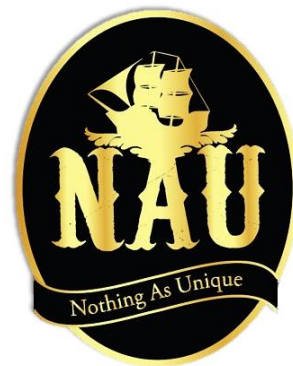


***Developing a digital marketing strategy:  
The case of NAU Beer***

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# Abstract

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**Dissertation Title:** “Developing a digital marketing strategy: The case of NAU Beer”

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The Portuguese Beer market is highly concentrated, being dominated by two industrial Beer brands. NAU is a recent entry in the market, wanting to make a change by launching a Handcrafted Beer, different from any other brand currently present in the market. Likewise any entrepreneurial company, NAU needs to build a brand on a budget. Thus, the study focuses on digital marketing strategies given the growing relevance of the online media channels, as well as its economic advantages. So how can NAU develop a cohesive online marketing strategy so as to create brand awareness?

The present dissertation provides a comprehensive overview of relevant marketing topics of Branding, Positioning, Digital Marketing, Marketing Communications and Social Media in the Literature Review. Additionally, a Market Research is also conducted, which includes two Focus Groups, an Online Survey and a Benchmark Analysis.

The results of this dissertation suggest that NAU is not fully taking advantage of the online channels. Given so, enhancement suggestions for the online channels are given, namely website improvements and initiatives for social media channels, so as to increase the levels of user interaction.

**Keywords:** Branding, Positioning, Digital Marketing Strategies, NAU, Alcoholic Beverages.

# Resumo

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**Título da Dissertação:** “Developing a digital marketing strategy: The case of NAU Beer”

**Autora:** Joana Rodrigues Rosa

O Mercado Português da Cerveja é altamente concentrado sendo dominado por duas marcas de cerveja industrial. A NAU entrou recentemente no mercado com a intenção de o revolucionar ao lançar uma Cerveja Artesanal, diferente de todas as outras marcas presentes no mercado. Como qualquer outra empresa empreendedora, a NAU precisa de criar a sua marca com um orçamento reduzido. Assim, o presente estudo centra-se na criação de estratégias de marketing digital devido à crescente relevância dos meios de comunicação *online*, e as suas vantagens a nível económico. Deste modo, como pode a NAU desenvolver uma estratégia de marketing digital coerente de forma a ser reconhecida no mercado?

Esta dissertação contém uma ampla Revisão Literária de temas de relevantes como *Branding*, Posicionamento, Marketing Digital, Estratégias de Comunicação de Marketing e Redes Sociais. Adicionalmente, é realizado um Estudo de Mercado que inclui dois *Focus Groups*, um Questionário Online e uma Análise de *Benchmark*.

Os resultados sugerem que a NAU não está a maximizar o uso das suas plataformas online. Assim sendo, sugestões de melhoria para os canais digitais são dadas, nomeadamente melhorias a implementar no website e iniciativas a implementar nas redes sociais, com o objectivo de aumentar os níveis de interacção com os usuários.

**Palavras-chave:** *Branding*, Posicionamento, Estratégias de Marketing Digital, NAU, Bebidas Alcoólicas.

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# 1. Introduction

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## 1.1. Market Overview

The global Beer market had a moderate rate of value growth having reached a compound annual growth rate (CAGR) of 2.9%, for the 2010-2014 period. Such growth was motivated by strong growth rates in many developing countries as Brazil, India or China whereas growth in most developed countries has remained weak.

On an all-inclusive level, Europe is the most profitable market for Beer, representing over 36.4% of the global value. Nevertheless, in recent years, the European Beer market has been facing harder times. The revenues in the Beer market in Europe accounted for \$179.8bn in 2014, which represented a CAGR of 1.5% between 2010 and 2014. Nonetheless, a higher growth rate is predicted for the European market over the period of 2014-2019.

Regarding consumption in Europe, the compound annual rate of change (CARC) was of -0.3%, between 2010 and 2014, reaching a total of 43.5 billion liters in 2014. Similarly, the Portuguese Beer market has been moving alongside the European market. Both production and consumption levels (total and per capita) have declined since 2010.

Despite lower levels of production and consumption in the aforementioned markets, the number of microbreweries has been increasing on a global level. Being Portugal no exception, the number of microbreweries grew 150% from 2013 to 2014, totalling 30 in 2014. This growth in the micro brewing business results from the latest trend of the Beer market, the Handcrafted Beers. What sets apart a Handcrafted Beer from an industrialized one is not the amount of beer produced but rather the manufacturing process. Thus, handcrafted beers are born from traditional methods and high-quality ingredients.

In Portugal, the Handcrafted Beer market is much smaller and has been developing slower than in other countries. The gentler market expansion is due to both the lack of Beer tradition, as well as the structural difficulties lived within the country.

## 1.2. Problem Statement & Research Questions

Nothing As Unique (NAU) was created in 2015 and is a Handcrafted premium Beer brand born from the determination of three young business students who grasped the market opportunity for this product. The entrepreneurs developed their own Beer recipe which after being much complimented was taken up for production. In April 2015, the first batch of NAU was produced via a microbrewer in Oporto. The first batch, served as an experiment, being mainly for improvement purposes and sold only to family, friends and fools (FFF).

A year later, NAU has produced their third batch, for a total of 1.087 liters produced within the first year of business. The brand is present on diverse sales channels, from restaurants to gourmet shops as well as online. Regardless, NAU like any entrepreneurial company faces many challenges in the effort to penetrate the market and scale-up. One of most pressing queries relates to the fact that, to get as many sales as possible in shortest amount of time conceivable, the start-up invested solely in distribution.

NAU is in fact considered to be on the TOP 10 best Portuguese Handcrafted Beers (*Cerveja Magazine*). Nevertheless, the brand has little to none brand awareness. NAU currently only sells their Beer in a bottle rather similar to the ones used for champagnes, and in a 0,75cl format (Exhibit 1). In terms of positioning, NAU wants to be perceived as a premium Beer that intends to be THE Beer among Wines, – thus, having a price comparable to the one of a bottle of good quality Wine – serving as an alternative to those who need a refined beverage and, yet still prefer to drink a Beer. Moreover, NAU's price also depends on the channel in which the Beer is being sold. As an example, NAU is usually sold for 8€ a bottle (0,75cl), yet in restaurants the bottle can be priced well above.

Despite being present in multiple online platforms, the brand still does not have a defined online nor offline marketing strategy as the brand has invested little in marketing. Considering what was mentioned above, the problem this thesis strives to clarify is: What online strategies should NAU follow, to further penetrate the Portuguese Beer market?

Taking into account what was mentioned above, the research questions that I propose to answer are as follows:

**RQ1:** What are the alcohol consumption habits of the Portuguese population?

**RQ2:** How do Portuguese consumers currently perceive NAU?

**RQ3:** What positioning strategy should NAU follow?

**RQ4:** How can NAU improve its online strategy?

### **1.3. Academic and Managerial Relevance**

This topic is academically relevant since it will allow to have a practical example in understanding how a micro corporation can take advantage of digital platforms so as to build brand awareness and create a digital strategy that engages consumers. Moreover, this study intends to help to understand the consumption habits of alcoholic beverages and how to change them, given that this is a rather novel product for the Portuguese market.

This study is also relevant to NAU, helping them to overcome their current challenge – how to develop an online marketing strategy that enables the company to scale up, achieving a sustainable market position.

### **1.4. Dissertation Outline**

Chapter 2 presents a literature review on the topics relevant for this dissertation, namely Branding, Positioning, Digital Marketing, Marketing Communications and Social Media. Afterwards, chapter 3 focuses on describing the types of research conducted, and the methods used. Chapter 4 presents and discusses the results obtained. Lastly, Chapter 5 delivers the main conclusions and recommendations, as well as the main implications and limitations of this dissertation. If desired, exhibits can be consulted in chapter 6.

# 2. Literature Review

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The aim of this section is to provide a comprehensive overview of academic articles related to the relevant marketing topics of this dissertation, such as Branding, Positioning, Digital Marketing and Social Media. However, on some of the topics the literature is rather scarce, as mentioned by numerous authors.

## 2.1. Branding

According to Keller and Lehmann (2003) brands are one of the most important intangible assets for any company, as they are a reflection of the complete experience that consumers have - from the product itself, to its usage and to the accompanying marketing activities. Intangibles cover an extensive variety of brand associations (Keller, 2001) which are frequently used by marketers to differentiate their brands (Park *et al.*, 1986). In fact, “branding happens in the minds of consumers” (Reiss, 2011).

Given so, it is understandable why branding has become a management priority in the latest years (Keller and Lehmann, 2006). These authors state that being able to manage brands appropriately so as to exploit their value is critical – brand equity. Accordingly, brand equity can be defined as the additional value the brand delivers to the product (Farquhar, 1989).

Understanding how to build, measure, and manage brand equity is protuberant (Kapferer 2005; Keller 1993, 2003) as successfully managing a portfolio of brands requires mutual and efficient performance measures (Aaker, 1996; Keller & Lehmann, 2003). Regarding brand equity measurements, researchers developed different perspectives, namely customer based, company based and financial based. The difference in perspectives is due to the fact that, brands impact three main levels - customer market, product market, and financial market (Keller & Lehmann, 2006).

Thus, different authors have developed different schemes to understand how brands create value, and how to measure brand equity. As an example, Aaker (1996) developed the Brand Equity Ten, a model based on four core dimensions - loyalty, perceived quality, associations and awareness - whose brand equity measures can be applied to numerous markets and products. On the other hand, Keller and Lehmann (2003) developed the Brand Value Chain

Model which undertakes that brands start creating value only upon investment in marketing activities - customer based perspective.

Keller and Lehmann (2006) emphasize that brands also play a significant role in accessing the effectiveness of the marketing efforts, as brand associations are a relevant dimension of brand equity (Aaker, 1996). Furthermore, the author asserts that such associations generally involve distinctive product and brand image. Besides, there is academic agreement on the fact that more favourable and exclusive associations differentiate strong from fragile brands (Koll & von Wallpach, 2014). Thus, a company should focus on realizing what characteristics increase the likelihood for positive valence (Koll & von Wallpach, 2014).

Also to consider is that consumers want to see their influence over the brands they connect with (Yan, 2011). As technologies changed and Internet usage became more extensive, brands were impacted. Yan (2011) highlights that, by going online, audiences now have the ability to better understand the personalities behind brands, and thus brands must be genuine (Reiss, 2011; Yan, 2011). In response, users may help in the development of the brand strategy by means of providing real and timely feedback, thus providing stronger brand equity, better brand associations and perceived quality as well as greater awareness. (Yan, 2011). On the contrary, the author refers that brands not supported by additional media are likelier to fail.

## **2.2. Positioning**

Aaker and Shansby (1982) state that there is a lack of congruence regarding the term “positioning” as it is defined differently amongst authors. Besides, there is also a lack of formalized and inclusive strategic positioning models (Blankson & Kalafatis, 2007).

As expressed by Arnott (1992) “positioning is the deliberate, proactive, iterative process of defining, measuring, modifying, and monitoring consumer perceptions of a marketable offering”. Managers may interpret positioning as a segmentation decision, an image question or even the selection of which product features to put emphasis on (Aaker & Shansby, 1982). However, according to these authors, few see positioning as a combination of the possibilities mentioned above. Moreover, Keller *et al.* (2002) state that brand positioning serves as guideline for what the brand should do, or not marketing wise thus, setting the direction of all marketing activities and programs.

When defining a positioning strategy one should focus on identifying competitors and determining their positions, as well as on understanding costumers' perceptions, relevant attributes, and market segments (Aaker & Shansby, 1982). Thereafter, the positioning strategy to be followed must be selected and monitored. One must also consider that, under certain conditions, some brand characteristics (e.g. physical attributes, target market size,...) may limit or even define the brand's positioning possibilities (Sujan & Bettman, 1989).

Brand positioning involves creating the key brand associations in consumers' minds, as well as other important constituents so as to differentiate the brand and establish competitive advantages, to the extent possible (Keller *et al.*, 2002). In addition, Aaker and Shansby (1982) also discuss that a brands' positioning has significant impact in customers' perception and decisions. It is therefore central to understand the similarities and differences in consumers' perceptions between the brand and its competitors, within the same product category (Sujan & Bettman, 1989). Moreover, Aaker and Shansby (1982) highlight the need to focus on the development of a cohesive and supportive marketing strategy.

Furthermore, Sujan and Bettman (1989) validate that perceptions of how different a brand is from others affects the perceptions of the brand's position, within the category. Additionally, it is concluded that when several differentiating product features are communicated in a single advertisement, consumers' perceive it as a subtype brand. Conversely, when such features are communicated over various advertisements, it is perceived as being a differentiated brand.

