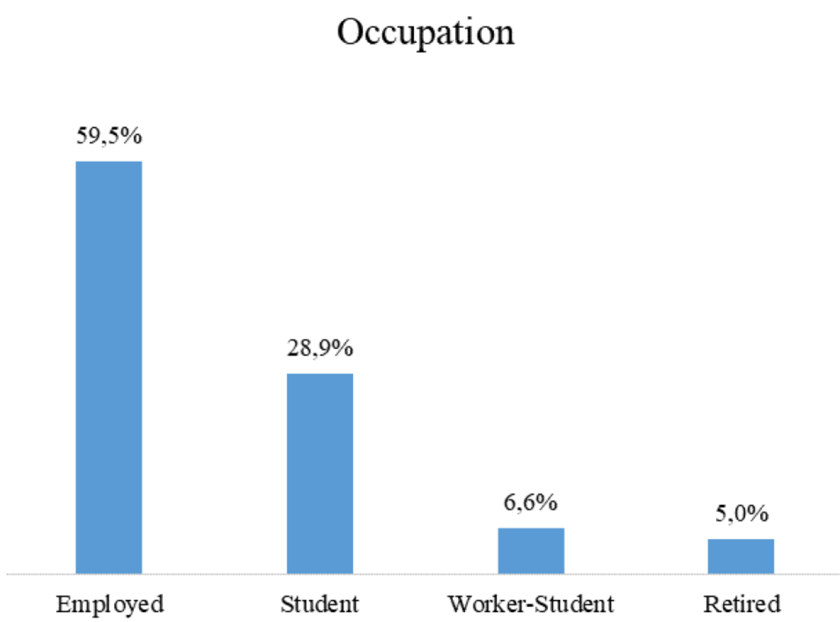

Figure 4.4: Histogram of occupation distribution in sample.

4.3. Consumer habits

This section has two main goals. Firstly, it aims to analyse consumer habits – frequency, type of consumption, expenditure level and variety-seeking- through descriptive statistics, and also brand awareness. Secondly, it tries to understand how these habits relate to respondents' identification with the concept of 'artisanal consumer'. To achieve that, a crosstabs analysis is performed, as dependent and independent variables are non-metric, followed by a Pearson chi-square test of independence, since the contingency tables obtained are not 2x2.

This test will evaluate whether the pairs of variables being analysed are independent (null hypothesis, H0). If p-value is below 0.05, H0 is rejected, meaning there is a statistically significant relationship between variables.

Frequency of consumption

As demonstrated in Figure 4.5, 59.5% of consumers enjoy chocolate every week, while 24% do so less than once a week (2-3 times a month) and 16.5% consume once a month.

Figure 4.6 shows a summary of the results of performing crosstabs to the variables 'frequency of consumption' and "I consider myself an artisanal chocolate consumer". This analysis shows a p-value of 0.175 – this means there is not a relationship between these variables.

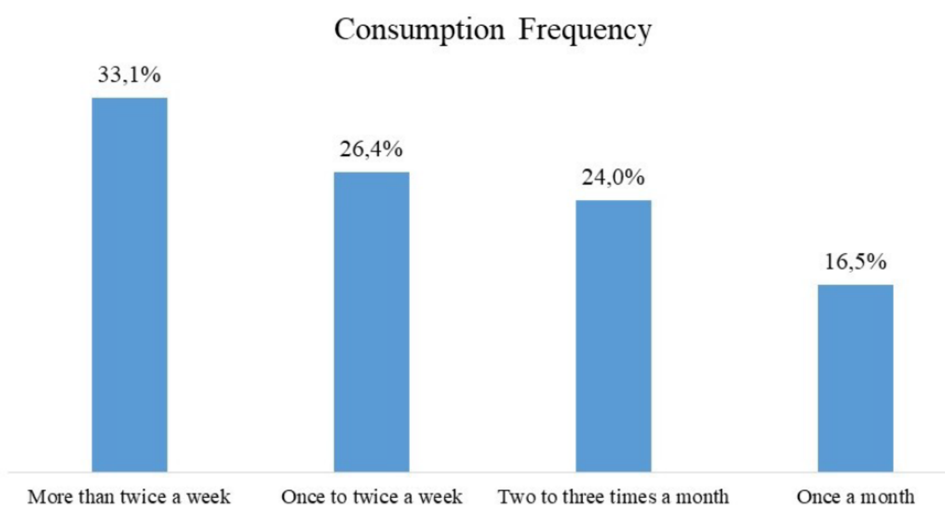

Figure 4.5: Histogram of consumption frequency in sample.

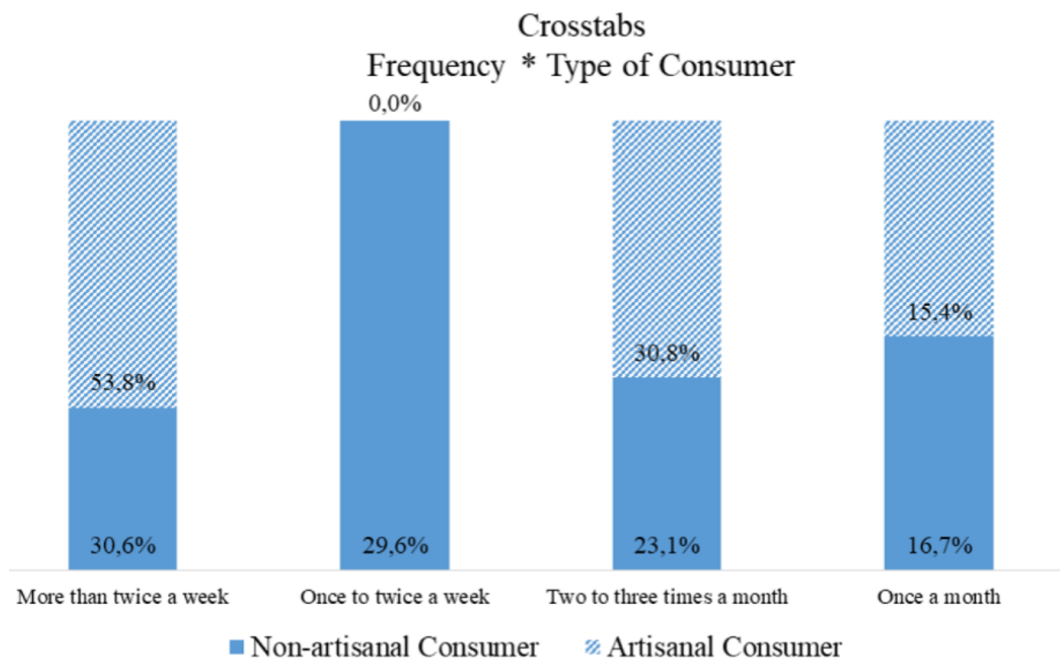

Figure 4.6: 100% stacked columns graph of crosstabs of frequency of consumption and type of consumer.

Type of consumption

Type of consumption aims to analyse the consumption in terms of final goal – either for their own consumption or for offering someone else (see Figure 4.7). Purchases directed towards self-consumption are the most common, with 97.6% of all purchases featuring at least some component for the self. However, gifting still plays an important role, as 44.7% of purchases are presents.

Whether type of consumption relates with identifying oneself as artisanal is tested by using crosstabs. The p-value for this analysis is 0.862, and therefore H0 is accepted – the two variables are independent.

Average expenditure level per purchase

Average expenditure level per purchase was analysed considering type of consumption and type of consumer. Firstly, when comparing purchases with distinct goals, there is a clear difference in

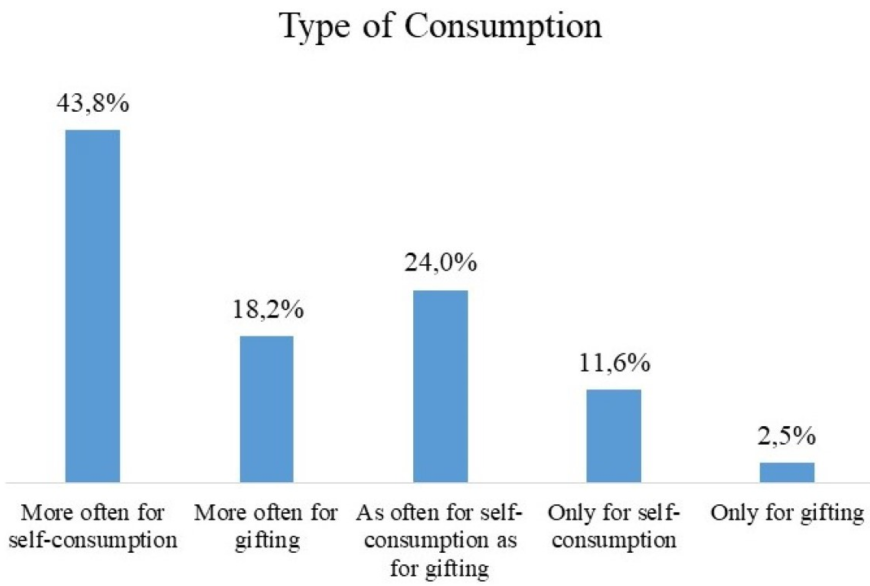

Figure 4.7: Histogram of type of consumption distribution in sample.

money spent, as illustrated in Figure 4.8. Respondents usually spend more when gifting, making purchases over 20€, which does not happen when buying for themselves. Besides that, the most common value for self-consumption lies in the 2€- 4.99€ bracket, while gifting is often in the 5€ - 9.99€.

A crosstabs analysis was performed to understand if expenditure levels for each type of consumption vary from artisanal to non-artisanal consumers. The p-value of chi-square test of average expenditure level per purchase when buying for oneself is above 0.05 (0.08), meaning these variables are independent. The same does not happen when gifting (p-value = 0.034), as can be seen in Table 4.1. This p-value implies there is a relationship between this type of consumption and concept identification.

Table 4.1: Chi-square test for crosstabs analysis of frequency of consumption and type of consumer.

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	27.783	16	0.034
Likelihood Ratio	24.463	16	0.080
Linear-by-Linear Association	0.108	1	0.742
Nº of valid cases	107		

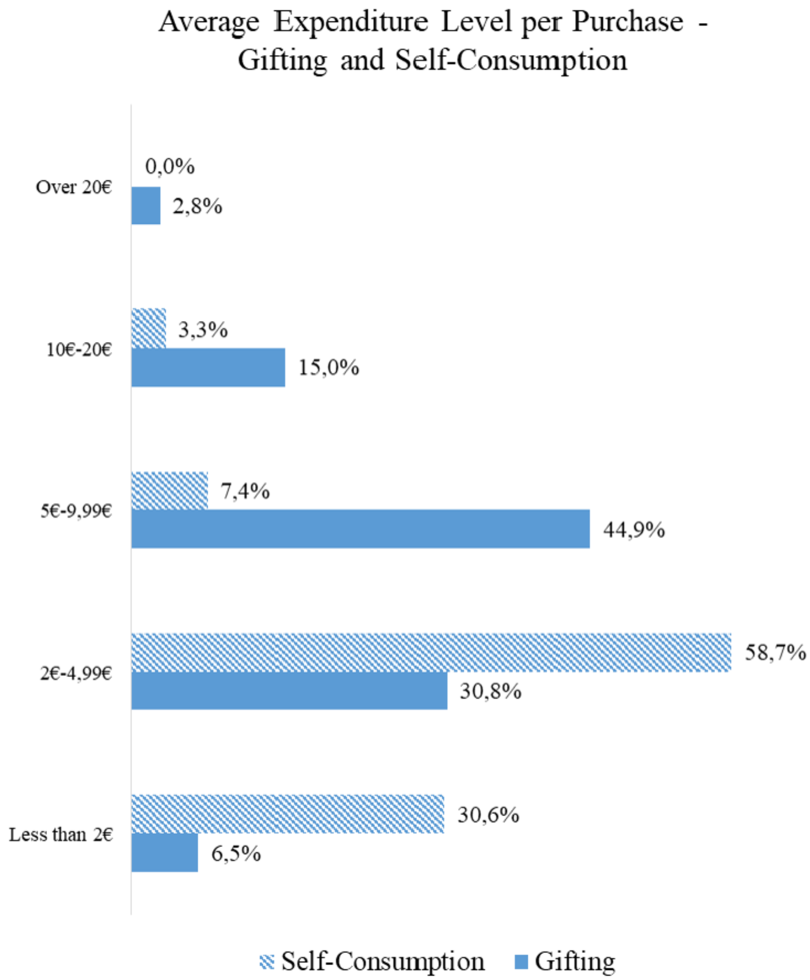

Figure 4.8: Histograms of average expenditure levels per purchase by type of consumption.

When analysing Figure 4.9, it is possible to see that non-artisanal consumers are more varied in terms of average expenditure. More specifically, artisanal consumers tend to spend values in the middle brackets, while non-artisanal consumers reach lower and higher values. Besides this, the second and third highest brackets are dominated by artisanal consumers, with value between 10€ and 20€ having approximately twice as much of artisanal rather than non-artisanal consumers.

A second step after verifying variable dependence is knowing the strength of their relationship. To do so, it is necessary to take into account Cramer's V, as this table is not square and it is the only measure with maximum value of 1. The Cramer's V value is 0.255 (see Table 4.2), which can be interpreted as a low association.

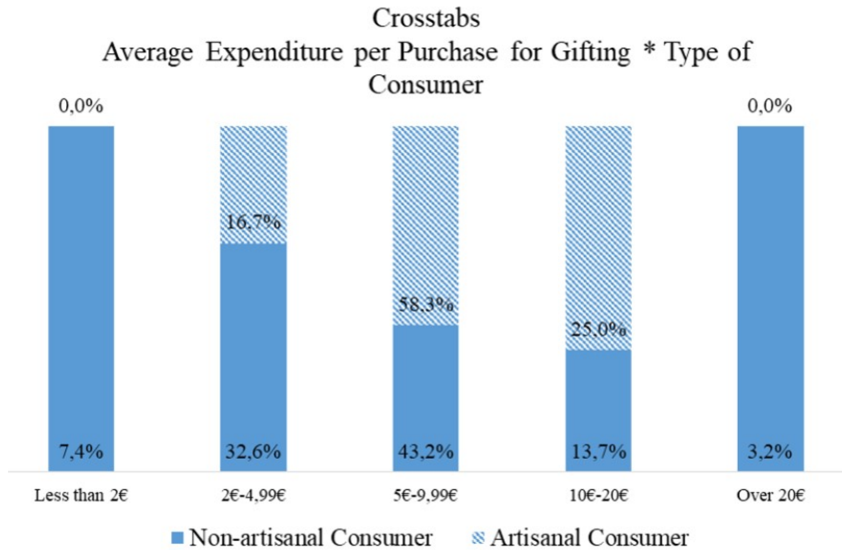

Figure 4.9: 100% stacked columns graph of crosstabs of average expenditure level per gifting.

Table 4.2: Symmetric measures for crosstabs analysis of frequency of consumption and type of consumer.

		Value	**Approx. Sig.**
Nominal by Nominal	**Phi**	0.510	0.034
	Cramer's V	0.255	0.034
Nº of valid cases		107	

Research Question 2. *How is consumption, in terms of frequency, average level of spending per purchase and purchase objective (for self or to offer)?*

Consumption is independent of type of consumer in what concerns frequency and type of purchase. Consumption and type of consumer are dependent of each other when it comes to average expenditure level per purchase with the goal of offering.