In conclusion, when in a situation of market complexity, positioning can in fact be one of the most difficult decisions that a company has to make (Schnedler, 1996).

## **2.3. Digital Marketing**

Smith (2011) defines Digital Marketing as the practice of promoting products and services by means of digital distribution channels. According to the author, Digital Marketing or e-marketing consists of digital or online advertising that delivers marketing messages to customers. Likewise, Chaffey *et al.* (2003) also mention digital marketing and e-marketing as comparable concepts. The idea behind such similarity, is that both terms revolve around the use of electronic media to manage and execute marketing practices, so as to reach the underlying marketing objectives.

Strauss and Frost (2014) state that this digital content is bigger than both the web and technology itself. According to the authors, electronic marketing influences far beyond the web, and the current easiness of accessing information has reshaped the power that consumers have, while transforming the roles of individuals, businesses, economies and societies. Strauss and Frost (2014) also mention that, to be successful, digital brands must be able to generate and deliver Trust, Reputation, - by understanding and updating clients' beliefs - Relevance and Engagement.

Moreover, Webster (2004) argues that this newest marketing communication channel, is both efficient as well as valuable as it enables brand building brands, reaching new markets and acquiring new customers. In addition, the author also states that, the web gives the company the capacity to create a dialogue with the customer, while tracking its activities.

Besides, digital marketing must offer an amplified and value-adding experience (Aaker, 2016), that should not be easily replicated by conventional media (Breitenbach & van Doren, 1998). In fact, Edelman (2010) showed that by tightening the coordination of the end-to-end experience companies can fasten revenue growth by earning **10%-20%** of incremental revenue from new and loyal customers via online channels. All while deepening connections with the customers (Edelman, 2010).

## **2.4. Marketing Communications**

According to the American Marketing Association, "Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large." Thus, marketing management is both the art and science of selecting target markets, as well as acquiring, keeping, and growing clients by means of creating, delivering and communicating greater customer value (Kotler & Keller, 2009). Moreover, Communication can be defined as the process of conveying thoughts between users, or between organizations and users (Smith *et al.*, 1997).

Drastic changes have been happening in the marketplace and nowadays, it is not what it used to be. Internet, for example, has impacted greatly the way marketers nowadays work as, among other benefits it augments marketers' geographical reach (Kotler & Keller, 2009). Investing in traditional marketing communication channels requires great financial investments. As a result,

the Internet, and namely Social Media, can be a remarkable opportunity for companies with considerably lower financial resources (Tomse & Snoj, 2014).

Despite the importance of marketing communications, when in need to reduce costs, one of the first things that companies do to save money is to reduce their advertising spending. Assat *et al.* (2015) demonstrated that doing so is erroneous as higher advertising spending results into higher sales performance. Instead, firms should measure and consider advertising spending as a crucial investment to the companies' success (Luo & de Jong, 2012; Joshi & Hanssens, 2010).

Communications have other pertinent contributions to a brand as, among others, it fosters brand building (Bruce *et al.*, 2012) and increases brand awareness (Buil *et al.*, 2013). The later author also recommends brand managers to: design campaigns originally and creatively so as to influence brand associations; and to pay special attention to promotional activities – as monetary promotions may reduce brand equity, whereas non-monetary promotions (e.g.: gifts) may develop brand equity.

Additionally, Moore and Lee (2012) focus on the importance of imagery visualization and of conveying hedonic appeals in campaigns. According to the authors, if an advertisement features consumption pleasures, consumers are likelier capable of anticipating the taste and emotions experienced during consumption. Hence, causing purchase impulses and positively affecting the purchase behaviour of consumers (Moore & Lee, 2012).

Lastly, Kotler and Keller (2009) reinforce the importance of having an integrated strategy approach to communications. Accordingly, all communications made by the company should complement and reinforce each other so that, the multiple means of creating, delivering, and communicating value are used and combined in the best way possible. This meaning, marketing activities have interaction effects among themselves as well as main effects (Keller & Lehmann, 2006). Hence, the value of both the individual and collective value of all communication activities should be maximized (Kotler & Keller, 2009). Moreover, Kotler & Keller (2009) also mention that these activities should simultaneously be achieving multiple objectives for the business. In agreement, Keller and Lehmann (2006) state that, a variety of conducted branding and marketing activities, if cohesive, can help a brand in achieving the desired brand positioning and build brand equity.

Due to the relevance of the topic for this dissertation, I will now focus on further developing the concept of Social Media.

## 2.5. Social Media

Kaplan and Haenlein (2010) define Social Media as “a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of User Generated Content”. This meaning, social media makes use of web-based technologies to generate interactive platforms in which individual (both users or communities) co-create, modify, discuss and share user-generated content (Kietzmann et al., 2011). Moreover, accordingly to Kaplan and Haenlein (2010) Web 2.0 can be seen as the platform for the evolution of social media.

With Social Media consumers are no longer minor passive recipients in the marketing process (Hanna *et al.*, 2011). Nowadays, the customer role has evolved, as users moved from being simple consumers to also being content co-creators, unlike in the previous generation of the web (O'Reilly, 2005). Thus, consumers are now “Prosumers”, being both information producers and consumers (Toffler, 1980). More than ever, customers are seeking to digitally engage both with the companies that they buy from, but also with other consumers so as to acquire and share valuable insights (Garretson, 2008). Regardless, not all participants engage in a similar manner in the social media ecosystem (Hanna *et al.*, 2011). In accordance, Li and Bernoff (2008) segmented active participation by taking into account five different types of social behaviours: “Creators (e.g. publish, maintain upload); Critics (e.g. comment, rate); Collectors (e.g. save, share); Joiners (e.g. connect, unite); and Spectators (e.g. read).”

Thus, social media is no longer about websites, it now regards the value-added consumer experiences (Aaker, 2016; Hanna *et al.*, 2011; Wyshynski, 2009). Such experiences arise from marketers' ability to incorporate reach, intimacy, and engagement into the company's overall integrated marketing communications strategy (Hanna *et al.*, 2011). Yet, the authors show concern in the firms' ability to develop an integrated strategy given that, in most cases, social media channels are seen as unrelated platforms that function independently of each other.

Schultz (2007), created a pictorial version of the social media ecosystem (Figure 1), in which is showed how dominant is social media, and how are all the different platforms interconnected. As acknowledged by the author, learning how to manage the social media ecosystem is a novel, but indispensable skill in today's unpredictable world.

## *Social Media Ecosystem*



*Figure 1: Social Media Ecosystem. Source: Schultz, 2007*

Further, Corcoran (2009) then divided the ecosystem into three types of media: owned media - media that is controlled by the marketer (e.g. company website); paid media - media that is purchased by the marketer (e.g. sponsorships); and lastly, earned media - which is not controlled nor purchased by the marketer (e.g. word-of-mouth, viral).

What is more, Kaplan and Haenlein (2010) also classified and divided social media by the level of social presence/media richness and level of self-presentation/self-disclosure – from Collaborative projects, Blogs, Content communities, Social network sites, Virtual game worlds to Virtual social worlds. In what concerns the first level of social media, the authors claim that Collaborative projects are the most democratic display of user generated content as they enable the joint and immediate creation of content by many end-users. On the last stage of social media there is Virtual social worlds that rank highest on both social presence/media richness and level of self-presentation/self-disclosure (Kaplan & Haenlein, 2010). Additionally, the authors developed a 10-pieces of advice for companies which decide to make use of social media. From that guidelines, the following pieces of advice are to be noted:

- ❖ *It all depends on the message and target:* When choosing the right channels for any given purpose, it all depends on the target to be reached and the message to be conveyed

as different platforms usually tend to attract a certain group of people and firms. Therefore, a firm should be active where their customers are;

- ❖ *Social presence must be integrated and cohesive across channels:* The firm's social media activities should all aligned;
- ❖ *It's all about sharing and interact:* As a result, firms should guarantee content that is fresh and new, as well as engage in discussions with clients so as to satisfy customers' desire to actively interact with the firm.

Concluding, social media allows firms to engage, in a timely and direct manner, with considerably low costs and higher efficiency levels than those that can be achieved with rather traditional communication methods (Kaplan & Haenlein, 2010). Moreover, Colliander (2012) concluded that social networks are more effective than traditional channels when it comes to brand positioning and brand perception.

# 3. Methodology

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This study contains both primary and secondary data. The primary data was collected within the company and from consumers in the Portuguese Market. As a result, this research relies both on qualitative and quantitative data. The secondary data collected was retrieved from market research reports done previously to this study, as well as data based on NAU's insights.

In order to answer the proposed Research Questions, two Focus Groups were conducted so as to understand participants' habits on consumption of alcoholic beverages. In addition, an online survey was also conducted. In both studies, it was important to have consumers of both genders, with distinct income levels, from all age groups and with different backgrounds. Given that the legal age for purchasing and consuming alcoholic beverages in Portugal is of 18 years old, only adults were accepted as respondents in both studies. Lastly, a benchmark study was also conducted in order to understand what digital strategies competitors are currently pursuing.

Secondary data is information collected mainly from relevant statistical data, market studies that analyse the both the Portuguese and European Beer market, websites that focus on the present topic and the company's and competitors' main websites. This work was also supported with the company's information regarding desired positioning and current strategy.

## 3.1. Focus Groups

As previously mentioned, two Focus Groups were conducted. Given that this dissertation focus only on the Portuguese market, both sessions were conducted in Portuguese having each lasted for about 60 minutes. Between groups, the participants were as heterogeneous as possible, being dissimilar in terms of age, employment and financial status. Thus, avoiding biases and answer similarity. However, within groups members were fairly homogeneous, which was fundamental to ensure a relaxed and comfortable environment, thus fostering involvement and idea sharing. As expected, the results from the two Focus Groups were considerably distinct. A translated version of the guideline can be found in Exhibit 2.

During each session, participants were asked questions regarding purchasing power, alcoholic beverages consumption and purchase habits, brand preferences, as well as brand awareness and perceptions. Keller's Customer-Based Brand Equity (CBBE) pyramid was used when structuring the questions for the focus group.

Given the lack of tradition and knowledge about the Handcrafted Beer market in Portugal, as well as desired positioning, it was necessary to consider both Beer and Wine as competitors/substitutes for NAU in order to measure perceived differences and similarities.

### **3.2. Survey**

After analysing the insights retrieved from the focus groups, an online survey was conducted. Similarly to the focus groups, the survey was available in Portuguese, being distributed online from March 28<sup>th</sup> to April 13<sup>th</sup>, 2016. An English version of it can be found in Exhibit 3.

Once again, in this study, it was also fundamental to measure the consumption habits of Portuguese consumers' regarding alcoholic beverages, as well as overall awareness and perception of the Portuguese Handcrafted Beer market and of the brand NAU. The main drive for conducting the survey was to collect information to understand how NAU should position itself in the market and it is currently perceived and compared against competitors, both in a direct (other Handcrafted Beers), and indirect (industrial Beers, Wines and others) perspectives.

From the online questionnaire, 563 answers were collected, and of those, only 386 were considered as valid responses. The remaining ones were rejected due to incompleteness, lack of attention from respondents and due to some inquiries being still younger than what was intended. The data was thereafter analysed using IBM's SPSS Software. Moreover, whenever statistical tests were conducted and hypothesis tested, a significance level of 5% was considered.

Likewise in the focus groups, Keller's Customer-Based Brand Equity (CBBE) pyramid was used to build the questions for the survey. Moreover, once again perceived differences and similarities were measured by considering both Beer and Wine as competitors/substitutes for NAU.

### **3.3. Benchmark**

Lastly, a competitive benchmark analysis was conducted. This benchmark study had the purpose of understanding how are NAU's main competitors making use of the digital world via their website, in order to understand how the best-in-class are marketing their product(s) online. Thus, the first step in this analysis was to understand who the main competitors in the category are.

Given the minor market size of the Handcrafted Beer market in Portugal, two online directories containing all the Portuguese brands were consulted (*Cerveja Artesanal Portuguesa & Rate Beer*). After disregarding own brands, – restaurants that sell their own Beer brand - it was found that there are currently 98 brands of Portuguese Handcrafted Beer. Given the size of this initial selection, it was necessary to reduce the number of brands to analyse so as to achieve the fiercest online competitors. Therefore, factors as Online Presence, Online Sales Channels and Market Recognition were under analysis. Due to the lack of available information on each brand’s market share and volume of online sales, other performance metrics had to be considered. A brief description of all factors evaluated can be found in the figure below.

***Factors Considered for Benchmark***

<b>Online Presence</b>	Indicators that focus on which digital channels are brands using so as to measure and quantify the extent of online presence.	
<b>E-mail</b>	<b>Personal</b>	A personal and free service email address is used (e.g.: name@gmail.com or name@hotmail.com).
	<b>Generic</b>	A free service email address is used (e.g.: company@gmail.com or company@hotmail.com).
	<b>Corporate</b>	A corporate email is an email address specifically created for your company (e.g.: @yourcompany.com).
<b>Social Media</b>	<b>Facebook</b>	The brand has a Facebook page.
	<b>Instagram</b>	The brand has an Instagram page.
	<b>Others</b>	The brand is present in other Social Media (e.g.: Google+, Twitter).
<b>Website</b>	<b>Coming Soon/ Unavailable</b>	The brand currently does not have website.
	<b>Online Contact Form</b>	The brand has a website containing only the company’s contacts.
	<b>Available</b>	The brand currently has a website.