Brand and chocolate variety

Finally, this subsection has the goal of studying possible differences between artisanal and non-artisanal chocolate consumers' preference for variety, both at brand level and chocolate level. The histogram shown in Figure 4.10 suggests an overall preference for trying different brands, but not for different chocolate.

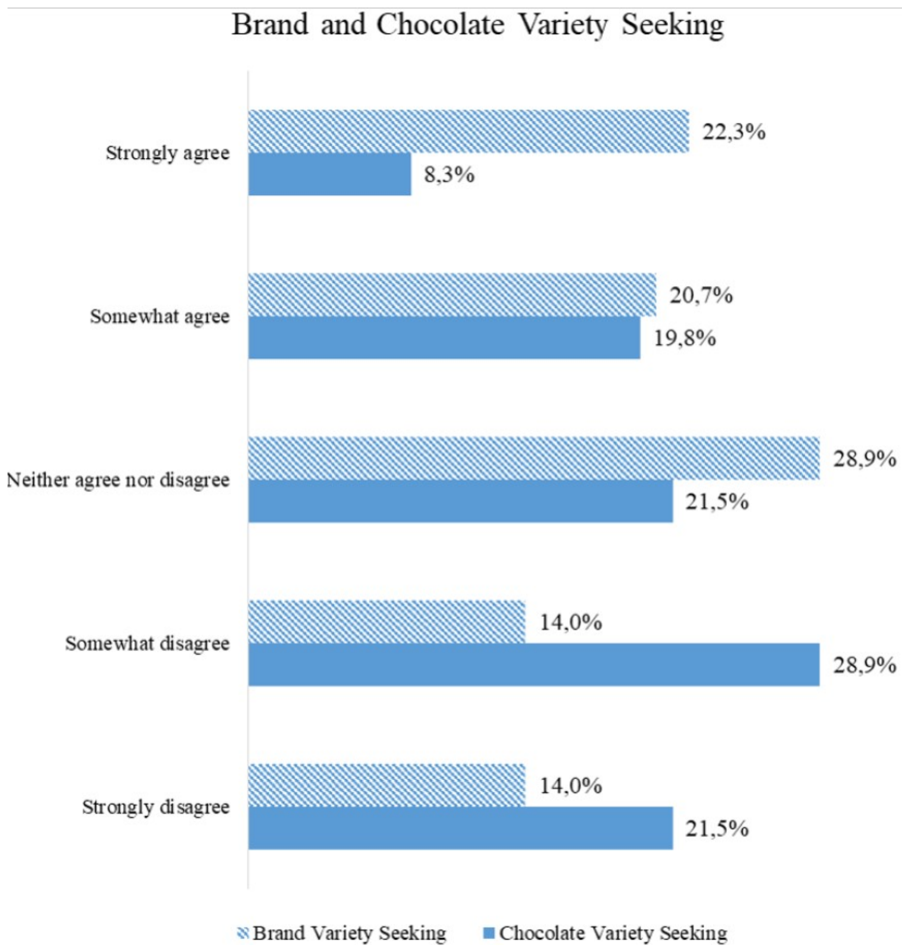

Figure 4.10: Histogram of brand and chocolate variety preference distribution in sample.

To understand if this result is significantly different across consumer type, crosstabs were performed (Figures 4.11 and 4.12). The p-value of the crosstabs of brand variety and type of consumer is 0,005 (see Table 4.3), implying a statistically significant relationship between these variables. Table 4.4 shows the Cramer's V of this relationship. It has a value of 0.266, thus being a weak association. The p-value of the crosstabs of chocolate variety and type of consumer is 0,042 (see Table 4.5), meaning these variables have a statistically significant relationship. Cramer's V is 0.236 (see Table 4.6), and therefore this is also a low association. Nevertheless, figure 4.12 shows an interesting result in what concerns artisanal consumers: they are symmetrically distributed (for example, 7.7% of respondents answered 'strongly agree' and 'strongly disagree'). It also shows that non-artisanal consumers tend not to look for different chocolate – 23.1% strongly disagree with the statement, while only 8.3% strongly agree.

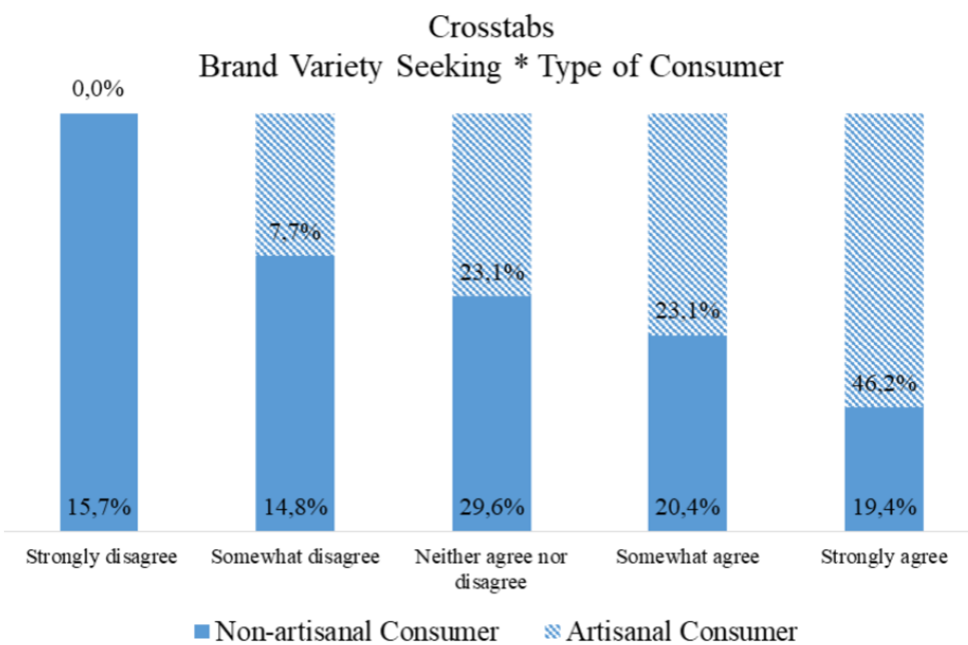

Figure 4.11: 100% stacked columns graph of crosstabs of brand variety seeking and type of

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Research Question 3. *Do consumers like to try different products?*

Consumers' preference for variety is present both at brand level and across chocolate types, and artisanal consumers seem to be more variety seeking than non-artisanal consumers.

Table 4.3: Chi-square test for crosstabs analysis of brand variety and type of consumer.

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	34.309	16	0.005
Likelihood Ratio	33.812	16	0.006
Linear-by-Linear Association	17.866	1	0.000
Nº of valid cases	121		

Table 4.4: Symmetric measures for crosstabs analysis of brand variety and type of consumer.

		Value	Approx. Sig.
Nominal by Nominal	**Phi**	0.532	0.005
	Cramer's V	0.266	0.005
Nº of valid cases		121	121

Table 4.5: Chi-square test for crosstabs analysis of chocolate variety and type of consumer.

	Value	df	Asymptotic Significance (2-sided)
Pearson Chi-Square	26.969	16	0.042
Likelihood Ratio	28.124	16	0.031
Linear-by-Linear Association	9.619	1	0.002
Nº of valid cases	121		

Table 4.6: Symmetric measures for crosstabs analysis of chocolate variety and type of consumer.

		Value	Approx. Sig.
Nominal by Nominal	**Phi**	0.472	0.042
	Cramer's V	0.236	0.042
Nº of valid cases		121	

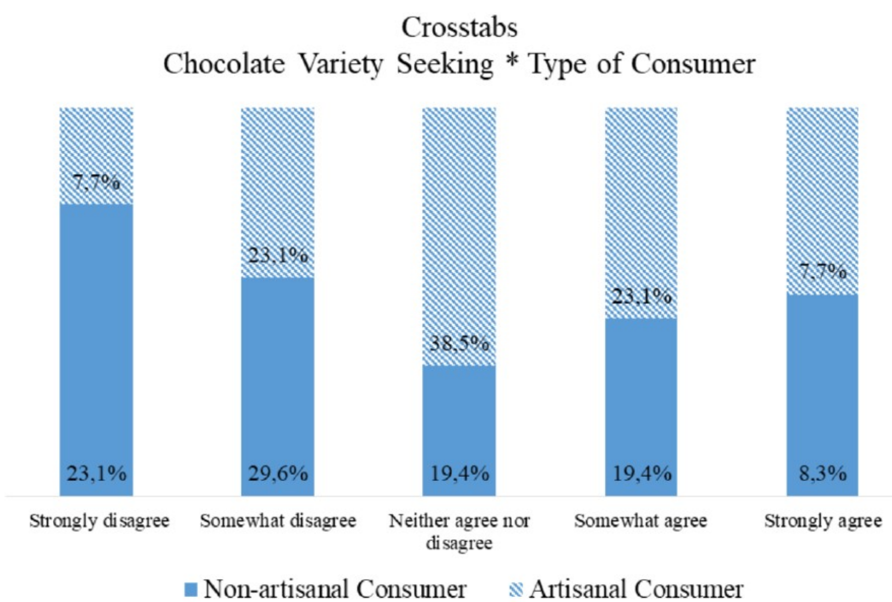

Figure 4.12: 100% stacked columns graph of crosstabs of chocolate variety seeking and type of consumer.

Artisanal brand awareness

This questions aims to know how each brand performs on top-of-mind awareness, i.e., without consumers being prompted.

Research Question 4. *How high is artisanal brand awareness?*

Overall brand awareness is particularly high for Arcádia, which is consistent with the results from qualitative interviews and market analysis. Given that Equador is present only in-store, and only in Porto and Lisbon, it has fair brand awareness. An interesting result is that of Chocolate com Pimenta – being from a less populated city, it shows impressive brand awareness. As expected, brand awareness of artisanal consumers is higher for most brands, with much less consumers knowing none. However, it is surprising to see that only non-consumers identify Pedaços de Cacau. While it still has a low result, there is some indication of potential poor targeting from the brand.

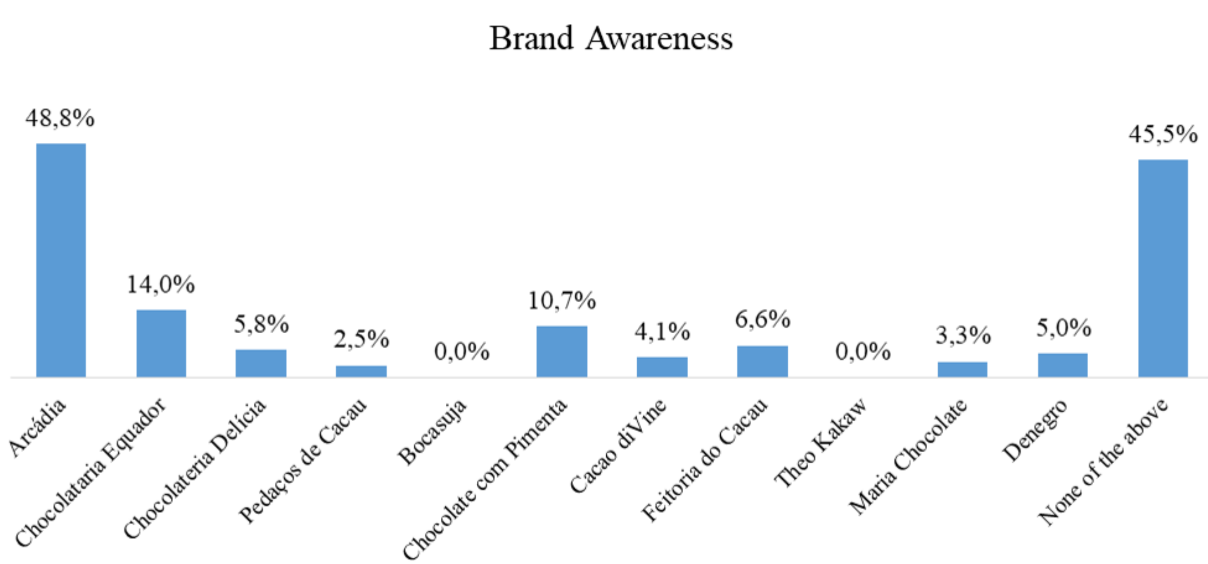

Figure 4.13: Histogram of artisanal brands top-of-mind awareness in sample.

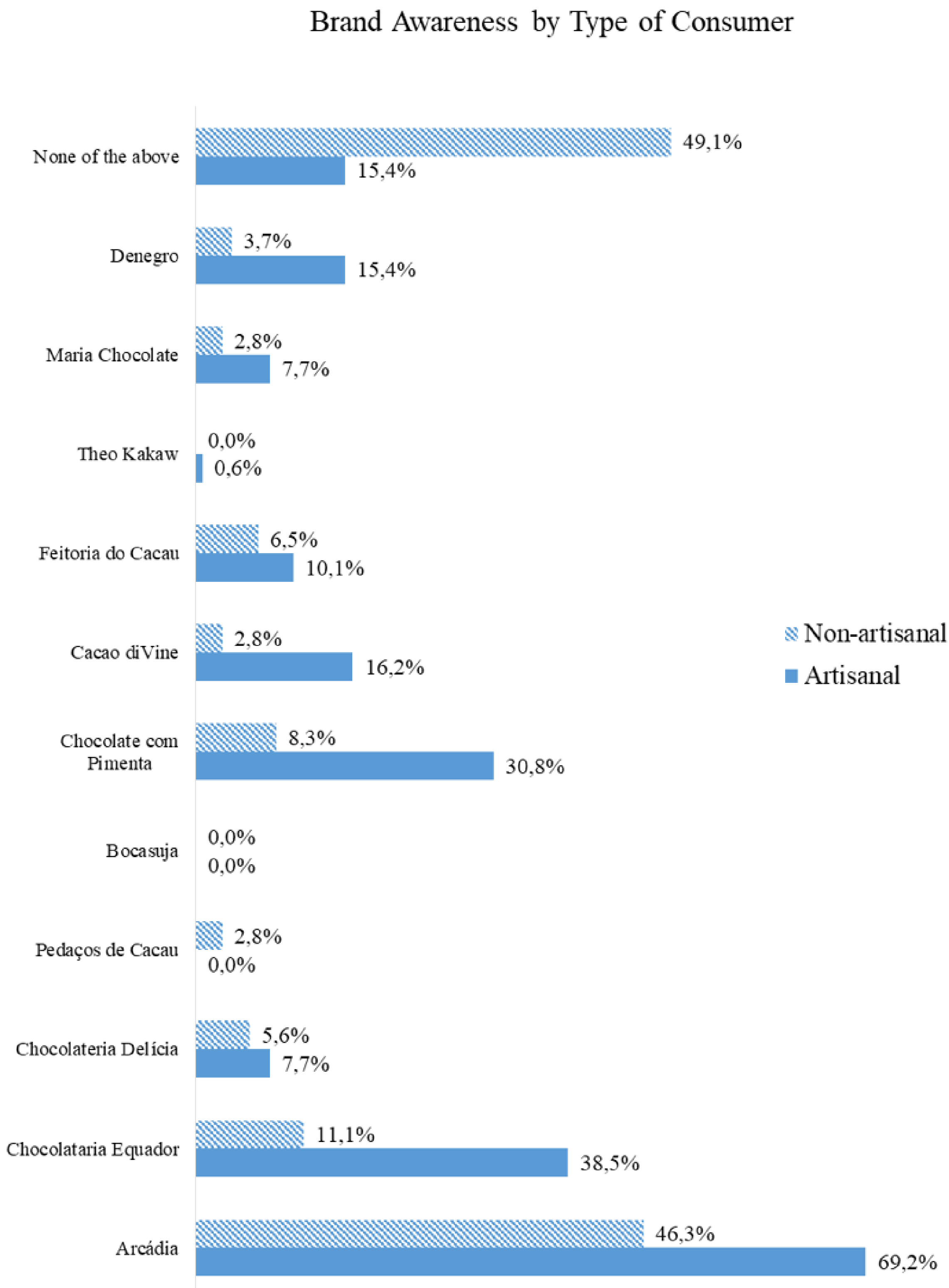

Figure 4.14: Histograms of artisanal brands top-of-mind awareness by type of consumer in sample

4.4. Analysis of consumers and non-consumers

Following the analysis on the consumer of chocolate in general, a next step on this statistical research is to focus solely on each type of consumer.

4.4.1 The consumers of artisanal chocolate

Table 4.7 gives the mean and standard deviation of the results obtained, in a descending order of mean. Each statement was rated in a Likert scale, from 1, “I strongly disagree”, to 5, “I strongly agree”. The standard deviation falls into an interval of [0.483; 1.101], implying some dispersion across responses.

Table 4.7: Mean and standard deviation of answers of artisanal consumers, by descending order

		Artisanal Consumers	
	Question	Mean	Std. Dev.
1	"has igredients of higher quality"	4.70	0.483
2	"is healthier"	4.40	0.516
3	"a more personal gift"	4.30	0.823
4	"has original ingredient combinations"	4.10	0.568
5	"is the result of a labour of love"	4.00	0.816
6	"promotes better conditions for farmers"	4.00	0.816
7	"is better for the country, because it is produced in Portugal"	3.90	0.994
8	"has more original packaging"	3.80	1.033
9	"has higher cocoa percentages"	3.50	0.707
10	"makes me feel like I belong to a community"	3.10	1.101
11	"is produced by people I identify with"	2.80	1.033
12	"has more sugar"	2.50	0.850
13	"is produced in non-controlled hygienic conditions"	2.40	0.843
14	"tastes worse"	1.40	0.843

Research Question 5. *Do consumers believe artisanal chocolate is healthier?*

Healthiness was analysed using three different statements: “is healthier”, “has higher cocoa percentages” and “has more sugar”. The first ranked #2 in the 14-item list above, with a mean of 4.40 and the second lowest standard deviation, of 0,516. In fact, consumers selected only two answers: “somewhat agree” and “strongly agree”, as Figure 4.15 illustrates. Consumers strongly perceive artisanal chocolate as being healthier than industrial chocolate.

In what concerns percentage of cocoa, consumers feel less strongly towards this statement, which scored a mean of 3.5, but still positively in average (see Figure 4.16). It follows that healthiness and cocoa percentage are somewhat different in consumers’ minds.

The statement related to sugar content was posed in a way that prevented consumers from not paying attention to the questions, since high-sugar products are regarded as not healthy. It is therefore consistent that this statement shows a means of 2.50 (respondents do not highly associate artisanal chocolate with sugary products, as Figure 4.17 shows).

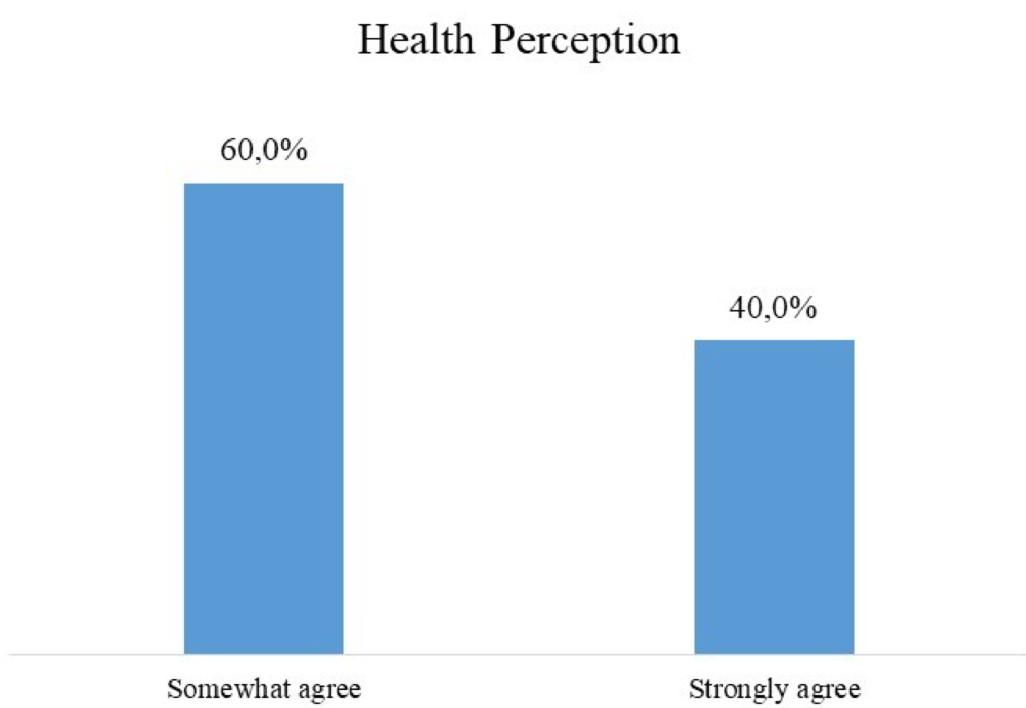

Figure 4.15: Histogram of artisanal consumers’ answers to the statement ‘artisanal chocolate is

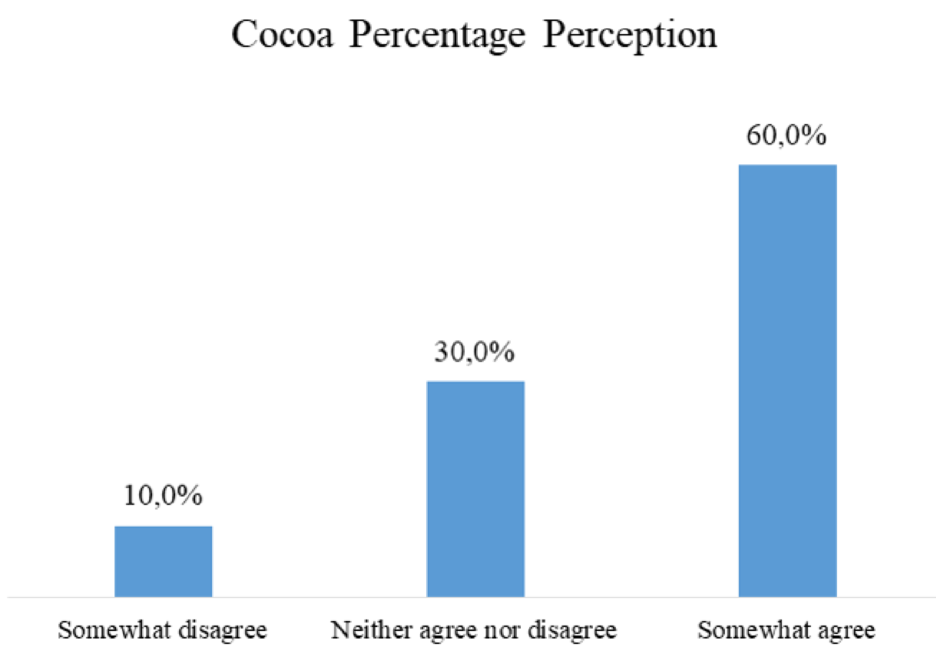

Figure 4.16: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate has higher percentages of cocoa than industrial chocolate'.

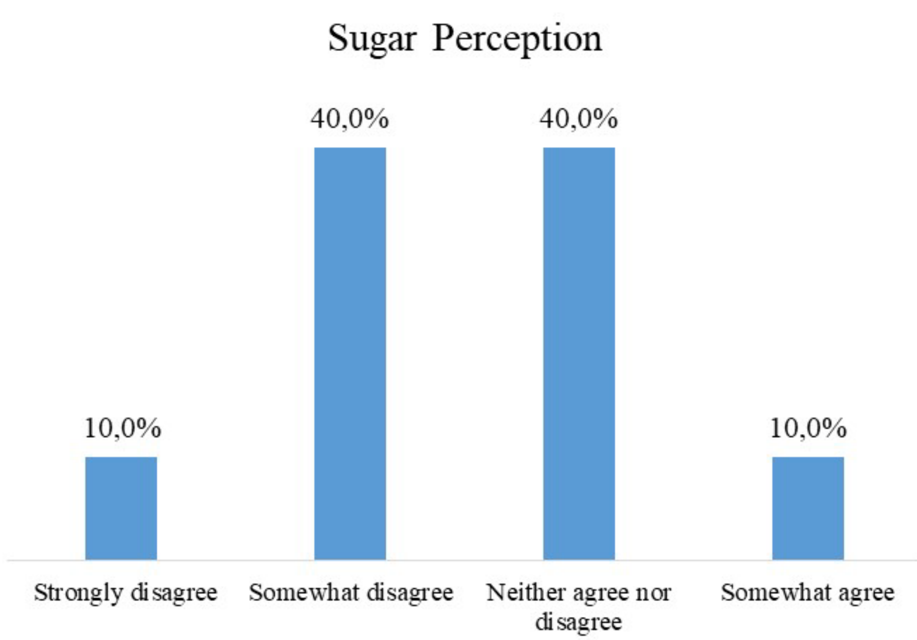

Figure 4.17: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate has more sugar than industrial chocolate'.

Research Question 6. *Do consumers believe artisanal chocolate has better taste?*

This research question follows from the previous one, as healthy products are usually thought to taste worse. This question ranked the lowest in the table above, meaning respondents, on average, do not agree that this statement describes artisanal chocolate (mean=1.40; 1 being "I strongly disagree", as seen in Figure 4.18), and also implying that healthiness and taste do not necessarily share an opposite relationship.

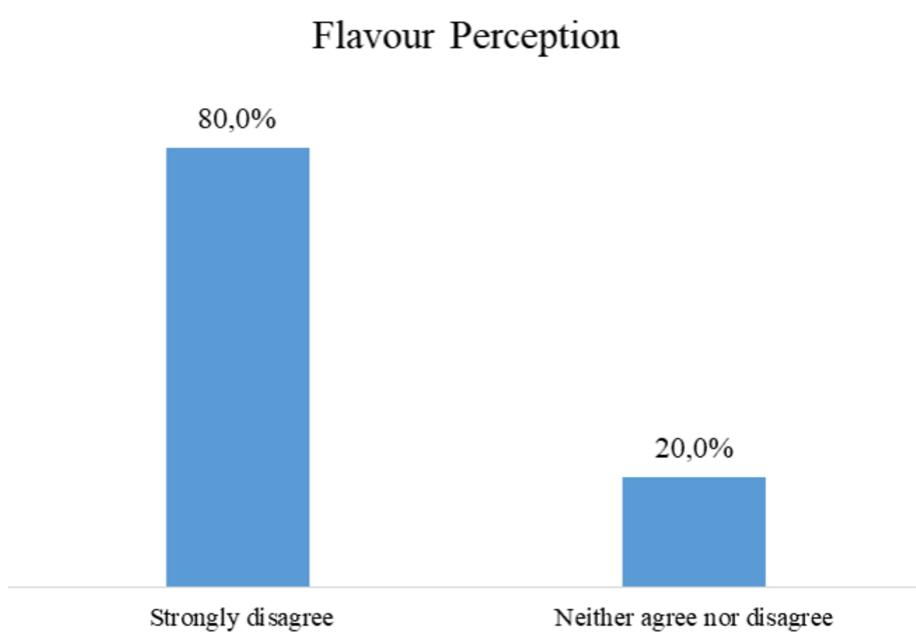

Figure 4.18: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate has worse flavour than industrial chocolate'.

Research Question 7. *Do consumers believe artisanal chocolate has better quality ingredients?*

Respondents strongly associate quality ingredients with artisanal chocolate, being the highest in the table above (mean=4.70; standard deviation=0.483). All respondents selected either "I somewhat agree" or "I strongly agree", as seen in Figure 4.19. Quality of ingredients is key in artisanal chocolate consumption.

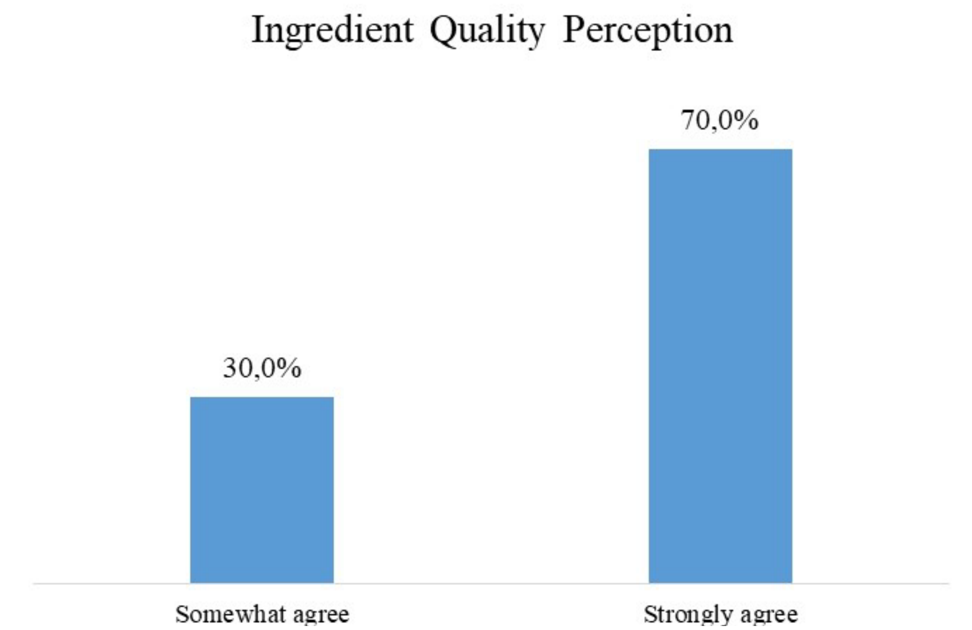

Figure 4.19: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate has higher quality ingredients than industrial chocolate'.

Research Question 8. *Do consumers choose artisanal chocolate due to it being produced in Portugal?*

Portuguese production might have positive or negative effects. The question related with this aspect was posed in a positive way and mentioned helping national economy. This was a decision based on the fact that country-of-origin (which might have a negative impact) would not be as important, since this pool of respondents is composed of consumers, and therefore they do not give importance to this.