<b>Online Sales Channels</b>	Indicators that focus on which digital sales channels are brands using so as to measure and quantify the extent of online presence.	
<b>Website</b>	<b>Coming Soon/ Unavailable</b>	The brand is currently not selling via their website.
	<b>Available</b>	The brand is currently selling via their website.
<b>Social Media</b>	<b>Coming Soon/ Unavailable</b>	The brand is currently not selling via their social media page.
	<b>Available</b>	The brand is currently not selling via their social media page.
<b>3<sup>rd</sup>- Party Retailer</b>	<b>Available</b>	The brand is currently selling via a third-party retailer (e.g.: <a href="http://cervejaportuguesa.com/pt">cervejaportuguesa.com/pt</a> ).
<b>Online Metrics</b>	Indicators that serve as a proxy to measure and quantify online sales and market share.	
<b>Facebook</b> (retrieved on May 5, 2016)	<b>Likes</b>	Number of likes in the brand's Facebook page.
	<b>Rating</b>	Average product rating.
	<b>User interaction</b>	Number of people who rated the product on the brand's Facebook page.
<b>Market Recognition</b>	Indicators that measure and quantify the extent to which the brand is recognized in the market - due to the non-availability of market share, market recognition was measured by means of awards received.	
<b>Awards</b>	<b>National</b>	The brands has received at least one national award.
	<b>International</b>	The brands has received at least one international award.

Figure 2: Factors Considered for Benchmark. Source: Benchmark Analysis

Afterwards, a detailed examination of both Online Presence, Online Sales Channels and Market Recognition per brand was conducted so as to reduce the number of competitors (Exhibit 4). From the starting 98 brands to the selection of the final ones, several steps took place. In each stage, brands were overlooked due to not fulfilling the required criteria, which guarantees the quality of the analysis.

For NAU’s founders, it was important that this benchmark served as a steppingstone for improvement of NAU’s website and online sales channels. Hence, firstly, competitors which had insufficient information available online and that lacked a website were discarded. However, an exception was created for brands that already have market recognition, as it is assumed that such companies have proven a track record of quality, online and offline. From the remaining 32 brands, those who had no presence in any type of online sales channels were also disregarded, using once again the same exception rule. As a result, 7 brands were rejected, for a total of 25 companies still for consideration.

Lastly, and due to the impossibility of comparing Online Market Shares, the social network Facebook was used as a proxy. By doing so, it allowed for the direct comparison of all remaining brands since all are present on Facebook. The metrics used for comparison were Likes, Product Rating and User Interaction. Based on the Online Metrics, retrieved on Facebook, and on Market Recognition (as it can be seen in the figure underneath) the brands that perform above average were highlighted. From those, the following 5 main competitors that stand out were considered to be the ones with the best online presence and performance: Dois Corvos, Letra, Maldita, Praxis Sovina e Vadia.

**Final Selection of Competitors**

	Online Metrics			Market Recognition		Online Presence						Online Sales Channels				
	Retrieved on May 05			Awards		E-mail			Social Media			Website	Website	Social Media	3rd-party retailer	
	Likes	Rating	User Interaction	National	International	Personal	Generic	Corporate	Facebook	Instagram	Others					
5 e Meio	930	-	-	✓				✓	✓			✓				
Amnésia Brewery	1.738	-	-	✓		✓				✓						✓
Amphora	6.671	4,8	43					✓	✓		✓	✓				✓
Aroeira	3.378	-	-	✓				✓	✓			✓				✓
Bolina	2.044	-	-					✓	✓			✓	✓	✓		✓
Buja	3.490	4,9	29					✓	✓			✓	✓			
Celtas	467	5,0	5					✓	✓	✓		✓	✓	✓		
Deusa	2.000	-	-		✓			✓	✓			✓				
D'os Diabos	802	5	7	✓				✓	✓			✓				✓
D'Ourique	804	-	-					✓	✓			✓	✓			
Dois Corvos	3.329	4,9	26	✓	✓			✓	✓		✓	✓				✓
Letra	20.376	4,7	134	✓	✓			✓	✓		✓	✓	✓	✓		✓
Maldita	5.760	4,7	101		✓			✓	✓		✓	✓				✓
Mean Sardine	3.383	4,6	24	✓			✓	✓	✓		✓	✓				✓
Mediaevalis	1.415	-	-				✓	✓	✓			✓	✓			✓
Nau	1.247	-	-	✓			✓	✓	✓	✓		✓	✓			✓
Oeste	621	-	-					✓	✓			✓	✓			
Oitava Colina	4.706	5,0	1	✓				✓	✓	✓		✓	✓			
OPO74	1.550	-	-	✓				✓	✓			✓	✓			✓
Passarola Brewing	3.043	-	-	✓				✓	✓		✓	✓				✓
Post Scriptum Brewery	1.796	-	-	✓				✓	✓			✓	✓			✓
Praxis	20.560	4,3	903				✓	✓	✓		✓	✓	✓			✓
Sovina	20.932	4,5	297					✓	✓		✓	✓	✓			✓
Vadia	12.499	4,7	105	✓	✓			✓	✓		✓	✓	✓			✓
Vitória	847	-	-	✓			✓	✓	✓			✓	✓			
Market Average	4.976	2,3	67													

Figure 3: Final Selection of Competitors. Source: Benchmark Analysis

# 4. Results analyses

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## 4.1. Focus Groups

Given the lack of tradition and novelty of the Handcrafted Beer market in Portugal, it was imperative to consider several aspects. Firstly, it was important to understand the current perceptions and awareness of consumers regarding this beverage. Additionally, and when considering NAU's desired positioning, it was also important to understand the perceived differences between Handcrafted Beer to both industrial Beers, as well as with Wines.

### Lifestyles

The first focus group was conducted with 8 members, who were either still students or in their first job position. The participants' ages ranged from 22 to 24 years old. All of them live in Lisbon's Metropolitan Area, both in the city centre and in small towns close to Lisbon, and belonged to medium/high income families. The second focus group had 5 participants, aged between 33 and 56 years old, who live in the Lisbon Metropolitan Area, and all have full-time jobs. Apart from one, all participants were married and had children. In both Focus Group participants had different preferences regarding preferences and consumption habits of alcoholic beverages, as well as consumption habits of Handcrafted Beer - medium consumers, light and non-consumers.

When asked about how receptive participants are to trying new products, the younger segment (first group) appeared to be less receptive to trying new products, relying heavily on the opinions and insights of others. On the other side, the second focus group was quite receptive to trials. Thus, one can conclude that the younger segment is more risk averse.

### Alcoholic Beverages Consumption & Purchase Habits

Between groups, both the consumption and purchase habits are reasonably different. In the first focus group respondents mentioned to drink alcoholic beverages between one to three times per week, namely Beer and spirits. Consumption is done mostly in coffees, restaurants and bars. Without being asked, participants mentioned their consumption is rather seasonal as, in the summer time, consumption is done on a daily-basis. In the second focus group, on average, consumption is done more frequently, but there is also more variability in the answers as

respondents mentioned to drink alcohol between 3 and 10 times, weekly. Within this particular group of participants, consumption is done mainly in restaurants and at-home and a preference for Wine was displayed.

### **Beer & Wine Consumption**

Regarding Wine consumption habits, answers were very different among the participants. In the case of the first focus group, not all of the respondents were used to or enjoyed drinking Wine. Moreover, those who drink it usually do it on either special occasions or family events. In the case of older participants, Wine is drunk with regularity, and on quotidian situations. In addition, due to the higher level of consumption, the latest participants also mentioned to have already developed preferences in terms of Wine regions and grape variety. Regarding the first focus group, participants spend on average 5€ per Wine bottle whereas members of the second focus group tend to spend around 8€, per bottle.

Additionally, Beer consumption habits also differed between groups. In the first focus group, almost all participants are regular consumers of Beers, and are willing to pay, at most 1,5€ per Beer. Respondents in the second focus group mentioned to drink it only in rare occasions, and mainly in summer time, while paying an average of 1,5€ per Beer. When it comes to consumption of Handcrafted Beer, in both groups, less than half of the participants had tried it. Moreover, all of those who had tried mentioned to consume it in rare occasions.

Overall, the younger segment proved to be more price sensitive, due to the smaller available budget. Lastly, according to the participants, the first focus group buys alcoholic drinks with the purpose of immediate consumption, whereas the older participants mentioned to buy it for both immediate or later (at-home) consumption. In fact, only participants from the second focus group visit, some on a regular basis, specialized and gourmet stores.

### **Market & Brand Knowledge**

Some of the participants in both groups had already drunk Portuguese Handcrafted Beer. Despite that, none of the partakers could recall a Portuguese brand nor had they ever heard of NAU. It is therefore concluded that, there is still little to no market awareness or knowledge among participants.

Concerning the attributes valued by participants when consuming alcoholic beverages, no difference was noticeable between groups. Accordingly, respondents give importance to

attributes as *alcoholic content*, *lightness* – easiness to digest – and, particularly *flavour*. However, when asked of all attributes which two were of higher importance, almost all members of the first group mentioned *flavour* and *price*. Once again, the price-sensitiveness of the younger audience was evident. Participants from the second focus group highlight *flavour* as the main aspect. Nonetheless, in some beverages *temperature of consumption* was also said to be a characteristic of high importance by some participants, both in the cases of Beer and Wine. Moreover, all participants mentioned that the main difference between Wine and Beer is mostly the *occasion of consumption*.

Lastly, no trend could be identified among groups when it came to Handcrafted Beer perceptions. All participants seemed to perceive Handcrafted Beer as similar to Wine both in *flavour*, *occasion of consumption* and *alcoholic content*. There was however some disagreement within groups about pricing as, some participants think of Handcrafted Beer as being cheaper than Wine while others see it as of being priced similarly.

### **NAU Beer**

In both focus groups, apart from one participant, response was rather positive regarding NAU's bottle. NAU's bottle is identical to a traditional champagne bottle, and in fact the majority of respondents was able to identify such resemblance without being asked. Moreover, in both focus groups, when asked about what comes to mind when NAU is said, participants evoked both *boats*, *vessels* and the *ocean*. Overall, both the name and packing were mentioned to be *original* and *different*.

Regarding the typical consumer of NAU, a clear dissimilarity of perceptions was noted between groups. Firstly, none of the participants in the first focus group identify themselves with the brand whereas all participants in the second focus groups said the brand to be for “people like me”. Additionally, the younger members imagined the typical consumer to be a serious business man or woman, over 35 years old, looking for “something fancy to drink”. However, in the second focus group, respondents seemed to be divided. Ones associated NAU to an urban man of over 35 years, whereas others related it to a younger professional, under 30 years, keen on sharing an after-work drink with friends. Besides, NAU was described by all contributors as being *Modern*, *Attractive*, *Successful*, *Upper-class* and *Charming*. All of this attributes should then be taken into consideration when developing an effective communication strategy, in order to ensure that consumers' perceive NAU as desired.

Judgments and Performance were also assessed in both focus groups. All participants considered that the packaging is a differentiating factor for NAU, a brand that was considered to be unique among participants. Furthermore, participants quite enjoyed NAU’s taste as only 3 people out of the 13 people that tried did not liked it. Without being asked, some members from both groups mentioned that they could see NAU as a great accompaniment to a steak meal such as the ones served at *Portugália* or at *Café de São Bento*. Similarly to Wine, young participants associated NAU to special occasions whereas older participants associated it to more quotidian situations. Last but not least, participants in the second focus group also said that, if they were in a restaurant they would only try NAU if it was recommended by the waiter.

## 4.2. Survey

### Sample Description

The survey started by asking respondents whether they liked alcoholic beverages or not. Of the 386 valid responses, 75 people (approximately 19%) dislike alcoholic beverages. Those who did not like alcoholic beverages finished the questionnaire at that stage. Thus, out of the valid answers nearly 81% of respondents completed the survey thus revealing their habits and perceptions. Out of the people inquired, over 65% were female and nearly 72% were aged below 24 years old. The subsequent figure shows the gender distribution per age group.

*Gender distribution per Age group*

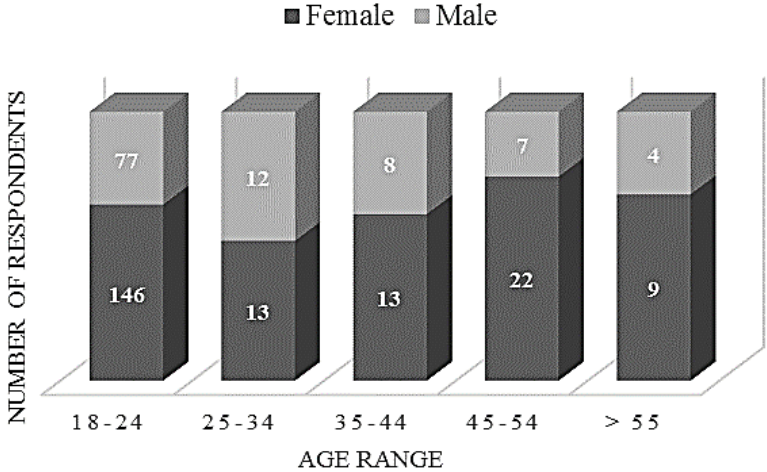


Figure 4: Gender distribution per Age group. Source: Survey Data

Additionally, most participants were either students (59,2%) or employed (37,6%). Regarding monthly income, nearly 50% of the participants earns less than 500€. Such value might be due to the already mentioned high number of respondents there were either aged under 24 years old or that were students. In fact, crosstabulation analysis between occupation and income supports these arguments as from the 155 participants who earned less than 500€, 146 were students and 147 were aged below 24 years. Nearly 21% of the respondents earn between 500€ and 999€, and over 12% have a monthly income between 1.000€ and 1.499€. The remaining 53 respondents (17%) earn more than 1.500€, per month, being the majority over 45 years old (56,6% out of the 53 respondents).

Lastly, most participants were from Lisbon Metropolitan Area (67,5%) or from the Center region of Portugal (28,9%). In this survey, there were no participants from either Madeira or Azores.

### **Alcoholic Beverages Consumption & Purchase Habits**

Afterwards, the participants were asked a few introductory questions regarding their alcoholic beverages consumption habits. At this stage, participants were still not aware of that the brand NAU would later be introduced into the questionnaire.

Participants seem to drink mainly Wine (75,2%) and Beer (71,4%), followed by Gin (57,2%) and Spirits (51,1%). Additionally, most respondents are medium consumers of alcoholic beverages, drinking between 1 to 2 times a month to 1 to 2 times per week, accounting for 78,8% of the respondents. Nearly 15% of participants drink alcohol 3 or more times per week (heavy consumers). Furthermore, it was also important to understand if there was a linear relationship between demographic variables and consumption frequency. Accordingly, chi-square tests were performed and a statistically significant relationship was found for some variables ( $p\text{-value} < 0,05$ ). Overall, participants from the male gender ( $p\text{-value}=0,000$ ), students and employees ( $p\text{-value}=0,014$ ) drink alcoholic beverages more frequently. The sample's frequency of consumption by gender is shown in Figure 5.

### Frequency of consumption by Gender

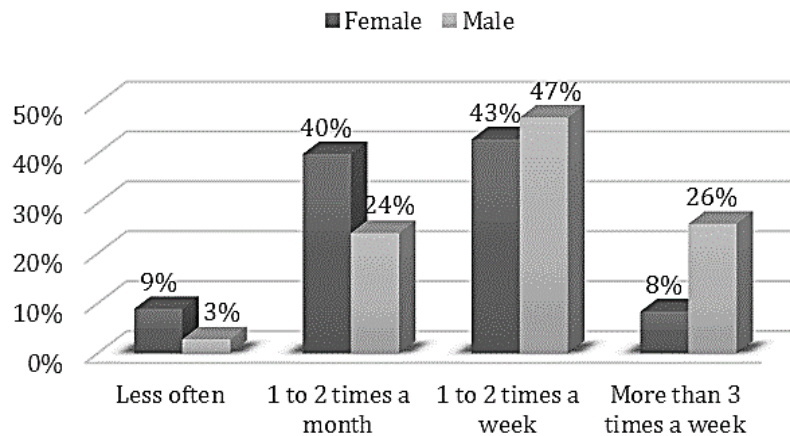


Figure 5: Frequency of consumption by Gender. Source: Survey Data

Accordingly, respondents' consumption of alcoholic beverages occurs mainly during Parties/Social events (96,1%), Special occasions/Celebrations (82,3%) and Meals out-of-home (65,9%). That is supported by the places in which consumption usually occurs as, participants drink mostly in Parties (87,5%), Bars/Nightclubs (83,9%), at their friends' houses (82,3%), as well as in Restaurants (79,1%), as it can be seen below.

### Consumption by Occasion

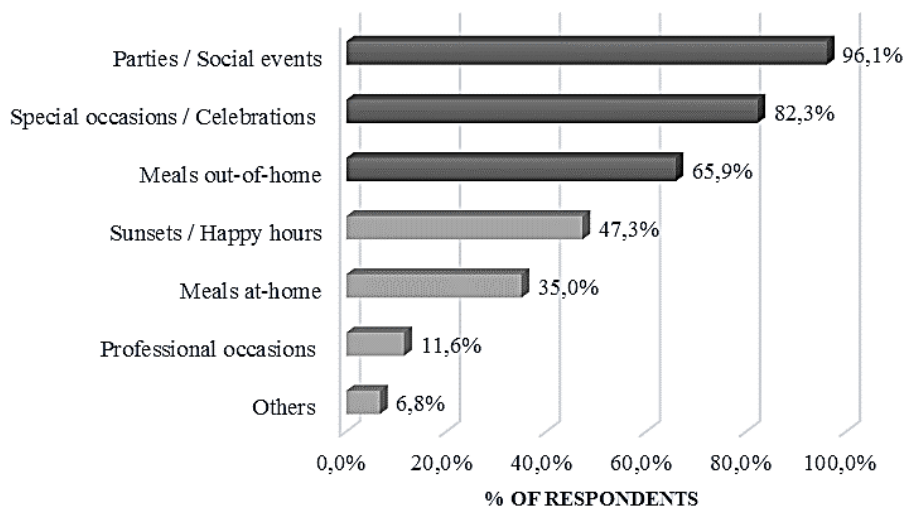


Figure 6: Consumption by Occasion. Source: Survey Data

When considering to buy/drink an alcoholic beverage, participants value most *flavour* ( $M^1=32,2$  and  $SD^2=19,77$ ), *quality* ( $M=26,1$  and  $SD=17,95$ ) and *price* ( $M=20,9$   $SD=15,71$ ).

<sup>1</sup> M stands for Mean

<sup>2</sup> SD stands for Standard Deviation

## Beer & Wine Consumption

Considering NAU's founders desire to be where Wine is, it was then necessary to better understand the perceived points-of-parity (POPs) and points-of-difference (PODs) between these two rather popular beverages. Regarding preferences, participants display a preference for Wine (84,6% like Wine - either Red, White or both - when compared to the 76,2% that like Beer). This result reinforces the one previously obtained under the alcoholic beverages topic.

Additionally, participants in the focus group mentioned that the main difference between drinking Wine and Beer is the *occasion of consumption*. Thus, occasions of consumption for both drinks were assessed so as to understand whether there were significant differences.

### *Consumption Occasion: Beer vs. Wine*

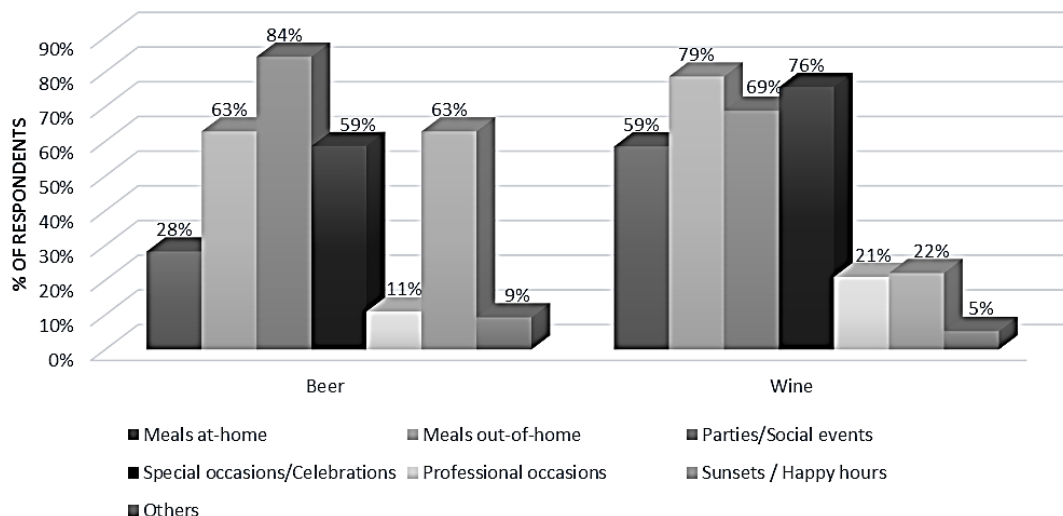


Figure 7: Consumption Occasion: Beer vs. Wine. Source: Survey Data

As noted above, there are noticeable differences regarding the occasion of consumption of Beer versus Wine. The occasions of consumption in which the major differences occur are during Sunsets/happy hours (absolute difference of 40,8%), as well as during Meals at-home (absolute difference of 30,3%). Thus, Wine seems to be preferred during Meals at-home, Meals out-of-home, Special occasions/Celebrations and in Professional occasions. Drinking Beer is associated with Parties/Social events, Sunsets/Happy hours, but also preferred during Meals out-of-home and Special occasions/Celebrations. Thus, most of consumption occasions in which Wine is favoured occurs in both more quotidian events (Meals at-home or Meals out-of-home), as well as in situations with special significance (Special occasions/Celebrations and Professional occasions). On the other hand, Beer is chosen in moments of higher relaxation and

enjoyment as Parties/Social events, Sunsets/Happy hours and Meals out-of-home. In terms of consumption frequency, no particular difference was noted between these two beverages.

Regarding usual points of purchase, most participants mainly purchase Wine in Supermarkets (82,3%) and Restaurants (74,1%), followed by the Specialty stores sales channel (36,9%). Beer is mostly bought in Supermarkets and Bars/Nightclubs (67,9% and 67,1%, respectively), as well as in Cafes (59,9%) and Restaurants (57,8%). In terms of Online/Catalogue sales, both beverages have minimal purchases in such channels. Yet, Wine still has a higher purchase rate via the Online and Catalogue channels (2,7% when compared to 0,8% from Beer).

Afterwards, participants were asked to (dis)agree with nine statements regarding both Beer and Wine. Since the statements were the same for both Beer and Wine, the average values obtained allow for the comparison of associations, thus exposing points-of-parity (POPs) and points-of-difference (PODs) between Beer and Wine. Given so, Wilcoxon tests were performed as the population was proved not to be normally distributed. Out of the nine statements, a statistically significant difference in agreement was found for five of the statements (p-value < 0,05). In conclusion, Wine is perceived to be more expensive than Beer as well as being a fancier drink that is drunk mainly in special occasions. Additionally, Wine was also perceived to be harder to digest (Appendix 7.10). The next figure shows three of the statements in which the difference in agreement between these two beverages was highest.

***Degree of Agreement: Beer vs. Wine***

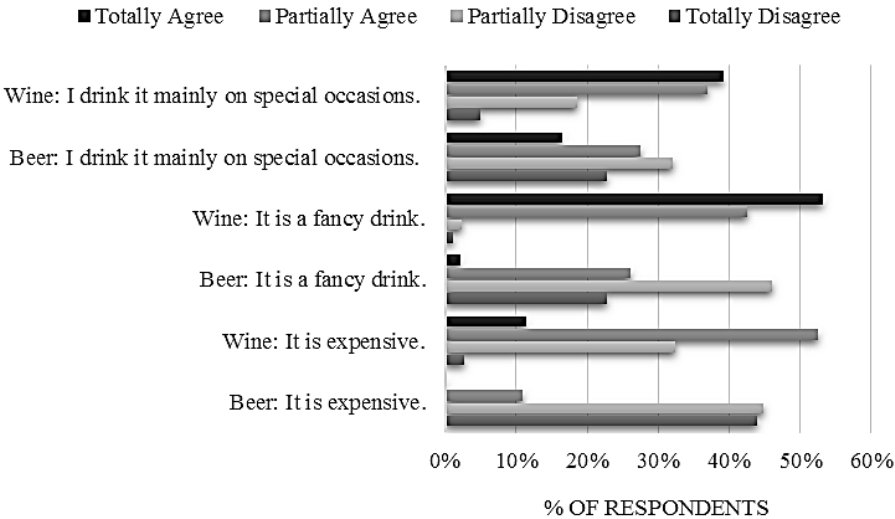


Figure 8: Degree of Agreement: Beer vs. Wine. Source: Survey Data

Lastly, participants also displayed a higher preference for lighter beers instead of darker ones (likewise NAU) as 78,5% of respondents disagreed with the statement “I have preference for darker beers”.