The belief that Portuguese brands consumption is positive for the country ranked #7 in the list, meaning respondents do agree with the statement (mean=3.90), but it is not one of the main aspects influencing consumption. Figure 4.20 shows an interesting distribution, in that respondents mostly answered, "I neither agree nor disagree" and "I strongly agree". A possible interpretation for these results would be that respondents either do not associate this concept with artisanal chocolate, or, when they do, they strongly believe the statement.

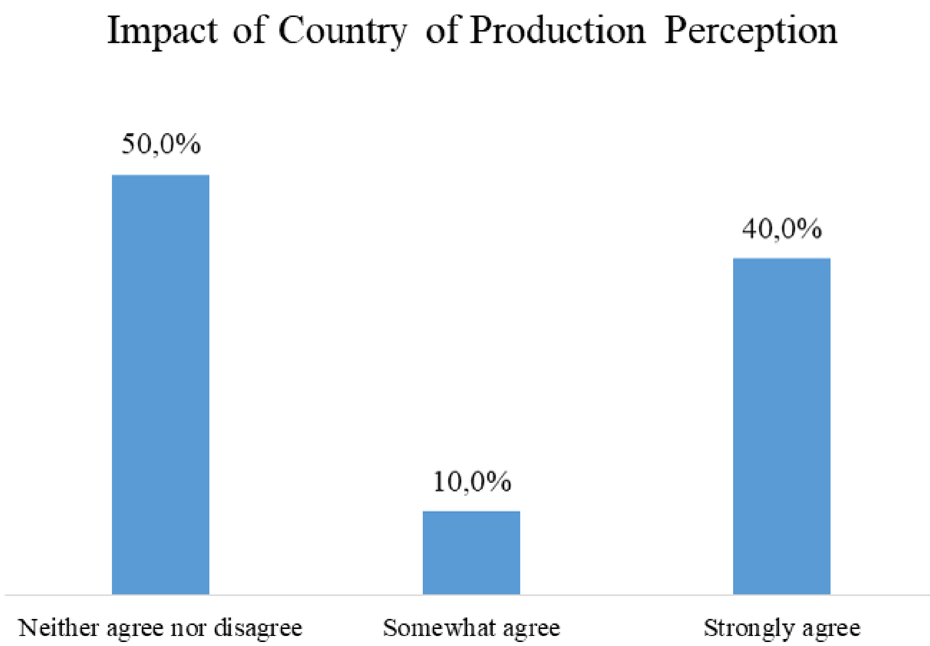

Figure 4.20: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate is better for the country, because it is produced in Portugal'.

Research Question 9. *Do consumers believe artisanal chocolate is a better proxy for showing love?*

Love was analysed under two constructs: "it is a more personal gift" and "it is the result of a labour of love". The combination of these, as mentioned in the literature review, conveys a feeling that industrial chocolate cannot express. Respondents ranked these statements high (#3 and #5 in the list, respectively, with mean=4.30 and mean=4.00, with no respondent answering in disagreement – see Figures 4.21 and 4.22). This allows to conclude that love is in fact a strong driver of the preference for artisanal chocolate.

Research Question 10. *Do consumers experience a sense of community when choosing artisanal chocolate?*

While this statement was not negated, respondents mostly answered with indifference, thus ranking #10 in the list (mean=3.10). Sense of community is therefore not relevant in the consumption of artisanal chocolate. Its distribution can be seen in Figure 4.23.

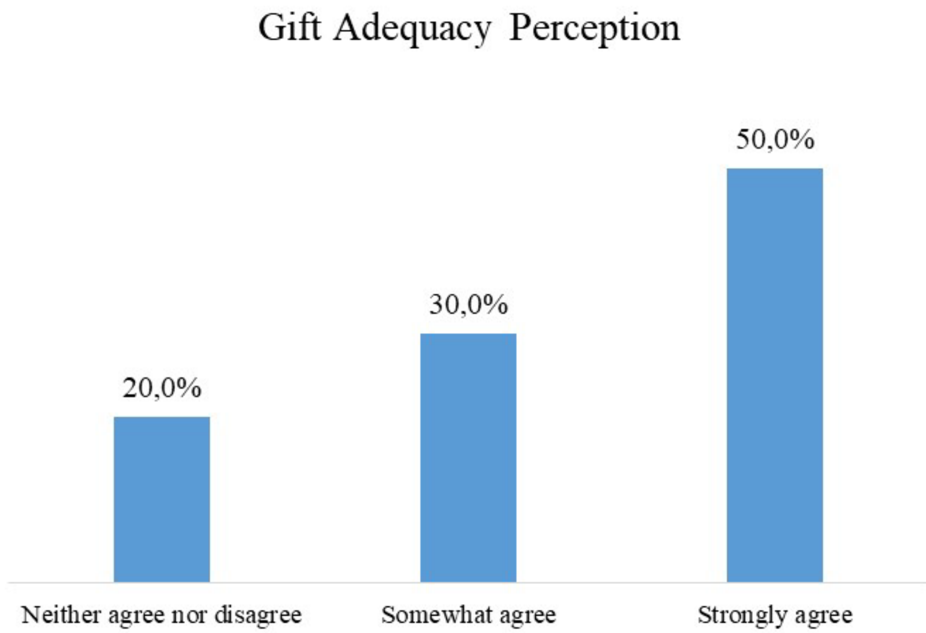

Figure 4.21: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate is more adequate as a present than industrial chocolate'.

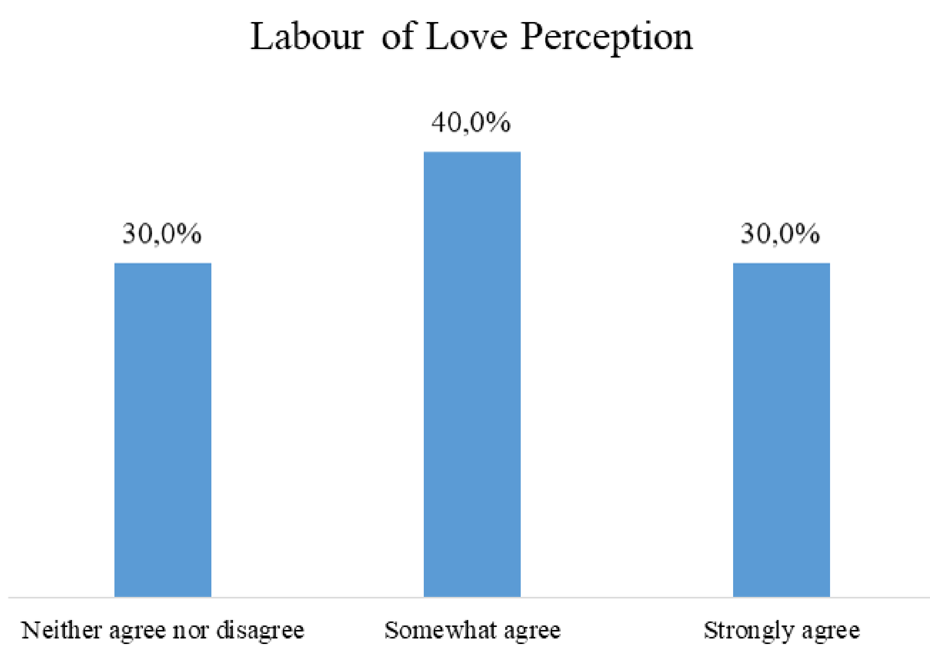

Figure 4.22: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate is the result of a labour of love'.

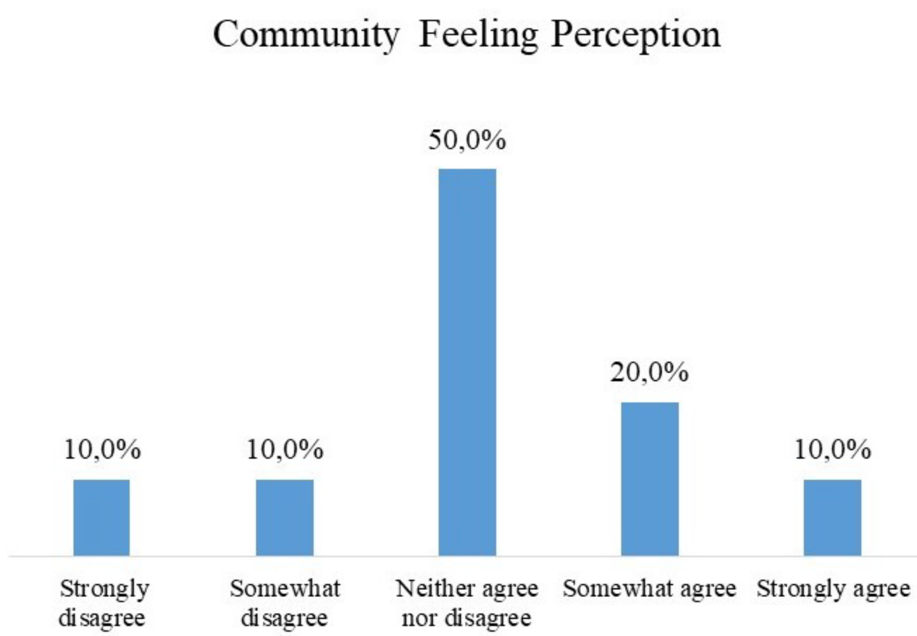

Figure 4.23: Histogram of artisanal consumers’ answers to the statement ‘artisanal chocolate makes me feel like I belong to a community’.

Research Question 11. *What is the perception of artisanal chocolate price?*

Consumers' perception of price positioning is that artisanal chocolate is more expensive than market average. Being listed as #8 on the list, this attribute is not particularly relevant (mean=3.9 and distribution shown in Figure 4.24). More specifically, this attribute is less important in consumers' choice. It follows that they value other characteristics more, and that those characteristics justify the price premium.

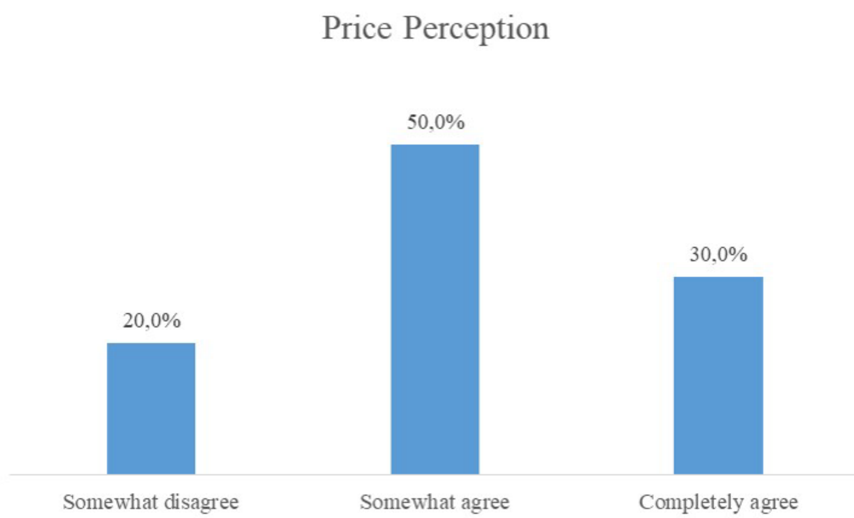

Figure 4.24: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate is more expensive than industrial chocolate'.

Research Question 12. *Do consumers who choose artisanal chocolate have a close relationship with the producer?*

This question relates with the previous one, as they assume a relationship is created due to consuming this product. It is then not surprising that respondents also did not associate artisanal chocolate with producer closeness (statement ranked #11, mean=2.80). The histogram of the distribution of the answers to this statement, however, is quite different from that of Research Question 12. As seen in Figure 4.25, respondents mostly do not identify with the statement, with the remaining showing either a somewhat positive relation, or a strong negative one.

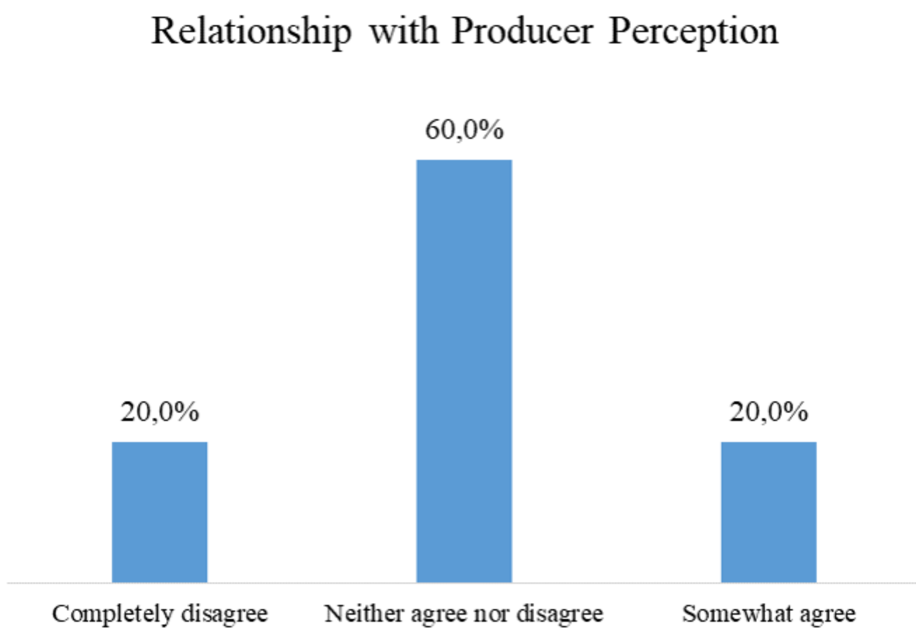

Figure 4.25: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate is produced by people I identify with

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Research Question 13. *Are consumers wary of the hygiene conditions where chocolate is produced?*

Given the fact that respondents are consumers of the product, this question might seem counterintuitive, since being wary of hygienic conditions ought to prevent consumption. This was posed in a negative way, to check for respondent attention. Respondents, on average, answered negatively (mean=2.40, ranking #13), with only one positive answer, as shown in Figure 4.26.

Research Question 14. *Do consumers believe artisanal chocolate is fairer for farmers?*

This research question concerns the fairtrade segment of the literature analysis. This was the fifth highest statement in terms of average agreement (mean=4.00), sharing the spot with "being a result of a labour of love". Fairtrade is therefore strongly associated with artisanal chocolate, and respondents do not have a feeling of indifference towards the topic, as seen in Figure 4.27.