### **Market & Brand Knowledge**

In order to evaluate awareness, brand recall and brand recognition several questions were used. Out of the 311 respondents 45,7% had already tried Handcrafted Beer before, and over 33% who had never tried, showed interest in doing so. Despite the fact that nearly of the respondents had tried Handcrafted Beers, only 61 respondents were capable of recalling a Portuguese Handcrafted Beer brand (around 20% of the sample). Moreover, only 18 people (5,7%) were capable of naming more than one brand. Out of the brands recalled, NAU was mentioned the most ( $R^3=24$ ), followed by Sovina ( $R=14$ ), Maldita and Letra ( $R=11$  for both). The remaining brands were mentioned six times or less.

When asked about whether they knew NAU, only 18,7% was aware of the brand. The majority of respondents that knew the brand had first heard of it through Friends (50%). Following that, the rest of the respondents had mainly had the first contact with NAU through Social Media (24,1%) or Family (10,3%). Only a rather narrow amount of respondents had learned from NAU via Restaurants or Specialty Stores (8,6%).

### **NAU Beer**

Afterwards, participants were introduced to NAU and thereafter, performance, judgments, imagery and feelings were accessed. First of all, inquiries were asked to rate, giving from 1 to 5 stars, the product attributes that they appreciated the most in NAU. The fact that the Beer should be drunk cold (78,8% rated 4 or above), as well as the brands' use of natural ingredients (73% rated 4 or above) and Handcrafted methods (69,5% rated 4 or above) the stood out as being the most liked features. The colour scheme and packaging used were also highly appreciated (65% and 64,3%, respectively, rated 4 or above). Regarding the name NAU, most participants were rather indifferent to it as nearly 30% gave it a rating of 3 stars, out of five. One of the least liked feature was the higher alcoholic content since 40,2% gave it a score of lower than 3 stars. It should be noted that, in terms of attributes, a considerable percentage of

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<sup>3</sup> R stands for the number of times the brand was recalled

respondents went for the neutral value (3 stars in five) which may be explained due to the lack of awareness of the brands, but also due to the lack of category/market knowledge.

Moreover, in terms of performance and judgments, most participants thought of NAU as being of easy digestion (94,9%), as well as of having an attractive image (63,3%). However, fewer perceived it as being of high quality and price (39,2% and 38,9%, respectively), as well as of having a pleasant flavour (16,4%). The high level of participants not perceiving NAU as of pleasant flavour is thus alarming. However, the perception of taste may be affected by the colour of the beer and so, such value may be justifiable by the high level of participants that prefer lighter beers (78,5% as mentioned above). In fact, crosstabulation shows that 67,9% of those who have preference for darker beer are either somewhat or highly interested in buying NAU.

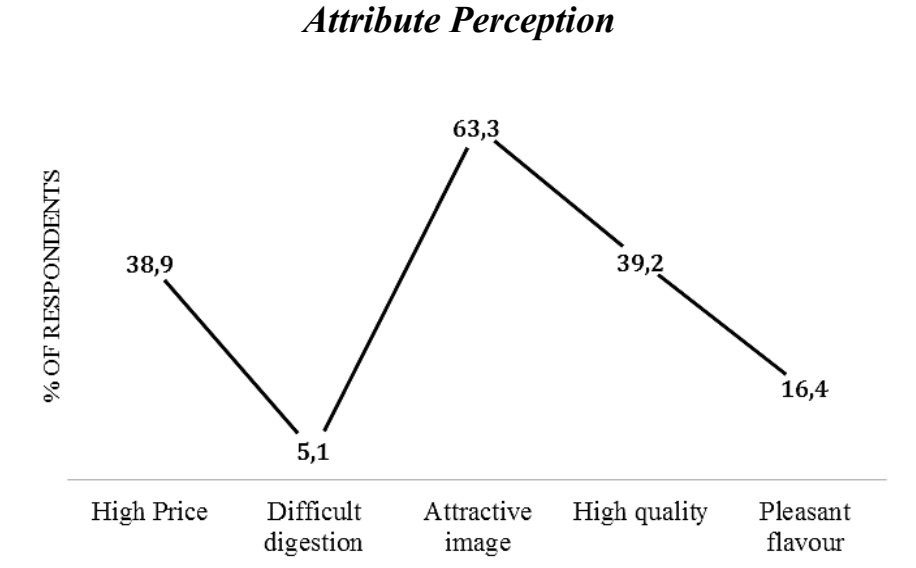


Figure 9: Attribute Perception. Source: Survey Data

Regarding *occasions of consumption*, respondents mainly imagine themselves drinking NAU at Parties/Social Events (53,7%), as well as during Special Occasions/Celebrations (48,9%), Sunsets/Happy Hours (38,9%) or during Meals out-of-home (35,7%). Thus, in terms of consumption occasion, Handcrafted Beer follows a pattern more similar to the one of Beer, than compared to Wine. In what concerns points of purchase, the channels found most appropriate were Specialty Stores (72,2%), Restaurants (53,7%) and Supermarkets (51,8%). To be noted that, a large number of participants (approximately 20,3%) considered the Online/Catalogue channel as appropriate for buying NAU - a rather prominent percentage when compared to the 2,7% and 0,8% from Wine and Beer, respectively.

Once again, participants were asked to (dis)agree with twelve statements regarding NAU. Overall, NAU was considered to be an innovative brand (76,2%), to be drunk in special occasions (74,9%), to share (70,1%), as well as to offer as a gift (65,3%). The number of respondents agreeing that NAU fits their social values (55%), is for “People like me” (46,6%) and that is a brand that they can relate to (40,5%) was considerably smaller. Overall, respondents considered NAU to be a different beverage as it can be seen in the figure underneath.

***Degree of Agreement – NAU vs. Beer & Wine***

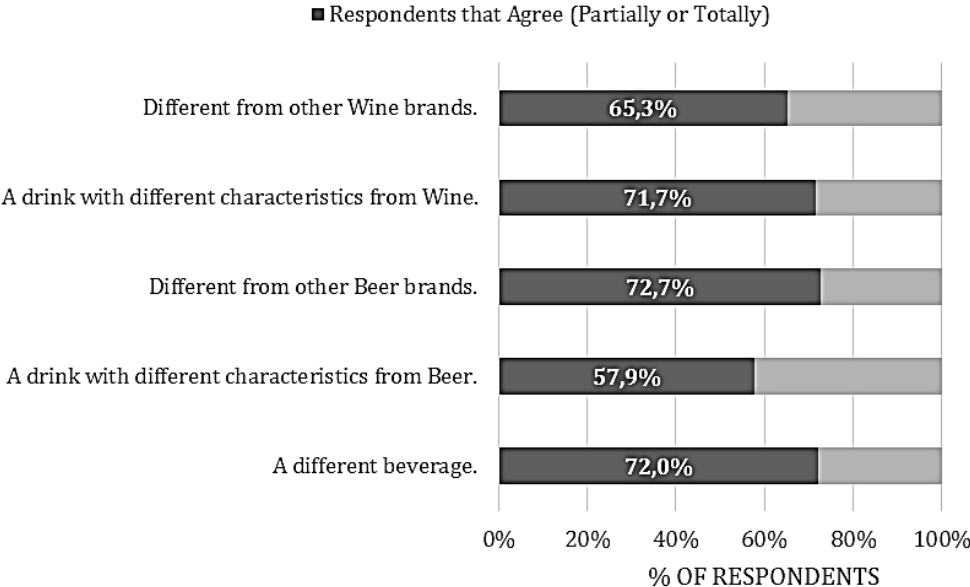


Figure 10: Degree of Agreement – NAU vs. Beer & Wine. Source: Survey Data

During the analysis on the answers collected, it was of importance to understand whether there was a statistically significant relationship between liking Beer/Wine and receptiveness to new products with willingness to try NAU (p-value < 0,05). Based on Chi-Square tests, it was noted that participants that like Beer, as well as participants with higher receptiveness to new products (approximate p-value=0,00 for both) show higher willingness to try NAU. A detailed analysis was thereafter conducted to access NAU’s target. Accordingly, we can divide the market into a few segments. Yet it was concluded that NAU’s target drinks mainly Beer or Champagne, and mostly values *alcohol content* and *flavour*. Also, willingness to try both new products and NAU is high for this segment.

In terms of imagery and according to participants, if NAU was a person it would be someone from Upper class (44,7%), Modern (35,4%), Successful (34,1%), Innovative (32,5%) and also Cool/Trendy (31,8%). Finally, even though only 11,6% of respondents showed a high interest in buying NAU, another 46,9% of participants showed some level of interest.

### 4.3. Benchmark

In this section, the Benchmark results will be presented. The website benchmark conducted analysed both each website in terms of Image and Functionalities, for a total of 10 factors considered. The factors considered resulted from both an extensive analysis of online articles that provided information and guidance on how should SMEs (small and medium enterprises) develop a website, as well from the critic sense of those involved in this project.

In what concerns the **Image** examination, the following features were considered:

Layout & Visual Display – Considers the number of separators presented, as well as the quality of images displayed and amount of visual information. Regarding the number of separators presented, less than 6 separators were considered as *4/5 score*, 7-10 tabs were considered as a *3 score*, and over 11 separators were considered a *1/2 score* – since higher separation difficult navigation on the website. Moreover, images displayed and visual information were classified from *low* to *high*;

Updated Contents – Recognizes whether or not there are areas in which contents can be updated, and whether or not such update is being made (for example news, events, among others);

Information Displayed – Examines the clarity of the information displayed, both in terms of language used (schematic, plain text,...), as well as amount and relevance of information displayed;

Ease of Use – Evaluates the easiness of accessing the information wanted (based on the number of clicks needed to retrieve information). Thus, relating to the number of separators indicator used in Layout.

Regarding **Functionalities**, the features analysed were:

Age verification – Considering the legal constraint, it was assessed whether or not websites offer an Age Verification system that ensures that visitors are aged above 18. Websites that offered such feature were given a score of 4/5, whereas those who did not were given a score of 2;

E-Shop – Based on the availability of an e-shop on the website, as well as on the easiness of completing a purchase, and the quality of payment system. Websites with an e-shop available were given a 3-5 score;

Newsletter – Considered if there was a newsletter available or not (2 score). Brands that offered a newsletter received a score of 4 or 5, depending on evident is the newsletter placement;

Contact display – Examined whether “online” and “offline” contacts were available, as well as how easy was to retrieve them;

Mobile Optimization – Took into account if the website was mobile optimized (based on Google’s Mobile-Friendly Test) and the manageability of accessing the website via a mobile device. If a website is mobile optimized, a 4/5 score was given while website with no optimization were given a 2 score;

Language Availability – Despite this study focusing solely on the Portuguese market, having a multilingual website was considered favourable. Thus, websites available in Portuguese only scored 3, while multilingual websites scored 4/5.

A detailed analysis of each feature per website considered can be found in Appendix X. With the purpose of simplification of analysis of results, the 1-5 scale was summarized into 3 categories: Underdeveloped Area (features with a score of 1-2), Improvement Opportunity (3-4 score), and Benchmark Reference (5 score).

By analysing the **Image** Results, it comes clear that NAU is one of the bottom performers, averaging 3 out of the 5 possible points, thus leaving sufficient space for improvement across all factors considered. The results are as follows.

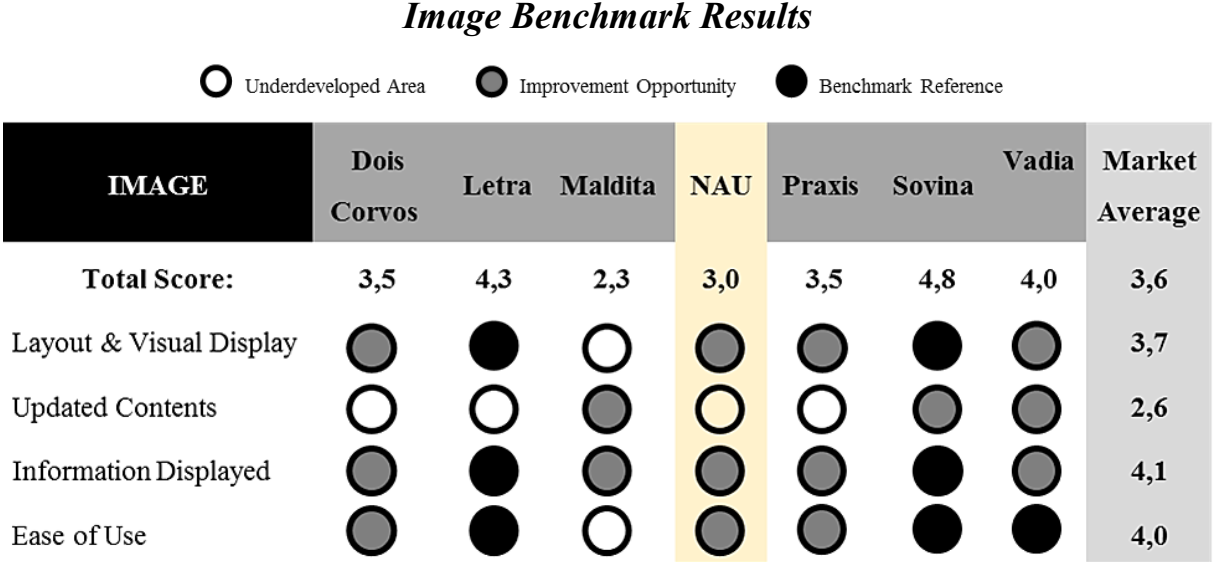


Figure 11: Image Benchmark Results. Source: Benchmark Data

On the other hand, Sovina, Letra stand out as the overall top performs, both rating over 4 points. In both cases, apart from the Updated Contents feature, maximum score in given in all topics under analysis. Thus, being the benchmark references in this category.