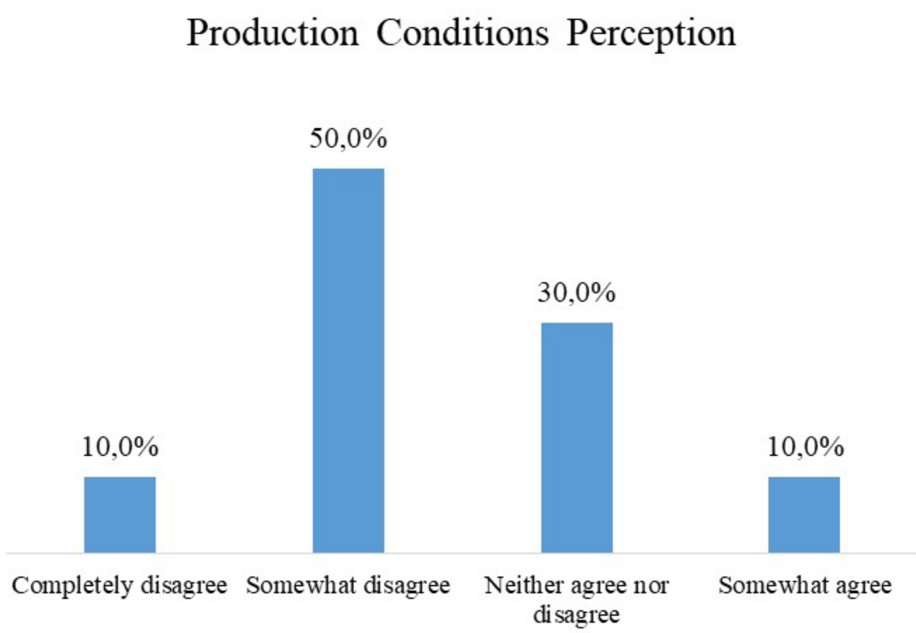

Figure 4.26: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate is produced in non-controlled hygienic conditions'.

Research Question 15. *Do consumers believe artisanal chocolate is unique?*

Finally, uniqueness was measured along the packaging and ingredient combination strands. Both statements enjoy positive results: "has original ingredient combinations" with a mean of 4.10 and "has more original packaging" with a mean of 3.80, meaning they ranked # 4 and #8 in the list. Respondents give particular importance to ingredient combination, as shown in Figures 4.28 and 4.29.

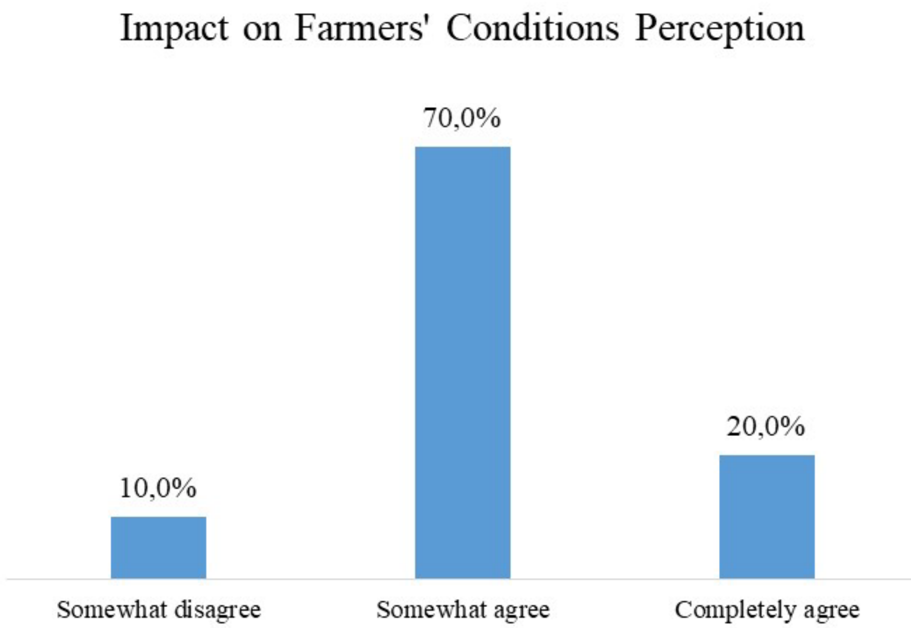

Figure 4.27: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate promotes better conditions for cocoa producers'.

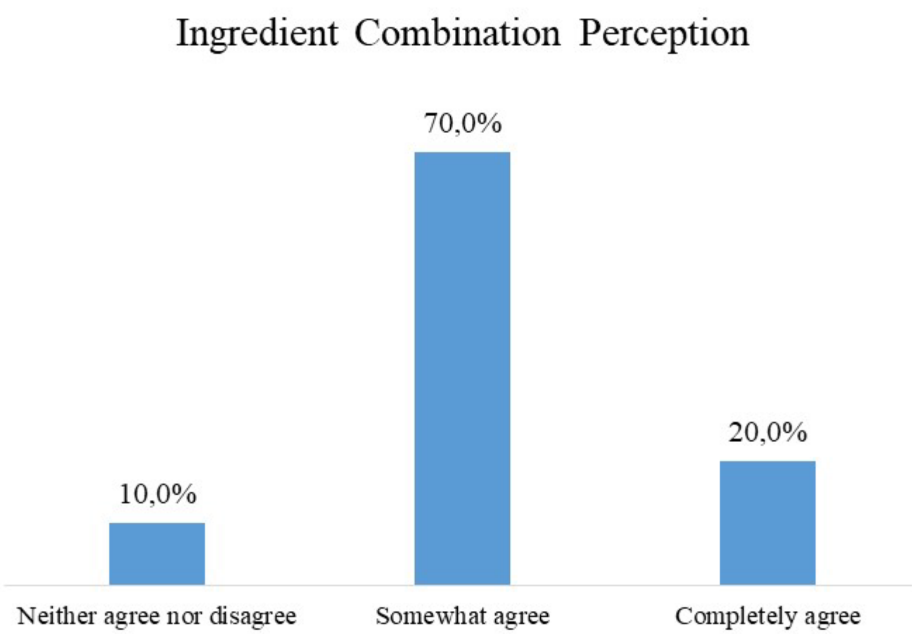

Figure 4.28: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate has more original ingredient combinations'.

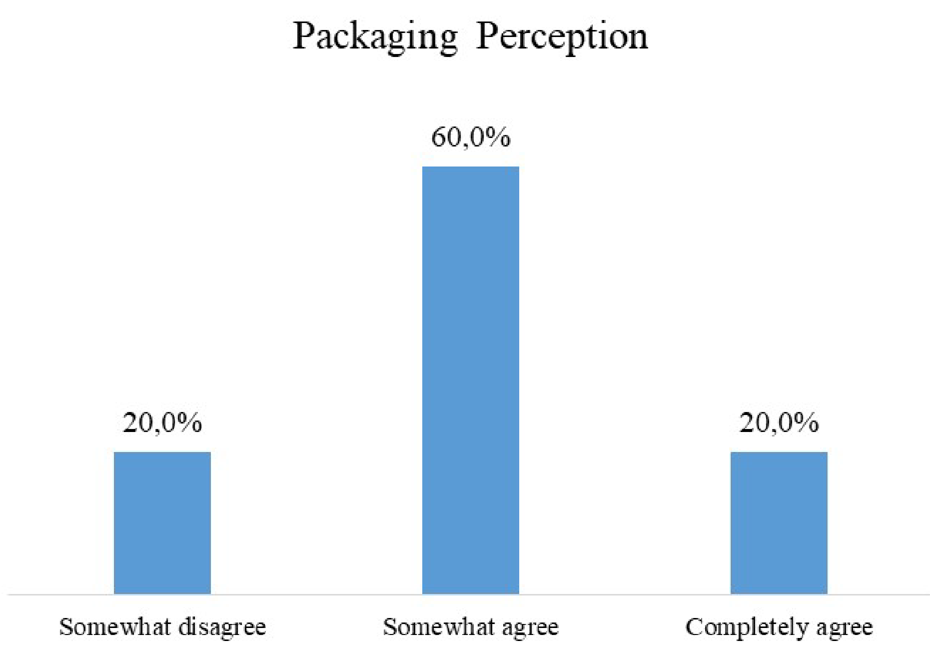

Figure 4.29: Histogram of artisanal consumers' answers to the statement 'artisanal chocolate has more original packaging.'

4.4.2 The non-consumers of artisanal chocolate

An initial assessment of non-consumers of artisanal chocolate (i.e., that consume other types of chocolate) suggested a further division into two groups, according to the type of brands usually preferred. This was based on the vast differences that can be found in-brands and across brands, especially at price-points, which ultimately represent an important attribute in consumer choice, as seen in the qualitative interviews.

The two groups were to be divided by knowing which brands each respondent usually consumes ("Which of the following brands do you usually consume? Select all that apply"), with Column 1 showing average-priced, both international and Portuguese brands, and Column 2 showing premium brands, also international and Portuguese. However, the results obtained were not significant, as a low number of respondents classified as being premium (premium consumers would choose mostly Column 2 brands – only 5 of 107 non-artisanal consumers met this condition.). Given these results, the division was not performed, and non-consumers were analysed as a whole.

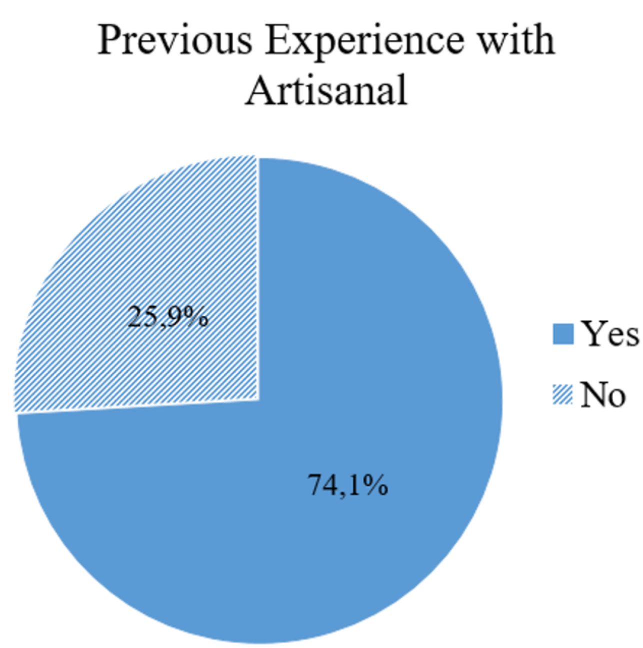

Figure 4.30: Pie chart of non-artisanal consumers' previous experience with artisanal chocolate.

Research Question 16. *Have non-consumers tried artisanal chocolate?*

This first research question regarding specifically non-consumers aims to give context to the answers that follow. 74.1% (figure 4.29) of respondents of this group stated to have tried artisanal chocolate before, which is a positive result, as it means respondents have some knowledge of the product.

Research Question 17. *Are non-consumers willing to try artisanal chocolate?*

Willingness-to-try is an important measure, as it influences the size of the potential market – when people are definitely not interested in trying, the potential market is smaller. Only respondents who answered negatively in the previous question were inquired about willingness-to-try. As seen on figure 4.30, 14.3% respondents (which amounts to approximately 3.7% of all respondents of this survey) are definitely not interested in trying, while 57.1% (approximately 14.8% of total sample) expressed some interest. The remaining respondents (7.4% of total sample) also expressed some interest, on the condition that this was without charge.

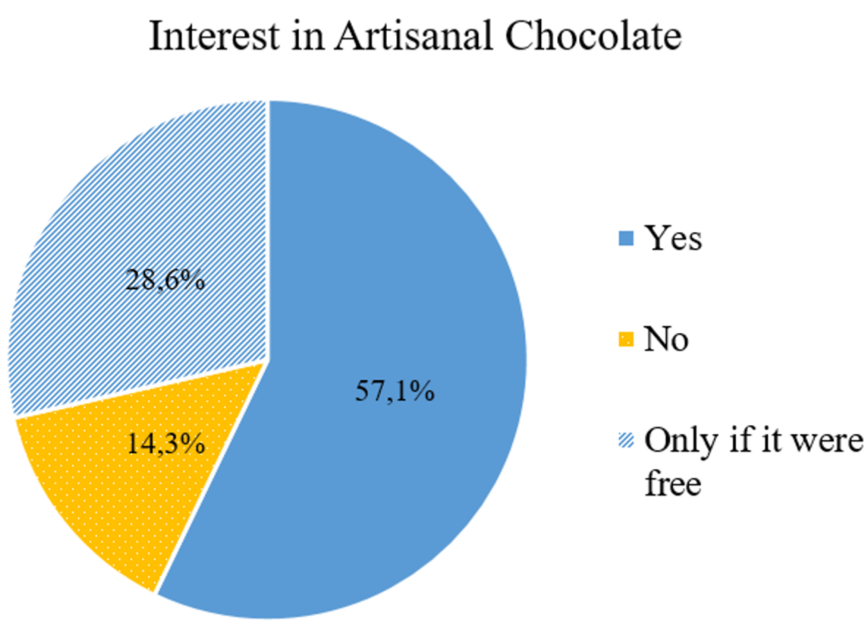

Figure 4.31: Pie chart of non-artisanal consumers' interest in trying artisanal chocolate.

Research Question 18. *Do non-consumers shop online?*

Given the strong presence of artisanal chocolate brands in e-commerce, it is important to know about non-consumers habits, without it being an extensive research, as it fell outside the scope of this project. Portuguese online shopping habits are little developed when compared with other countries, as figure 4.31 illustrates. Only 11.1% of non-consumers shop online, including food. While this is a poor result for brands that depend on online channels, it is relevant to highlight that younger consumers are more adept of online shopping, and that the habit is becoming more accepted among general population. This means potential online market is increasing.

Table 4.8 shows the mean and standard deviation of the answers of non-artisanal consumers to the Likert-scaled statements, which were classified from 1 to 5, in a descending order of mean. On a first note, it is interesting to highlight that standard deviations vary in the [0.841; 1.067] interval, meaning the values are close across statements. Regarding the mean, this value is used as a proxy to what the pool of respondents finds to be more related with artisanal chocolate.

Figure 4.32: Pie chart of non-artisanal consumers' online shopping habits.

Table 4.8: Mean and standard deviation of answers of non-artisanal consumers, by descending order of mean.

		Non-Artisanal Consumers	
	Question	**Mean**	**Std. Dev.**
1	"is more expensive"	4.15	0.888
2	"is harder to find for sale"	3.97	0.841
3	"has ingredients combinations that are more original"	3.92	0.902
4	"has ingredients of higher quality"	3.79	0.898
5	"has more interesting packaging"	3.78	0.974
6	"is more adequate as a gift"	3.77	0.937
7	"is the result of a labour of love"	3.55	0.934
8	"is healthier"	3.50	1.040
9	"has higher cocoa percentages"	3.46	0.914
10	"promotes better conditions for farmers"	3.32	0.897
11	"has less sugar"	2.99	0.976
12	"is less controlled by food safety authorities"	2.49	1.067
13	"is for people different than me"	2.45	1.030
14	"is produced in Portugal, which makes me wary"	1.73	1.051

Research Question 19. *Do non-consumers believe artisanal chocolate is healthier?*

Healthiness of artisanal chocolate was present in three different statements: a first one that directly inquired customers, and two others, that focused on cocoa percentages and sugar content. The results obtained, further illustrated in Figures 4.33, 4.34 and 4.35, allow inferring that healthiness and its different aspects, are not strongly related with artisanal chocolate (ranking #8, #9 and #11).