Updated Contents is the most underdeveloped area across all websites, as most of them do not have areas that allow for Updated Contents, and those who have tend to not update it with the desired regularity. Lastly, concerning Ease of Use, in the majority of cases, the attributed score is a result of both the Layout and Information Displayed aspects. This meaning, the higher the amount of information, and the higher the amount of visual information, as well as website separators, the lower is the Ease of Use.

## *Functionalities Benchmark Results*

○ Underdeveloped Area
● Improvement Opportunity
● Benchmark Reference

FUNCTIONALITIES	Dois Corvos	Letra	Maldita	NAU	Praxis	Sovina	Vadia	Market Average
<b>Total Score:</b>	3,8	3,3	2,8	2,7	3,3	4,2	2,8	3,3
Age verification	○	●	○	○	○	●	○	2,7
E-Shop	○	●	○	●	○	●	●	3,0
Newsletter	●	○	○	○	○	●	●	3,0
Contact Display	●	●	●	●	●	●	●	3,9
Mobile Optimization	●	○	●	○	●	○	○	3,1
Language Availability	●	●	●	●	●	●	●	4,0

*Figure 12: Functionalities Benchmark Results. Source: Benchmark Data*

Firstly, it is of importance to recognize that a higher number of functionalities serves as an indicator of development (assumption taken). Yet, more functionalities do not imply better performance as, too much functionalities may lead to websites visitors to become overwhelmed. Thus, ease of use (considered above) also reflected the excess of functionalities.

Concerning Language Availability, websites received a score of 3-5, as it was considered that the minimum requirement (score of 3) was to have a website in the Portuguese – the market in analysis.

Under **Functionalities**, NAU is once again one of the bottom performers, not offering an Age Verification system nor Mobile Optimization nor a Newsletter. In addition, the brand only performed above market average on the Contact Display aspect. Sovina, once again, excels, being the top performer of the category.

### *Image/Functionalities Benchmark Matrix*

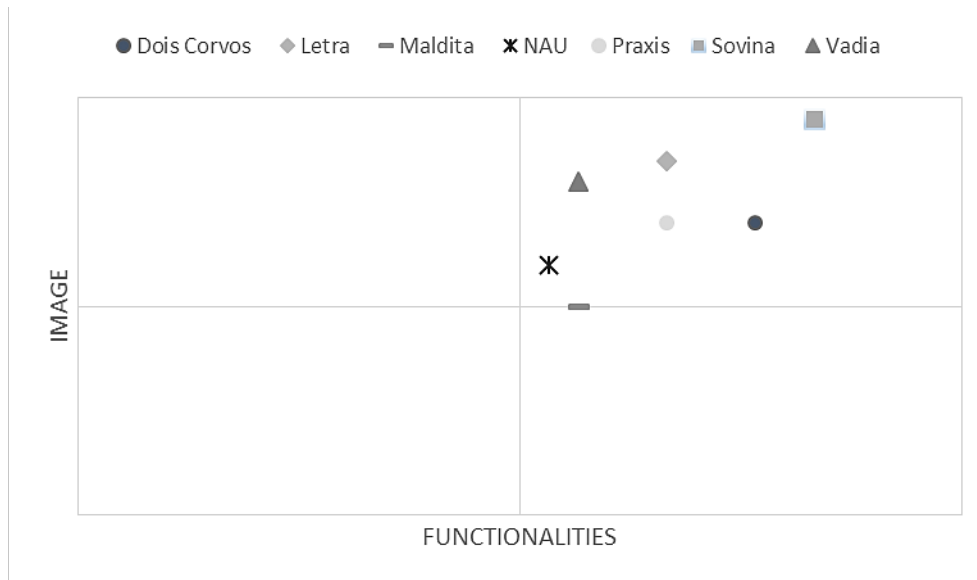


Figure 13: Image/Functionalities Benchmark Matrix. Source: Benchmark Data

As it can be noted, on a global level, Sovina comes across as the best performing SME and as a benchmarking reference, both in terms of Image and Functionalities. Being afterwards followed by Letra, in terms of Image and by Dois Corvos, when considering Functionalities. Maldita has the worst performance concerning Image, whereas NAU is the worst performer regarding Functionalities. On average, companies perform better in Image related factors (MA<sup>4</sup>=3,6) than in aspects linked to Functionalities (MA=3,3).

Also to mention is that, on a total level all brands' websites scored equal or above 2,5 in the two considered categories, Image and Functionalities. However, this is not at all an accurate representation of the Handcrafted Beer market in Portugal since the companies were chosen so as to exemplify the best practices in the Portuguese market under scrutiny.

<sup>4</sup> MA stands for Market Average which in this case is an average of the scores obtained by the Brands analysed

# 5. Conclusions

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At the beginning of this dissertation, four research questions were formulated so as to help NAU with the challenge of developing an online digital marketing strategy. By using information from Literature Review, the Market Research and the Benchmark Analysis, this section intends to answer each of these questions. Thus, this chapter aims at drawing conclusions and recommendations regarding NAU's online strategy providing knowledge about the Portuguese consumers' alcoholic beverages consumption habits and Handcrafted Beer perceptions. This study's limitations were accessed and recommendations for future research were given.

## 5.1. Conclusions and Recommendations

### **What are the alcohol consumption habits of the Portuguese population?**

In this dissertation, it was considered necessary to retrieve information regarding the alcoholic beverages' consumption and purchase habits of the Portuguese consumers, which was done through Market Research. Such study was conducted without differentiating consumption per meal, yet differentiating consumption occasion and location.

In the Focus Groups conducted, a noticeable difference was perceived between participants of the two focus groups. Firstly, younger consumers mentioned to have a less frequent consumption habit, as well as a rather seasonal consumption of alcoholic beverages – consumption is done on a daily-basis in the summer-time, when compared to one to three times per week, during the remaining time of the year. Older participants revealed to drink alcohol between three and ten times, weekly. Additionally, the younger groups seemed to drink mainly Beers and spirits, whereas the older group preferred Wine.

Similarly, the answers collected in the Online Survey revealed that when considering alcoholic beverages participants mainly drink Wine and Beer. Moreover, respondents demonstrated a preference for drinking Wine over Beer (84,6% like Wine - either Red, White or both - when compared to the 76,2% that like Beer). Most respondents are either medium consumers (78,8% of the respondents) or heavy consumers (14,5% of the participants) of alcoholic beverages.

Portuguese consumers drink alcoholic beverages mainly during Parties/Social events (96,1%), Special occasions/Celebrations (82,3%) and Meals out-of-home (65,9%). That is supported by

the places in which consumption usually occurs - Parties (87,5%), Bars/Nightclubs (83,9%), at their friends' houses (82,3%), as well as in Restaurants (79,1%). *Flavour, quality* and *price* are the most valued attributes. Lastly, *temperature of consumption* is a characteristic of high importance for the particular case of some beverages.

Regarding NAU's substitutes/competitors, consumers perceived Beer and Wine to be different in terms of price, consumption occasions and easiness of digestion. Thus, Wine is usually favoured in situations with special significance (Special occasions/Celebrations, Meals out-of-home and Professional occasions) whereas Beer is chosen in moments of higher relaxation and enjoyment. Furthermore, Wine is also perceived as more expensive than Beer, as well as being a more refined (fancier) drink that is drunk mainly in special occasions.

Generally, Portuguese consumers usually drink alcoholic beverages during main social events and special occasions as well as meals out-of-home. In accordance, consumption is mostly done out-of-home. All in all, handcrafted beer has been growing and can eventually become a trend market and become a success like in recent past happened to beverages like Licor Beirão and Gin.

### **How do Portuguese consumers currently perceive NAU?**

To assess and uncover perceptions about NAU and Handcrafted Beer, Keller's CBBE model was applied throughout this study. Thus, brand and market knowledge, including awareness and imagery were assessed.

Firstly, during the entire Market Research, it was evident that there is still a low level of market knowledge, as well as of brand awareness. As previously mentioned, Portugal lacks a Beer tradition that alongside the structural difficulties lived within the country, act as barriers to the development of the Handcrafted Beer Market. In fact, in the Online Survey the majority of respondents had never tried Handcrafted Beer before (54,3%) and only around 20% of the sample 61 respondents was capable of recalling a Portuguese Handcrafted Beer brand.

During the Online Survey, it was uncovered that respondents mainly valued in NAU the fact that the Beer should be drunk cold (78,8% rated 4 or above), as well as the brands' use of natural ingredients (73% rated 4 or above) and Handcrafted methods (69,5% rated 4 or above). Moreover, participants perceived NAU as being of easy digestion (94,9%) and having an attractive image (63,3%). However, 60,8% of the respondents did not perceive it as of high

quality and only 16,4% perceived it as having a pleasant flavour – which may be justifiable by the high preference for lighter beers.

Regarding *occasions of consumption*, it was concluded that Handcrafted Beer follows a pattern rather similar to the one of Beer, as respondents mainly imagine themselves drinking NAU at Parties/Social Events (53,7%), as well as during Special Occasions/Celebrations (48,9%). Besides, 72% of the respondents considered NAU to be a different beverage, when compared to both Wine and Beer. Such uniqueness was also mentioned by participants from the Focus Groups. Lastly, participants that like Beer, as well as participants with higher receptiveness to new products (p-value=0,00 for both) were found to be more willing to try NAU.

As a result, NAU does not benefit from strong levels of awareness nor exclusive associations. Nonetheless, there are a few positive associations that were uncovered during the Market Research that NAU should emphasize when communicating with the target, as its consumption temperature and Handcrafted production methods. However, customers do not perceive NAU as a product of high quality nor of pleasant flavour, associations which the brand should amend.

### **What positioning strategy should NAU follow?**

Being able to create an adequate positioning strategy implies being able to satisfy the needs of the segment targeted. Given so, during the analysis on the answers collected, it was found that main segment to target drinks mainly Beer and champagne, and primarily values *alcohol content* and *flavour*. Moreover, this segmented is highly willing to try both new products and NAU.

Moreover, as it was noted in the Market Research, NAU was considered to be a rather unique and innovative brand, even when in direct comparison with Beer and Wine. In fact, respondents highly agreed with the following statements: NAU is different from other Beer/Wine brands (72,7% and 65,3%, respectively); NAU has different characteristics from Beer/Wine (57,9% and 71,7%, respectively). Thus, and according to Sujan & Bettman (1989), agreement with these sentences is a representation of a subtyping position since a subtyped brand would in general not be like other brands (high level of agreement with *NAU is different from other Beer/Wine brands*) and would have distinguishing features (high level of agreement with *NAU has different characteristics from Beer/Wine*).

A subtyping strategy implies that the brand is not perceived as the typical example of the market, but instead, it is seen as a specialized product which may lead to it being appealing to a more focused market. The reduced level of high interest in NAU (11,6%) corroborates this hypothesis – narrow/niche market. However, given the high level of perceived difference, the brand is also less likely to be substituted for another one. In addition, as concluded by Sujan & Bettman (1989) when several differentiating product features are communicated in a single advertisement, consumers' perceive it as a subtype brand.

Considering what was mentioned above, and the desired positioning, it is clear that NAU can successfully differentiate its brand from the ones that exist currently. Also to be considered is that, given the novelty of the category in the Portuguese market, NAU should focus on leveraging points of parity. This meaning, for an innovative product like NAU it is important to firstly establish POP within the category and not immediately focus on communicate only POD. Otherwise, the brand may be perceived as too different from the customers' current frame of reference. As a result, and to achieve the desired positioning, NAU start by focusing on communicating attributes that will lead to both positive and strong associations, while establishing frame of reference, as mentioned. Moreover, the brand should communicate attributes that are valued by Portuguese consumers, and specifically by the target.

Thus, NAU should start by communicating the fact that it is a Beer, as well as that should be drunk fresh so as to establish its frame of reference. Moreover, keeping in mind the attributes preferred by consumers and valued by the target, but also the subtyping strategy, the brand should emphasize its higher alcohol content level and stronger/pleasant flavour. It is also of importance to establish an image of quality, otherwise the brand will not be able to maintain its premium position. To do so, it is of importance to transmit the idea of this being a Handcrafted Product as it was one the most liked aspect of NAU, while reinforcing the idea of quality, currently not associated to NAU. Lastly, the brand should try to associate itself to Special Occasions and Unique Moments, in which overall consumption is among the highest, while enabling to pass the message of being a more refined and special beverage and simultaneously transmitting an image of higher quality.

Overall, the communication pursued should create brand recognition and awareness while incentivising trial.

**How can NAU improve its online strategy?**

Regarding online strategies, NAU wants to focus mainly on two online channels: Facebook and Website. Despite also having an Instagram account, the founders consider it as almost non-existent considering their scarce activity level in this particular platform.

In summary, in their main online channels, NAU should concentrate on:

FACEBOOK	WEBSITE
<ul style="list-style-type: none"> <li>• Content Creation;</li> <li>• User Engagement;</li> <li>• Invest in SMO.</li> </ul>	<ul style="list-style-type: none"> <li>• Improve Visual Display;</li> <li>• Simplification of buying process;</li> <li>• Allow for Mobile Optimization;</li> <li>• Install an Age Verification System;</li> <li>• Invest in SEO;</li> <li>• Creation of a Newsletter.</li> </ul>

*Figure 14: Improvement Recommendations per Channel. Source: Project Recommendations*

Regarding the first channel, **Facebook**, NAU definitely has to strengthen its MARCOM. Indeed, in its Facebook page, the brand exhibits low levels of interaction (an average of 2 posts per month since the beginning of the year - 2016) which when considering this as NAU’s main marketing tool, justifies the poor levels of brand recognition noticed during the Market Research. Thus, the brand should make an effort to make users aware of their product offering, as well as marketing campaigns and promotions.

Therefore, NAU should create online initiatives that encourage a higher level of user interaction. All in all, in order to be successful online NAU should focus on content creation in their Facebook page. Accordingly, online campaigns as events, discounts and promotions, collaborations with bloggers/vloggers as well as interactive contests are example of initiatives capable of simultaneously generating both. The brand should also use its page to divulge new points of sale, articles in which the brand has been featured, and similar topics of interest to followers.

In what concerns the **Website**, as seen beforehand, there is space for improvements both in terms of Image and Functionalities.

In terms of Image, NAU was the only brand benchmarked whose website was created via a free account. This meaning, the company has a website with a generic domain name (website created in WIX) and when in the landing page, calls-to-action promoting WIX appear. Not only

are these calls-to-action distracting, they may also transmit an unprofessional image, thus diluting the Premium image that NAU wants to establish. Moreover, the images displayed also lacked professional quality, which once again goes against a premium positioning. Lastly, there is no Updated Contents section, which could be used to promote the brand, while divulging latest news and events.

Concerning Functionalities, the most pressing topics relate to NAU's E-shop, as well as the lack of Age Verification system, Mobile Optimization and Newsletter. Firstly, NAU should improve the shopping experience by making the buying process more agile. This meaning, the brand currently offers the possibility to order via the website by using a form that customers need to fill-in. However, such process should be simpler and faster. Particularly, when considering that approximately 20,3% considered the Online/Catalogue channel as appropriate for buying NAU (a rather prominent percentage when compared to the Wine and Beer). Thus, a basic online E-shop, enabling for both direct (Credit card, Paypal) and indirect (ATM) payment should be used.

Furthermore, and as mentioned ensuring that the website is Mobile Optimized should be a priority for NAU as over 50% of the Portuguese internet users nowadays access the internet via tablet or mobile phone (Marktest, 2014). Besides, a subscription-based newsletter should also be introduced so as to guarantee engagement with interested users, as well as to start developing a customer relationship management (CRM) database software that enables customer retention, while driving sales. Last but not least, and when considering that NAU is an alcoholic beverage – whose consumption should be done moderately and only by adults – it is also of interest to create a simple age verification that conveys these messages across to visitors.

Moreover, given that the Website and Facebook are the marketing tools used by NAU, the company should also focus on investing in search engine optimization (SEO) as well as social media optimization (SMO) so as to drive traffic to their online channels. In fact, if one searches online for “Handcrafted Portuguese Beer” on Google, NAU will not appear within the first 10 pages of results – while main competitors as Dois Corvos, Letra, Maldita, Sovina and others appear within the first 2 pages.

As noted in the Literature Review chapter, the Internet can be an extraordinary opportunity, yet NAU is rather undeveloped.

All in all, NAU needs to understand what drives their followers so as to be able to meet their interests and preferences. The proposed initiatives are only recommendations on what to focus on when interacting with the target. Regardless, NAU should constantly update and improve its strategy so as to generate and maintain interest from web-users.

## **5.2. Limitations and Future Research**

Throughout this study, some limitations were found. Firstly, in the Literature Review chapter, an effort was made so as to find relevant and recent articles. However, some of the literature on some of the topics analysed is rather limited, as mentioned by several authors. As a result, some of the cited articles are not as recent as desirable, nor were published in top journals.

Regarding limitations in the Market Research, given the lack of financial incentives, the participants of the focus groups conducted were chosen within my social context, thus resulting in a lack of heterogeneity of answers. When it comes to the survey, despite having gathered a considerable amount of valid responses, the sample is not representative of the Portuguese population - taking into account the Portuguese population aged over 18 years old as NAU's potential target consumers. Thus, some of the results might have been biased due to the higher number of female participants (65,3%), mainly aged between 18 and 24 years old (71,7%) and living in the Metropolitan Area of Lisbon (67,5%). Moreover, the extensive duration time of the survey (duration mean of 32 minutes) lead to a considerable dropout rate of nearly 29%, consequently limiting the number of valid responses. When considering the benchmark analysis, the restricted access to specific company information, lead to a more superficial and generic approach. Lastly, for a company-based view, the inability to measure the investment needed to implement the recommendations, as well as the return on it, is another limitation from this dissertation.

For future research, experimental techniques both in social media and website would allow to test the effectiveness of the suggestions given. Lastly, it would also be of interest to deepen the study of success factors and key performance indicators within the industry, using quantitative data, so as to achieve a more exhaustive analysis of NAU's overall online performance.

# 6. Exhibits

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## Exhibit 1: NAU Beer Bottle & Logo



## Exhibit 2: Focus Group Guideline

*Note: This guideline is a translated version of the original one which was conducted with Portuguese citizens over 18 years old (legal age for purchasing and consuming alcoholic beverages).*

### 1. Warm-up

- Introduction to the research purpose
- Presentation of the participants being interviewed (Name, Age)
- Presentation of the theme research: Consumption of Handcrafted Beers

### 2. Lifestyles

- Where do you live? And with whom?
- What is your Occupation?
- Are you receptive to try new products?

### 3. Alcoholic Beverages consumption habits

- How often do you drink alcoholic beverages? Which ones do you prefer to drink? In what occasions?
- Do you usually drink Wine? If so, what are your favourite brands? In what occasions do you drink it? How frequently?

- Are you a Beer-lover? If so, what are your favourite brands? In what occasions/locations do you drink it? How frequently?
- Have you ever tried a Handcrafted Beer? How often do you drink it? And in what occasions?
- If you had to choose between Beer and Wine, what would you chose?
- Can you imagine yourself drinking Handcrafted instead of other alcoholic beverages? If so, which ones? Why or why not?

#### 4. Alcoholic Beverages purchasing habits

- Where do you usually buy Beer? What about Wine? Have you bought alcoholic beverages online?
- How much do you usually spend on a Beer? What about in Wine?
- Have you ever visited a specialized store of Handcrafted products? What about a Beer/Wine specialty store?

#### 5. Market & Brand Knowledge

- Do you perceive Handcrafted Beer to be more or less expensive than a normal Beer? And about when compared to Wine?
- Do you have any favourite Handcrafted Beer brand? What is it and why?
- Do you have any favourite Wine brand? What is it and why?
- Can you recall any Handcrafted Portuguese Beer brand?
- What attributes do you value the most in an alcoholic beverage? Why? - Flavour, alcohol content, quality, price, convenience, brand, etc.
- Which attributes do you value the most in a Beer? Why? - Flavour, alcohol content, quality, price, convenience, brand, light/heavy, calorie content, etc.
- Which attributes do you value the most in Wine? Why? - Flavour, alcohol content, quality, price, convenience, brand, light/heavy, calorie content, etc.
- From this list of attributes, what are, in your opinion, the 2 most important ones?
- What are, in your opinion, the main differences between Wine and Beer, in terms of attributes?
- All of the attributes mentioned, which ones do you believe a Handcrafted has?
- Do you consider Handcrafted Beer to be closer to Wine or Beer?

## **Brand Awareness**

- Have you ever heard of NAU? Where? (*Introduce NAU, show the bottle & do a taste test*)

### 6. Assess Imagery & Feelings

- What are your first impressions about the brand?
- How attractive do you consider the bottle itself? What about the logo?
- What is the first thing that comes to your mind when I say NAU?
- How would you describe the typical consumer of NAU?
- Do you identify yourself with this brand? Do you consider this brand to be for “people like you”?
- If NAU was a person, how would its personality be like?
- How well do the following words describe NAU: successful; upper-class; charming; daring; modern; down-to-earth; relaxed; festive? Can you think of other similar words that describe NAU?
- What places do you believe to be most appropriate to buy NAU?
- Do you think that you can buy NAU in a lot of places or is it harder to find?

### 7. Assess Judgments & Performance

- What do you think differentiates the brand from others?
- How unique is NAU?
- What is your assessment of the product quality?
- To what extent does NAU fulfil your needs?
- What attributes do you value the most in NAU? - Flavour, alcohol content, quality, price, convenience, brand, light/heavy, calorie content, etc.
- Where do you imagine yourself drinking NAU? On which occasions?
- Do you associate drinking it with special moments? Why or why not?
- How innovative are the founders of NAU?
- Would you buy it? Why, why not?

### 8. End of the session and thank you note

- If you have any additional comments, questions or ideas to share feel free to do so.

### **Exhibit 3: Online Survey Guideline**

*Note: This survey is a translated version of the original survey which was launched in Portuguese for citizens over the age of 18 years old (legal age for purchasing and consuming alcoholic beverages).*

#### 1. Introduction

My name is Joana Rosa and I am conducting this study for my Master Thesis at Católica Lisbon School of Business and Economics. The aim of this study is to understand the perceptions, opinions and consumption habits of the Portuguese consumers regarding alcoholic beverages, and particularly Handcrafted Beer. Given so, please continue only if you are **over 18 years old**.

All the answers will be recorded anonymously and will only be used for this specific study. Please remember that there are no right/wrong answers, so be as honest as possible. Your contribution and honesty will be of extreme importance for the success of my thesis. Thank you in advance for your collaboration and time spent to complete this survey!

#### 2. Lifestyles and Consumption Habits

**Q1:** Are you 18 years old or more?

- Yes
- No

If No Is Selected, Then Skip to End of Survey

**Q2:** Do you like alcoholic drinks?

- Yes
- No

If No Is Selected, Then Skip to End of Survey

**Q3:** Which type of alcoholic beverages do you usually drink? (You may select more than 1 option)

- Wine
- Beer
- Cider
- Champagne
- Gin

- Spirits
- Liqueurs
- Others

**Q4:** How often do you drink alcoholic beverages?

- 1 to 2 times a year
- 3 to 5 times a year
- 1 to 2 times a month
- 1 to 2 times a week
- 3 to 5 times a week
- More than 6 times a week

**Q5:** On which occasions do you consume alcoholic drinks? (You may select more than 1 option)

- Meals at-home
- Meals out-of-home
- Parties / Social events
- Special occasions / Celebrations
- Professional occasions
- Sunsets / Happy hours
- Others

**Q6:** Where do you usually drink alcoholic beverages? (You may select more than 1 option)

- At home
- Restaurants
- Bars/Nightclubs
- Parties
- At my Friends' houses
- Others

**Q7:** Which characteristics do you take into consideration the most when you drink alcoholic beverages? (Please classify according to its importance – the total should be equal to 100%)

\_\_\_\_\_ Alcoholic content

\_\_\_\_\_ Price

- \_\_\_\_\_ Quality
- \_\_\_\_\_ Brand
- \_\_\_\_\_ Flavour
- \_\_\_\_\_ Calories

**Q8:** Are you receptive to try new products?

- Highly receptive
- Somehow receptive
- Little/No receptive

### 3. Beer Consumption Habits

**Q9:** Do you like Beer?

- Yes
- No

If No Is Selected, Then Skip to End of Block

**Q10:** On which occasions do you drink Beer? (You may select more than 1 option)

- Meals at home
- Meals out of home
- Parties / Social events
- Special occasions / Celebrations
- Professional occasions
- Sunsets / Happy hours
- Others

**Q11:** Where do you usually buy Beer? (You may select more than 1 option)

- Restaurants
- Cafes
- Supermarkets
- Bars/Nightclubs
- Specialty shops (Breweries, Gourmet Stores,...)
- Online/ Catalogue

**Q12:** Please indicate to what extent you agree with the following sentences related to Beer.

*Scale: Totally Disagree; Partially Disagree; Partially Agree; Totally Agree, Don't have an opinion*

- Beer has a pleasant Flavour.
- Beer is expensive.
- Beer is a fancy drink.
- I drink Beer mainly in relaxing moments.
- If you are paying attention please select the option “Don't have an opinion”.
- I enjoy drinking Beer.
- I have a preference for darker Beers.
- Beer is my first choice in alcoholic drinks.
- I take into consideration the potential health risks associated with Beer consumption.
- Beer is difficult to digest.
- I drink Beer mainly on special occasions.