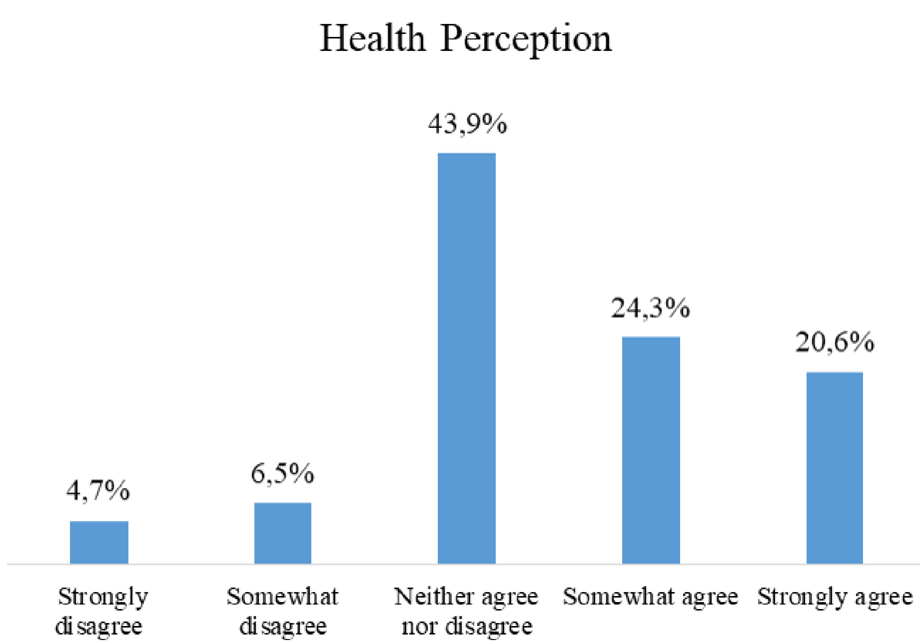

Figure 4.33: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate is healthier'.

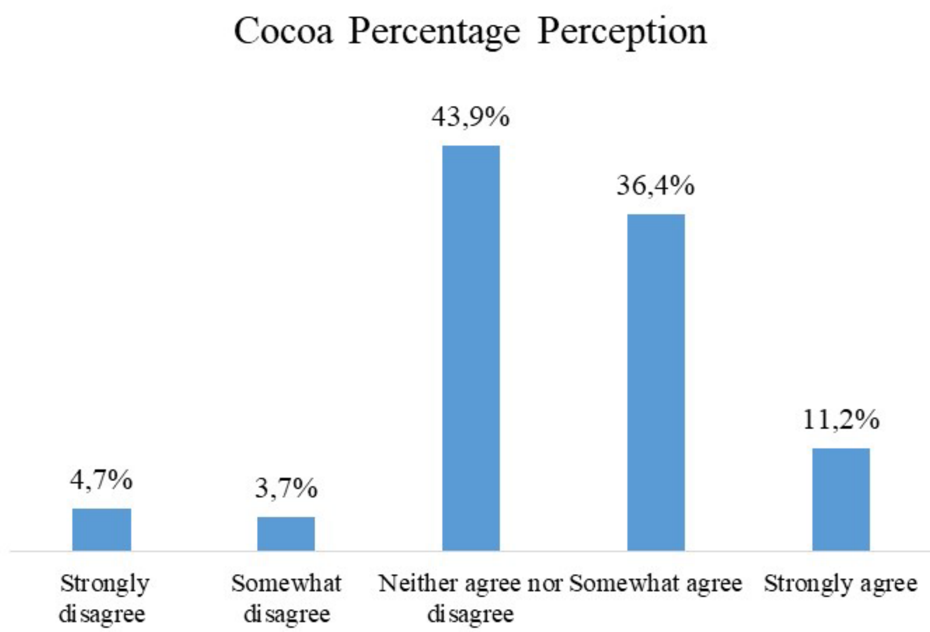

Figure 4.34: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate has higher cocoa percentages'.

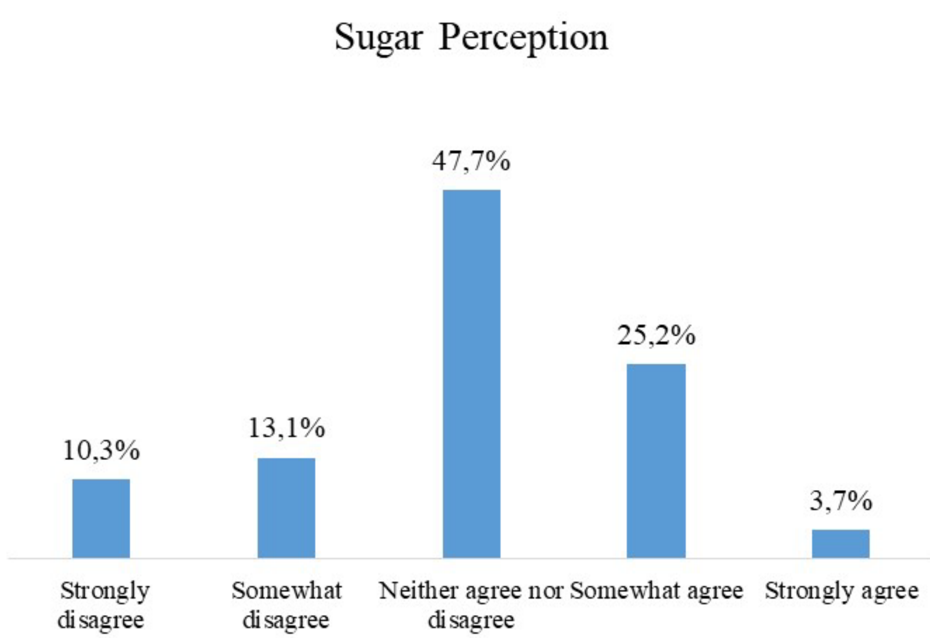

Figure 4.35: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate has less sugar'.

Research Question 20. *What is the perception of artisanal chocolate price?*

Price rated highest on the list obtained, with a 4.15 mean and the distribution illustrated in the histogram in Figure 4.36. This was expected, as this attribute weighs heavily in most purchasing decisions made by consumers. As will be discussed in chapter 5, one of the challenges faced by brands is presenting the benefits of artisanal chocolate as justifying the price premium associated.

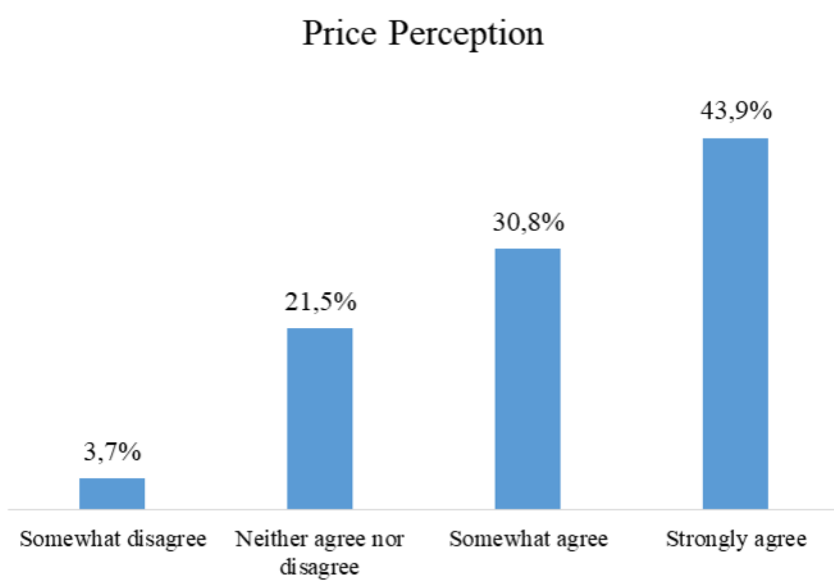

Figure 4. 36: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate is more expensive'.

Research Question 21. *Do non-consumers believe gifting artisanal chocolate is a way of showing love?*

Price rated highest on the list obtained, with a 4.15 mean and the distribution illustrated in the histogram in Figure 4.36. This was expected, as this attribute weighs heavily in most purchasing decisions made by consumers. As will be discussed in chapter 5, one of the challenges faced by brands is presenting the benefits of artisanal chocolate as justifying the price premium associated.

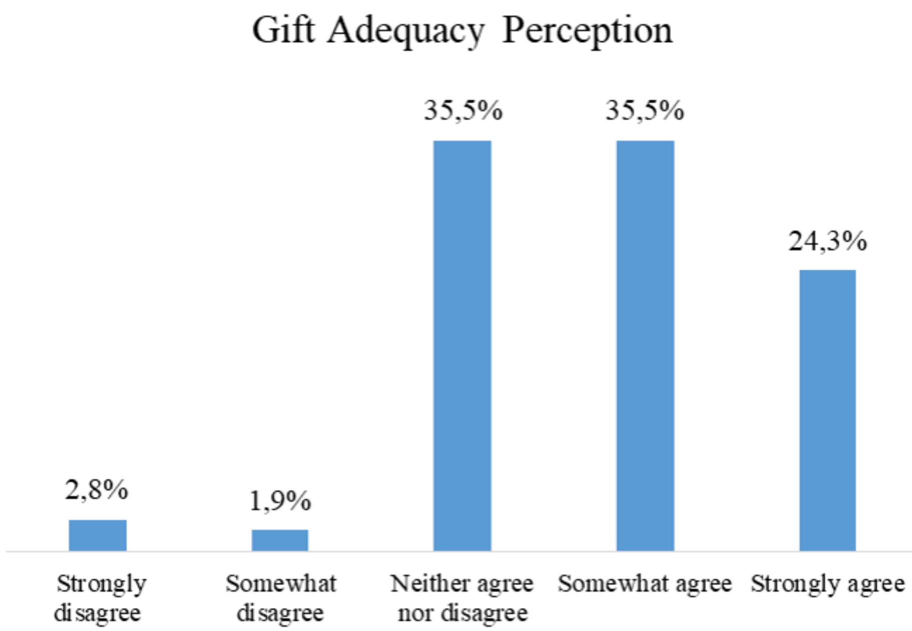

Figure 4.37: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate is more adequate as a gift'.

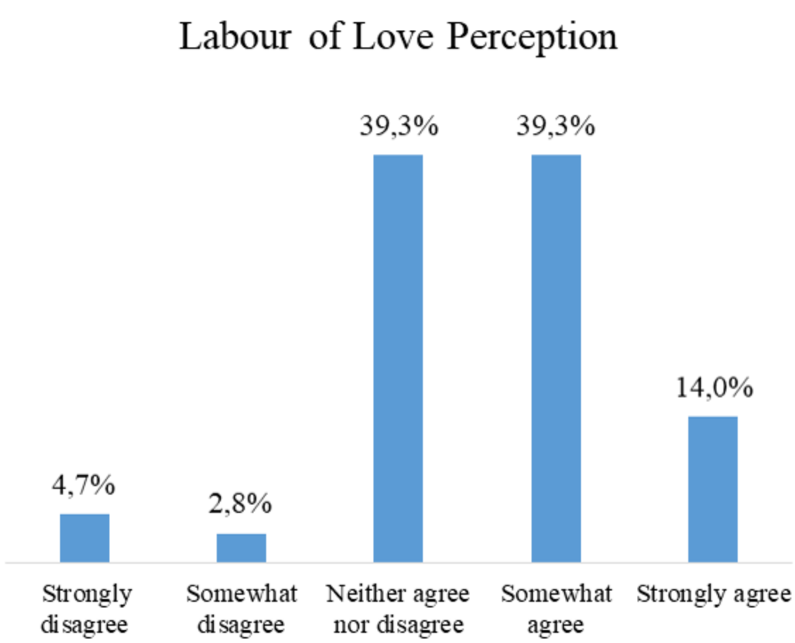

Figure 4.38: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate is the result of a labour of love'.

Research Question 22. *Do non-consumers artisanal chocolate has better quality ingredients?*

Ingredient quality is rated # 4 according to the obtained mean (3.79), implying non-consumers perceive artisanal chocolate as having better ingredients than the chocolate usually consumed. As can be seen in the Figure 4.39, this association is quite strong, with about 70% of respondents answering "I somewhat agree" or "I strongly agree".

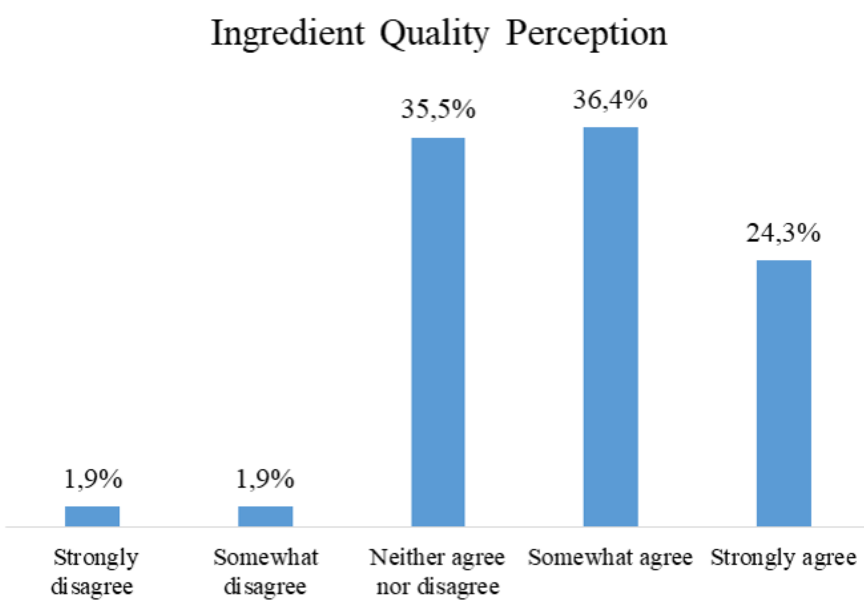

Figure 4.39: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate has ingredients of higher quality'.

Research Question 23. *Do non-consumers believe artisanal chocolate has less quality because it is produced in Portugal?*

Although country-of-origin can be an important aspect that influences consumption, the results in this study show that Portuguese manufacturing is the least concern of non-consumers. In fact, this is consistent considering the fact that ingredient quality is heavily associated with artisanal chocolate, as seen above. The reasoning behind this might relate to the population used – since Portuguese people were asked about Portuguese production, part of the country-of-origin effect might have dissipated. The results are illustrated in Figure 4.40. Respondents mostly answered "I strongly disagree" with the statement, followed by "I neither agree nor disagree", in what is a positive result for Portuguese artisanal chocolate brands.

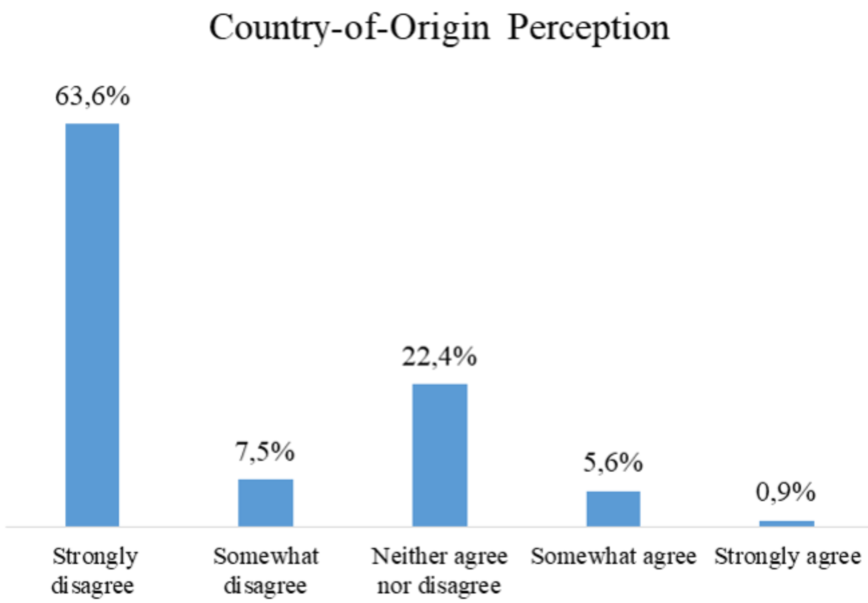

Figure 4.40: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate is produced in Portugal, which makes me wary'.

Research Question 24. *Do non-consumers believe artisanal chocolate is fairer for farmers?*

The impact on living conditions of cocoa producers by artisanal chocolate – the fairtrade initiative mentioned in the literature review – ranked # 10 in the 14-item list. A mean of 3.32 implies a lack of association – further supported by Figure 4.41 - to artisanal chocolate by respondents in this matter, and it is possible to conclude that, on average, it is a fairly irrelevant attribute when choosing chocolate.

Research Question 25. *Are non-consumers wary of the hygiene conditions on which artisanal chocolate is produced?*

Poor hygiene conditions are the result of a lack of oversight of production standards by food safety authorities, and therefore that was the question posed. It ranked #12, thus being one of the least associated with artisanal chocolate, which is a positive outcome for brands. However, a deeper analysis into the histogram in Figure 4.42 shows that some respondents (approximately 15%) chose "I somewhat agree". While it still maintains the conclusion that this need not be a main concern for brands, it might suggest that some respondents still are unsure of the production conditions of artisanal chocolate.

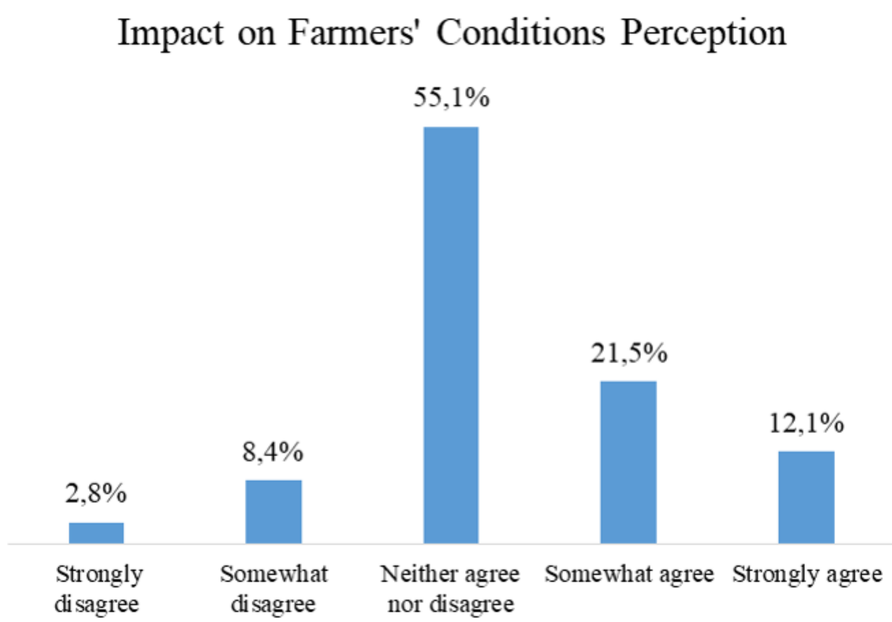

Figure 4.41: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate promotes better conditions for cocoa farmers'.

Research Question 26. *What is these consumers' perception of the target market of artisanal chocolate?*

Brand managers must take action into defining their target markets, and it is therefore important to understand if the results obtained in this questionnaire are the perceptions of consumers that are not part of that target. This statement poses the question the other way around – do these respondents not consume chocolate because they do not identify with the target market the brands are trying to reach? This need not be a concern for brands, as this statement ranked # 13, thus being one of the least associated with artisanal chocolate. In other words, it is not because of alienation that these respondents are not consuming artisanal chocolate. However, and as can be interpreted from Figure 4.43, most respondents answered this question with "Neither agree nor disagree", which might suggest that they are not sure of the target market of such brands, which are consequently lacking proper communication with potential consumers.

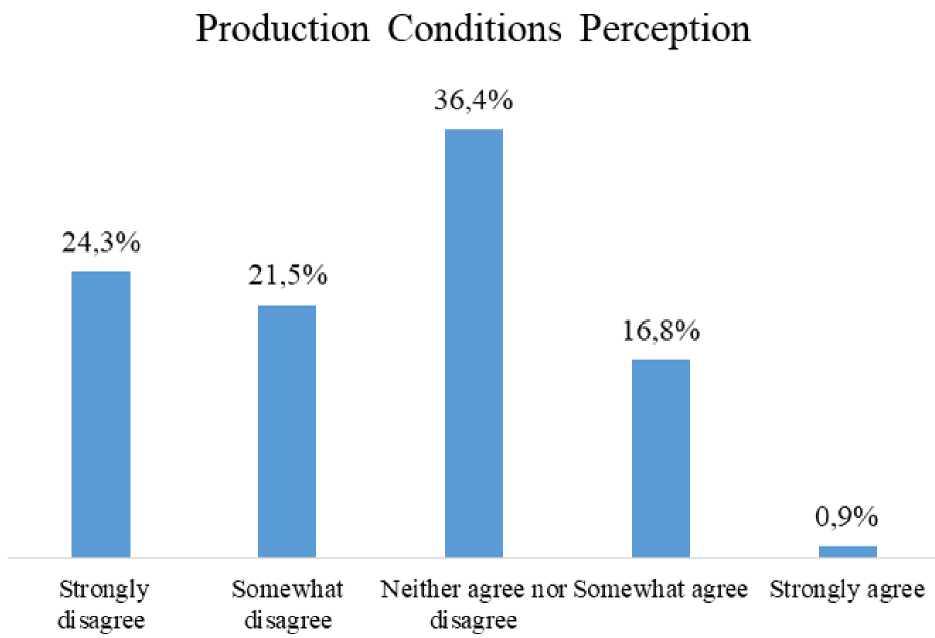

Figure 4.42: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate is less controlled by food safety authorities'.

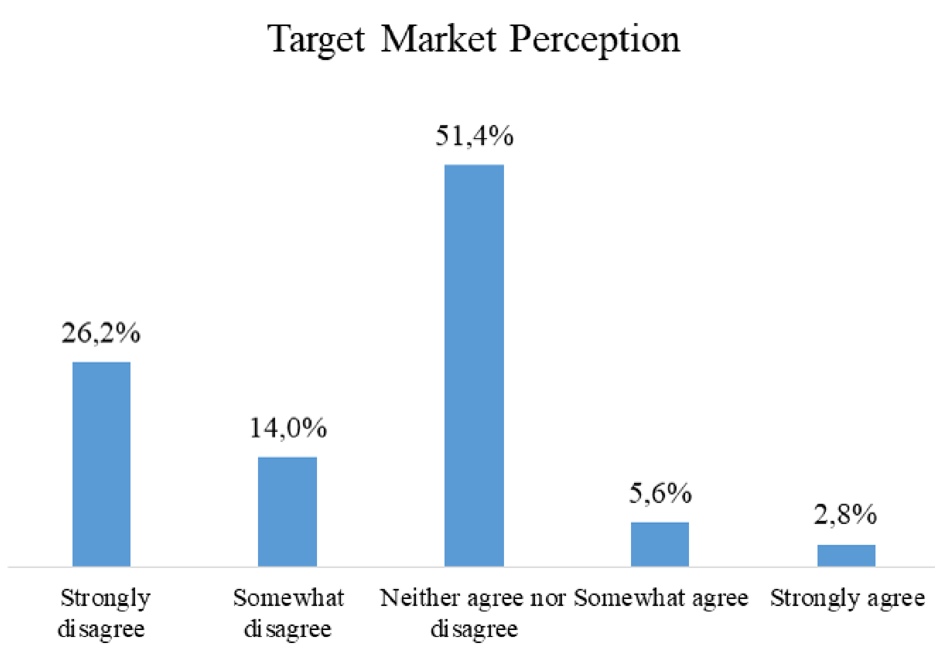

Figure 4.43: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate is more adequate for people different than me'.

Research Question 27. *What is the perception of non-consumers of availability of artisanal chocolate?*

Availability of artisanal chocolate ("is harder to find for sale") scored the second highest value of mean and the lowest of standard deviation, which implies respondents agree this to be a common characteristic of artisanal chocolate – distribution is found in Figure 4.44. This result can possibly stem from two reasons. One, respondents are not aware of online availability, which most brands offer nationwide. Two, respondents are not willing to buy online, as Research Question 17 showed. Brand actions to improve in this aspect depend strongly on both desired positioning and financial capabilities of brands – this means that perhaps brands wish to retain a solely brick-and-mortar store, as part of the imagery, or that brands are not capable of owning physical stores and the costs incurred. Either way, this result shows that communicating more effectively the national delivery possibilities is important to the future success of brands, as online shopping becomes more widely accepted.

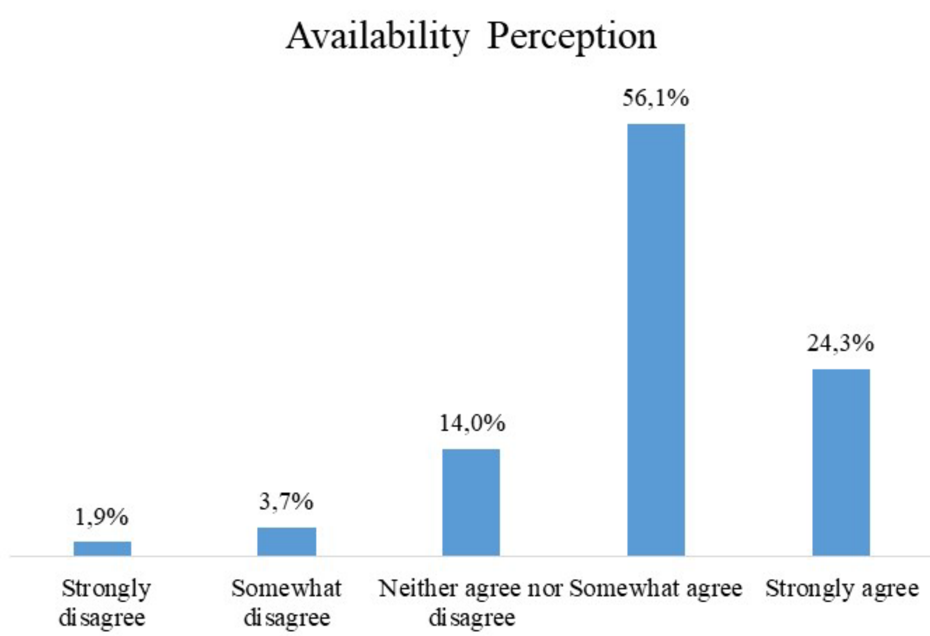

Figure 4.44: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate is harder to find for sale'.

Research Question 28. *What is the perception of non-consumers of the uniqueness of artisanal chocolate?*

As mentioned in the literature review, uniqueness was evaluated in two aspects: ingredient combinations and packaging. These ranked # 3 and # 5 (mean of 3.92 and 3.78, respectively, and with similar distributions, as the histograms in Figures 4.45 and 4.46 show), which implies that respondents find artisanal chocolate unique, in these terms. Uniqueness can be a valuable driver for brands, as it allows to charge a premium. It also closely relates with availability – unique products are usually harder to obtain, and thus this requires brand managers to maintain a delicate balance.

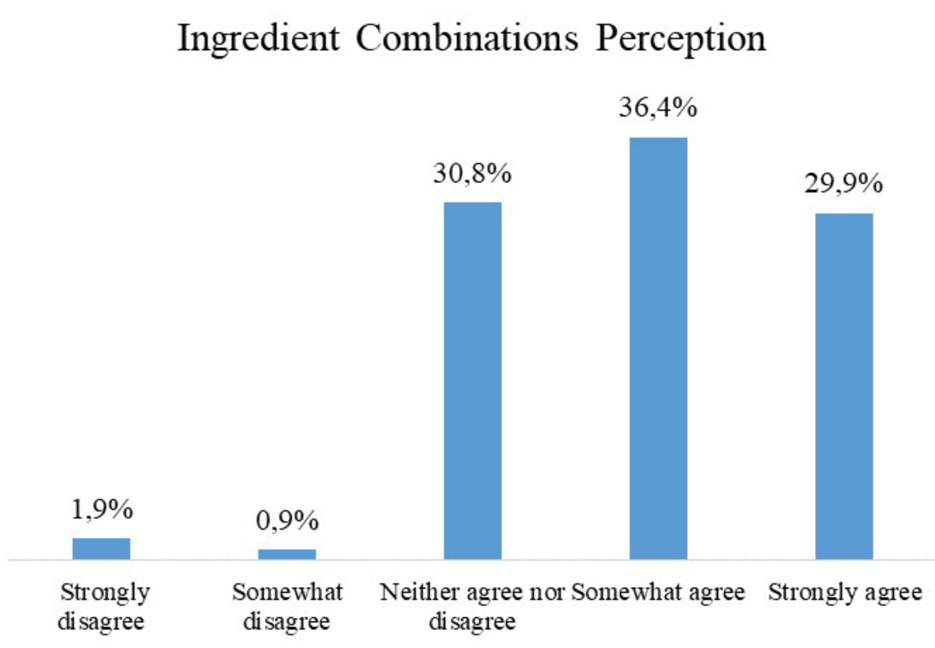

Figure 4.45: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate's ingredient combinations are more original'.

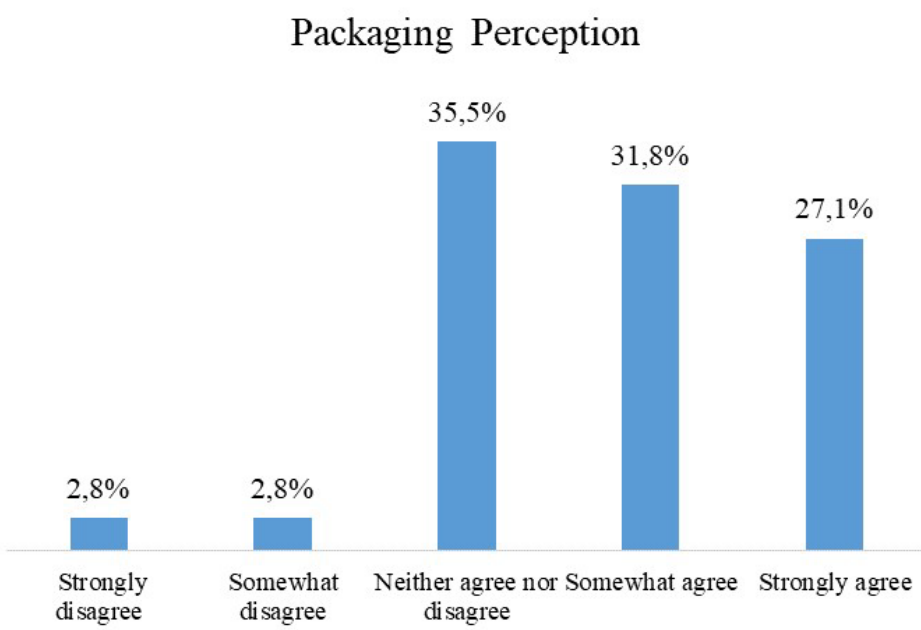

Figure 4.46: Histogram of non-artisanal consumers' answers to the statement 'artisanal chocolate's packaging is more original'.

4.4.3 Comparison of consumers and non-consumers

Table 4.9 compares the results obtained for each type of consumer. It is possible to conclude that both groups share a similar hierarchy of imagery associated to artisanal chocolate. In fact, the difference lies in that consumers rank Quality first, Health second and Uniqueness fourth, while non-consumers rank Uniqueness over Quality, over Health. Overall, both consumer types perceive artisanal chocolate as being a quality, healthy and unique product. However, this hierarchy is established solely among similar constructs. If the remaining are included, the top statements of non-consumers are now Price and Availability. The two types of consumer now differ in perception, as non-consumers essentially do not recognize the justification for the price premium.

It is possible to relate this with the previous insight. A high-price, hard-to-find item might be perceived as unique – which is further suggested by the interviews -, or for "special occasions". Those that consume artisanal chocolate weigh Uniqueness lower, because they do not necessarily save it for such occasions.

Table 4.9: Comparison of hierarchy of attributes between consumers and non-consumers.

Consumers		**Non-Consumers**	
		1	Price
		2	Availability
1	Quality	1	Uniqueness
2	Health	2	Quality
3	Love	3	Love
4	Uniqueness	4	Health
5	Fairtrade	5	Fairtrade
6	Safety	6	Safety
7	National Production	7	National Production

Chapter 5.

Conclusions and Final Remarks

5.1. Conclusions

Artisanal chocolate is perceived as a unique, healthy product of high quality that conveys love. This perception drives a price premium, and the product can enjoy a more-for-more positioning. The market penetration in Portugal is lower than in other countries, due to both the lower consumption per capita and younger brands. The expected increase in consumption means brands have an opportunity to acquire consumers. Although the market is not saturated, as shown by the positioning map, it is important to define a strategy that will overcome potential obstacles to achieving sustainable growth.

A first challenge for brands is to increase awareness. As the example of Pedaços de Cacau shows, presence in events has created higher awareness for the brand, even if it is for non-consumers. Frequent interaction through online platforms and in events will drive the brand higher in consumers and potential consumers' minds.

A second challenge has to do with conversion of consumers. This relates with adjusting non-consumers' perceptions of the product. As seen previously, this group is not against trying the product. However, price and availability might discourage consumption. To convert these potential consumers, brands must act two-fold: on the one hand, by highlighting the online shopping capabilities most possess. On the other hand, by emphasizing other features (such as quality and health) that drive the price premium. Additionally, the experience of consuming artisanal chocolate (in-store) is another feature brands can accentuate.

Finally, the lack of online shopping habits is an obstacle for the growth of artisanal brands. Although this is becoming less of a concern, brands can take actions to stimulate online shopping. Given the sensitivity to price and promotions of the Portuguese consumers, initiatives that favour online shopping (e.g. online promotion, referrals programmes, free delivery, order tracking) can positively impact the acquisition of new consumers.

5.2. Limitations and further research

The main limitation of this study lies in the number of respondents in the quantitative sample. Not only it was biased to people living in the Center, it was also small, and therefore the results might lack strength. A higher number of respondents could have also allowed for non-consumer segmentation in premium and non-premium, potentially providing more insights.

A second point has to do with the choice to exclude consumers' perception of availability. The reasoning was that this group consumes the product, which means they do not have availability issues. Looking back, this attribute should have been included, as it would allow to compare with non-consumers, and it might have provided insights on possible improvements.

Additionally, this study would have benefited from a deeper of qualitative data collection, namely in the shape of a focus group.

Further research in the topics of artisanal chocolate and the Portuguese chocolate consumer will help build the literature. They can potentially attend to the consumer experience (i.e. the customer journey), and benchmarking of foreign brands to unveil future strategies for the brands. Both were outside the scope of this thesis.

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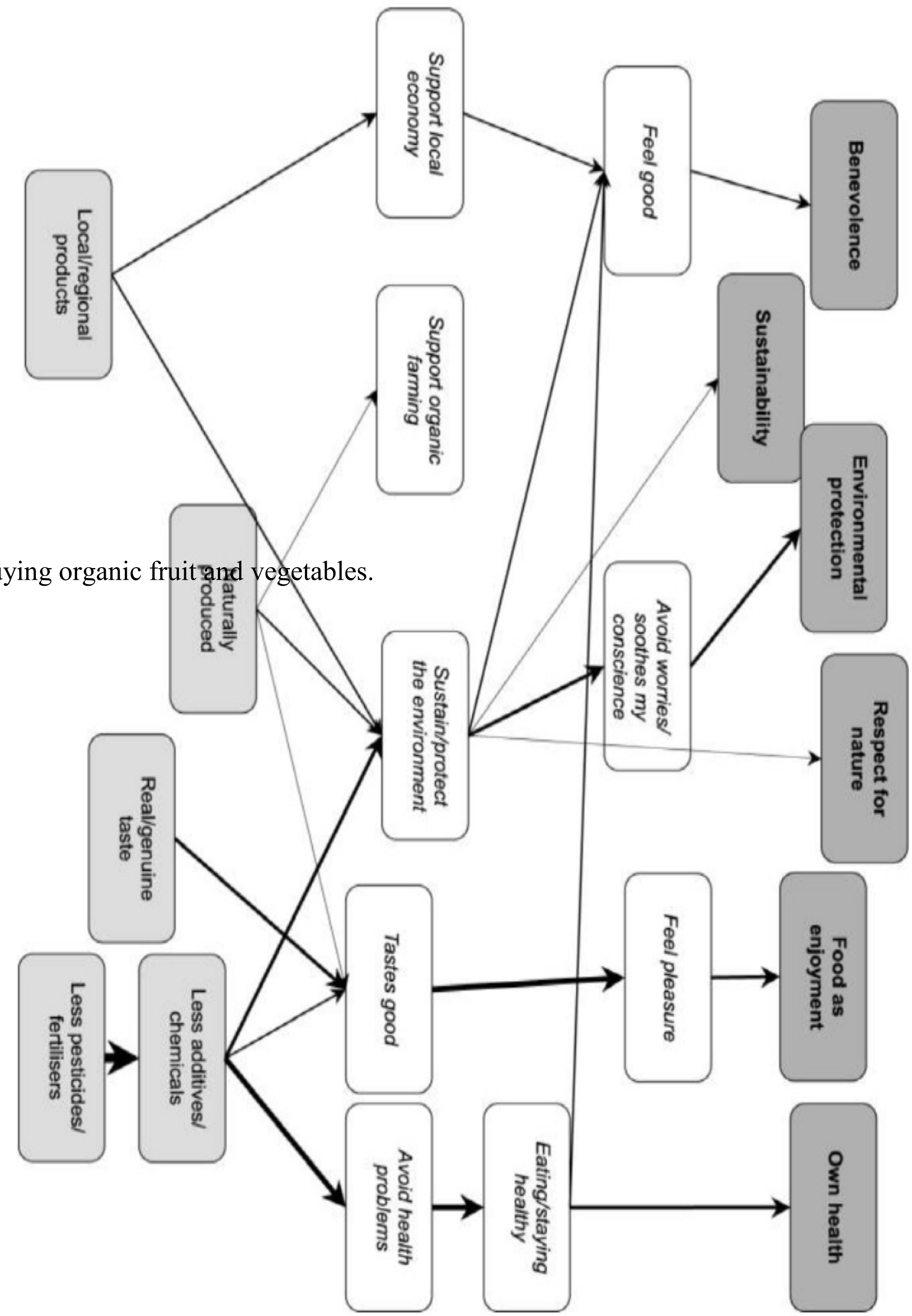
Appendix A

The ‘Organic’ Concept



tructure of motivations for buying organic fruit and vegetables.
er (2005).

Appendix B

Survey Questions – The Artisanal Chocolate Consumer

Start of Block: Apresentação

Caro/a participante,

O seguinte questionário destina-se à realização da dissertação de mestrado em Gestão e Marketing Estratégico na Católica-Lisbon School of Business and Economics. As suas respostas são fundamentais para o sucesso desta dissertação, pelo que desde já agradeço o tempo disponibilizado, que será cerca de 4 minutos. Os dados recolhidos serão tratados de forma estritamente anónima e confidencial, sendo apenas utilizados de forma agregada para fins do referido estudo. Não existem respostas certas ou erradas, pelo que lhe peço que seja o mais sincero(a) possível.

Este inquérito pretende analisar o consumo de chocolate, focando-se especificamente em chocolate em formato tablete/barra (ver imagem). Em caso de qualquer dúvida, por favor contacte-me através do seguinte e-mail: margaridacmcm@gmail.com

Start of Block: Apresentação

Survey Question 1. Selecione a sua nacionalidade

- Portuguesa
- Outra

Skip To: End of Survey If Selecione a sua nacionalidade = Outra

Start of Block: Demografia

Survey Question 2. Qual a sua idade?

- Menos de 18 anos
- 18 - 25 anos
- 26 - 35 anos
- 36 - 55 anos
- Acima de 55 anos

Survey Question 3. Qual o seu género?

- Feminino
- Masculino
- Prefiro não revelar

Survey Question 4. Qual o nível mais elevado de estudos que concluiu?

- Ensino Secundário
- Licenciatura
- Mestrado
- Doutoramento
- Outro

Survey Question 5. Qual das seguintes opções corresponde à sua situação profissional?

- Desempregado
- Empregado
- Estudante
- Trabalhador-estudante
- Reformado

Survey Question 6. Qual a sua área de residência?

- Norte
- Centro
- Área metropolitana de Lisboa
- Alentejo
- Algarve
- Madeira
- Açores

Start of Block: O Consumo de Chocolate

Este inquérito pretende analisar o consumo de chocolate, focando-se especificamente em chocolate em formato tablete/barra (ver imagem).

Survey Question 7. Com que frequência aproximada consome chocolate?

- Mais do que duas vezes por semana
- Uma a duas vezes por semana
- Duas a três vezes por mês
- Uma vez por mês
- Não sou consumidor de chocolate

Skip To: End of Survey If Com que frequência consome chocolate? = Não sou consumidor de chocolate

Survey Question 8. Qual a finalidade das suas compras de chocolate?

- Mais vezes para consumo próprio do que para oferta
- Mais vezes para oferta do que para consumo próprio
- Tanto para oferta como para consumo próprio
- Apenas para oferta
- Apenas para consumo próprio

Survey Question 9. Qual o valor médio aproximado de cada compra de chocolate para **consumo próprio**?

- Menos de 2€
- De 2€ a 4,99€
- De 5€ a 9,99€
- De 10€ a 20€
- Mais de 20€

Display this question if Qual a finalidade das suas compras de chocolate? Apenas para consumo próprio is not selected

Survey Question 10. Qual o valor médio aproximado de cada compra de chocolate para **oferta**?

- Menos de 2€
- De 2€ a 4,99€
- De 5€ a 9,99€
- De 10€ a 20€
- Mais de 20€

Survey Question 11. Das seguintes marcas, selecione aquelas com que está familiarizado.

- Arcádia - Casa do Chocolate
- Chocolataria Equador
- Chocolateria Delícia
- Pedaços de Cacau
- Bocasuja
- Chocolate com Pimenta
- Cacao diVine
- Feitoria do Cacau
- Theo Kakaw
- Maria Chocolate

- Denegro
- Nenhuma das anteriores

Survey Question 12. Indique o nível em que se identifica com cada uma das seguintes afirmações, em que 1 - Não me identifico de todo e 5 - Identifico-me completamente.

- Gosto de experimentar diferentes marcas de chocolate [1-5]
- Procuro variedade no tipo de chocolate que consumo [1-5]
- Prefiro chocolate artesanal a industrial [1-5]
- Considero-me um consumidor de chocolate artesanal [1-5]

Branch: if Considero-me um consumidor de chocolate artesanal [4] or Considero-me um consumidor de chocolate artesanal [5] is selected then display Block: O Consumidor de Chocolate Artesanal; if Considero-me um consumidor de chocolate artesanal [1] or Considero-me um consumidor de chocolate artesanal [2] or Considero-me um consumidor de chocolate artesanal [3] is selected then display Block: O Consumidor de Chocolate Artesanal

Start of Block: O Consumidor de Chocolate

Survey Question 13. Quais das seguintes marcas costuma consumir? Selecione todas as que se aplicam

- Nestlé
- Milka
- Ferrero
- Regina
- Kinder
- Godiva
- Leonidas
- Neuhaus
- Jubileu
- Outra. Por favor especifique

Survey Question 14. Costuma fazer compras online?

- Sim, mas não de produtos alimentares
- Sim, incluindo produtos alimentares
- Não

Survey Question 15. Alguma vez experimentou chocolate artesanal?

- Sim
- Não

Display this question if Alguma vez experimentou chocolate artesanal? Não is selected

Survey Question 16. Estaria interessado em experimentar chocolate artesanal?

- Sim
- Não
- Apenas se fosse de forma gratuita

Survey Question 17. As seguintes afirmações têm como objetivo avaliar a sua opinião sobre chocolate artesanal. Para cada uma, selecione o seu nível de concordância.

Em comparação com o chocolate que costumo consumir, o chocolate artesanal...

- ...é mais saudável [1-5]
- ...é mais caro [1-5]
- ...é mais adequado enquanto presente [1-5]
- ...tem ingredientes de melhor qualidade [1-5]
- ...é produzido em Portugal, o que me causa desconfiança [1-5]
- ...promove melhores condições para os produtores de cacau [1-5]
- ...é menos controlado por autoridades de segurança alimentar [1-5]
- ...é produto de um trabalho de amor [1-5]
- ...tem menos açúcar [1-5]
- ...é mais adequado para pessoas diferentes de mim [1-5]

- ...é mais difícil de encontrar à venda [1-5]
- ...tem maior percentagem de cacau [1-5]
- ...tem embalagens mais interessantes [1-5]
- ...tem combinações de ingredientes mais originais [1-5]

Start of Block: O Consumidor de Chocolate Artesanal

Survey Question 18. As afirmações seguintes têm como objectivo avaliar a sua opinião sobre chocolate artesanal. Para cada afirmação, por favor indique qual o seu nível de concordância. Em comparação com o chocolate industrial, o chocolate artesanal...

- ...é mais saudável [1-5]
- ...tem pior sabor [1-5]
- ...tem ingredientes de melhor qualidade [1-5]
- ...é melhor para o País, por ser nacional [1-5]
- ...é uma prenda mais pessoal [1-5]
- ...é resultado de um trabalho feito com amor [1-5]
- ...permite-me pertencer a uma comunidade [1-5]
- ...é produzido por pessoas com quem me identifico [1-5]
- ...tem mais açúcar [1-5]
- ...é mais caro [1-5]
- ...promove melhores condições para os produtores de cacau [1-5]
- ...é produzido em condições higiénicas não controladas [1-5]
- ...tem maiores percentagens de cacau [1-5]
- ...tem combinações de ingredientes originais [1-5]
- ...tem embalagens mais originais [1-5]