#### 4. Wine Consumption Habits

**Q13:** Do you like Wine?

- Yes
- Yes, red Wine only
- Yes, white Wine only
- No

If No Is Selected, Then Skip to End of Block

**Q14:** On which occasions do you drink Wine? (You may select more than 1 option)

- Meals at home
- Meals out of home
- Parties / Social events
- Special occasions / Celebrations
- Professional occasions
- Sunsets / Happy hours
- Others

**Q15:** Where do you usually buy Wine? (You may select more than 1 option)

- Restaurants
- Cafes
- Supermarkets
- Bars/Nightclubs
- Specialty shops (Wineries, Gourmet shops,...)
- Online/ Catalogue

**Q16:** Please indicate to what extent you agree with the following sentences related to Wine.

*Scale: Totally Disagree; Partially Disagree; Partially Agree; Totally Agree, Don't have an opinion*

- Wine has a pleasant Flavour.
- Wine is expensive.
- Wine is a fancy drink.
- I drink Wine mainly in relaxing moments.
- I enjoy drinking Wine.
- Wine is my first choice in alcoholic drinks.
- I take into consideration the potential health risks associated with Wine consumption.
- Wine is difficult to digest.
- I drink Wine mainly on special occasions.

#### 5. Handcrafted Beer

**Q17:** Have you ever tried Handcrafted Beer?

- Yes
- No
- No, but I would be willing to try

**Q18:** Do you know any brand of Handcrafted Portuguese Beer? If so, please write which one(s).

## 6. NAU Beer

**Q19:** Have you ever heard of NAU?

- Yes
- No

If No is Selected Skip to End of Bock

**Q20:** Where did you first hear about NAU?

- Friends
- Family
- Social networks
- Restaurant
- Gourmet Shop
- Other

## 7. Presentation of NAU Beer

NAU is a 100% Portuguese Handcrafted Beer, produced with traditional processes with 100% natural ingredients. It arose from the will of three young entrepreneurs who wanted to create a Beer that could be tasted as a Wine before, during and after a meal. Its alcoholic level is of 10% and it should be drunk cold.



**Q21:** What do you most like in NAU? (Give from 1 to 5 stars)

- Name: NAU
- Higher alcoholic level (10%)
- Packaging: bottle
- Colours: black and gold
- Colour of the Beer
- Should be drunk cold
- Handcrafted production
- Natural ingredients

**Q22:** Which characteristics do you associate the most with NAU? (You may select more than 1 option)

- High price
- Difficult digestion
- Attractive image
- High quality
- Pleasant flavour

**Q23:** On which occasions do you imagine yourself drinking NAU? (You may select more than 1 option)

- Meals at home
- Meals out of home
- Parties / Social events
- Special occasions / Celebrations
- Professional occasions
- Sunsets / Happy hours
- Others

**Q24:** Which places do you find more appropriate to buy NAU? (You may select more than 1 option)

- Restaurants
- Cafes
- Supermarkets
- Bars/Nightclubs
- Specialty Stores
- Online/ Catalogue

**Q25:** If NAU was a person, how would its personality be?

- Modern
- Attractive
- Relaxed
- Successful
- Charming
- Young

- Upper class
- Hard worker
- Cool/Trendy
- Realistic
- Innovative
- Nice

**Q26:** Please select, bearing in mind your opinion, to what extent NAU corresponds to the following sentences.

*Scale: Totally Disagree; Partially Disagree; Partially Agree; Totally Agree, Don't have an opinion*

- An innovative brand.
- A brand for people like me.
- A brand that fits my social values.
- A brand that differentiates itself from other Beer brands.
- A drink for special occasions.
- A brand that I relate to.
- A drink with different characteristics from Wine.
- A drink to share.
- A brand that differentiates itself from other Wine brands.
- A drink to offer as a gift.
- A drink with different characteristics from Beer.
- A different drink.

**Q27:** Would you be interested in buying one bottle of NAU?

- Highly interested
- Somehow interested
- Little interested
- Zero interest

8. Demographic characteristics

**Q28:** Gender

- Female
- Male

**Q29:** Age

- 18 - 24 years old
- 25 - 34 years old
- 35 - 44 years old
- 45 – 35 years old
- >= 55 years old

**Q30:** Occupation

- Unemployed
- Student
- Employed
- Retired

**Q31:** Monthly income

- < €500
- €500 - €999
- €1000 - €1499
- €1500 - €1999
- €2000 - €2499
- >= €2500

**Q32:** Where do you live?

- North
- Centre
- Lisbon Metropolitan Area
- Alentejo
- Algarve
- Azores
- Madeira

**Q33:** Please feel free to leave any suggestion or opinion in the space below. Also, if you have any question, please leave your email address and I will get back to you.

Thank you for your participation! **End of survey.**

## Exhibit 4: Initial Benchmark Analysis

### Exhibit 4.1: Initial Benchmark Analysis – Online Presence

	Online Presence								
	E-mail			Social Media			Website		
	Personal	Generic	Corporate	Facebook	Instagram	Others	Coming Soon/ Unavailable	Online Contact Form	Available
5 e Meio			X	X					X
5 F's		X		X					
7Mares			X	X			X		
A Cabra				X		X			
A Mistica		X		X					
Acelera Vacas				X					
Afonso		X		X					
Against The Tide				X					
Agulusa Cascais Brewery			X	X			X		
Alma			X	X			X		
Annésia Brewery	X			X	X	X		X	
Amphora		X		X					X
Arcias		X		X					
Arocira			X	X			X		
Arrábida Beer Company			X	X			X		
Art Beer				X			X		
Balluta			X	X			X		
Barona		X		X				X	
Beer John			X	X			X		
Bode				X					
Bolina			X	X					X
Bordallo		X		X				X	
Brianda				X					
Buja			X	X					X
Burguesa			X	X			X		
Buri	X			X			X		
Burra		X		X			X		
Calmeirona			X	X			X		
Capela dos Excomungados									
Celinda		X		X					
Celtas			X	X	X				X
Cinco Chagas			X	X			X		
Colossus			X	X					
Dá Cadela		X		X					
Deck Beer Lab			X	X		X			X
Deusa			X	X					X
D'os Diabos			X	X			X		
D'Ourique			X	X					X
D'Ouro Beer		X		X					
Dois Corvos			X	X		X			X
Dúbia		X		X					
DUX Beer			X	X					X
Ermida				X			X		
Farol		X		X					X
Folk				X					
Freixo Beer	X			X					
Gala		X		X					
Galdéria				X		X	X		
Gandula		X		X					
Giria			X	X			X		
Irmãdade da Cerveja		X		X			X		
Keltikia			X	X					
Lenda				X					
Letra			X	X					X
Lindinha Lucas			X	X					
Lucey				X			X		
Lusa				X					
Luzia		X		X			X		
Maldita			X	X		X			X
Marafada		X		X					
Maruja									
Mártir		X		X					
Mean Sardine		X		X		X			
Mediaevalis			X	X					X
Melo Abreu							X		
Mirandum									
Moura			X	X					X
Mouzinha				X					
Musa			X	X			X		
Nau		X		X	X				X
Oeste			X	X					X
Oficina de Espiritos		X		X					
Oitava Colina			X	X	X	X			X
OPO74			X	X	X				X
Passarola Brewing			X	X		X			X
Post Scriptum Brewery			X	X	X				X
Praxis		X		X		X			X
Rapada		X		X					X
Régia		X		X					X
Rey				X					
Rolls Beer			X	X					
Samarra				X					
San'tiago		X		X					
Sant'Ana LX Brewery		X		X			X		
Sarti				X		X			
Saudade				X					
Sovina	X			X	X	X			X
Survia				X					
Templária				X					
Templarum				X					
Toira			X	X	X	X			X
Uma			X	X					X
Vadia			X	X		X			X
Villa Guinata		X		X	X				
Vitória		X		X			X		
Vitriol		X		X					
Xanga		X		X					
Zurrapa		X		X		X			

## Exhibit 4.1: Initial Benchmark Analysis – Online Sales Channels & Market Recognition

	Online Sales Channels				Market Recognition		
	Website		Social Media		3rd-party retailer	Awards	
	Coming Soon/ Unavailable	Available	Coming Soon/ Unavailable	Available		National	International
5 e Meio	X					X	
5 F's							
7Mares							
A Cabra							
A Mística							
Acelera Vacas			Information not available			Information not available	
Afonso							
Against The Tide							
Agualusa Cascais Brewery							
Alma							
Amnésia Brewery						X	
Amphora					X		
Areias					X		
Aroeira					X	X	
Arrábida Beer Company							
Art Beer							
Balluta			X				
Barona							
Beer John							
Bode							
Bolina		X		X	X		
Bordallo							
Brianda							
Buja		X					
Burguesa			X		X		
Buri							
Burra							
Calmeirona							
Capela dos Excomungados			Information not available			Information not available	
Celinda							
Celtas		X		X			
Cinco Chagas					X		
Colossus					X		
Dá Cadela							
Deck Beer Lab			X				
Deusa							X
D'os Diabos					X	X	
D'Ourique		X					
D'Ouro Beer							
Dois Corvos					X	X	X
Dúbia							
DUX Beer							
Ermida							
Farol							
Folk							
Freixo Beer							
Gala							
Galdéria							
Gandula							
Gíria							
Irmãdade da Cerveja							
Keltikia							
Lenda							
Letra		X		X	X	X	
Lindinha Lucas							
Lucy							
Lusa							
Luzia							
Maldita					X		X
Marafada							
Maruja			Information not available			Information not available	
Mártir							
Mean Sardine					X	X	
Mediaevalis		X			X		
Melo Abreu							
Mirandum			Information not available			Information not available	
Moura							
Mouzinha							
Musa		X				X	
Nau		X					
Oeste							
Oficina de Espiritos							
Oitava Colina		X				X	
OPO74					X	X	
Passarola Brewing					X	X	
Post Scriptum Brewery					X	X	
Praxis		X					
Rapada							
Régia					X		
Rev							
Rolls Beer							
Samarra							
San'tiago							
Sant'Ana LX Brewery							
Sarti							
Saudade							
Sovina		X			X		
Survia							
Templária							
Templarum							
Toira							
Uma							
Vadia		X			X	X	X
Villa Guinata							
Vitória						X	
Vitriol							
Xanga	X				X		
Zurrapa							

## Exhibit 5: SPSS Outputs regarding Demographic Factors

### Exhibit 5.1. Frequency Table – Demographic Factors (constructed on Excel)

Demographic Factors								
Gender	%	311	Occupation	%	311	Residence	%	311
Female	65,3%	203	Unemployed	2,3%	7	North	1,6%	5
Male	34,7%	108	Student	59,2%	184	Center	28,9%	90
Age	%	311	Employed	37,6%	117	Lisbon Metropolitan Area	67,5%	210
18-24	71,7%	223	Retired	1,0%	3	Alentejo	1,3%	4
25-34	8,0%	25	Income	%	311	Algarve	0,6%	2
35-44	6,8%	21	< 500€	49,8%	155	Azores	-	0
45-54	9,3%	29	500€ - 999€	20,9%	65	Madeira	-	0
> 55	4,2%	13	1000€ - 1499€	12,2%	38			
			1500€ - 1999€	8,0%	25			
			2000€ - 2499€	2,6%	8			
			>= 2500€	6,4%	20			

### Exhibit 5.2. Crosstabulation - Age \* Gender

Count

		Gender		Total
		Female	Male	
Age	18-24	146	77	223
	25-34	13	12	25
	35-44	13	8	21
	45-54	22	7	29
	>=55	9	4	13
Total		203	108	311

### Exhibit 5.3. Crosstabulation - Age \* Monthly Income

Count

		Monthly_Income					Total	
		<500€	500-900€	1000-1499€	1500-1999€	2000-2499€		>=2500€
Age	18-24	147	50	19	4	2	1	223
	25-34	2	8	6	6	1	2	25
	35-44	4	2	8	2	2	3	21
	45-54	1	4	5	8	2	9	29
	>=55	1	1	0	5	1	5	13
Total		155	65	38	25	8	20	311

### Exhibit 5.4. Crosstabulation - Occupation \* Monthly Income

Count

		Monthly_Income					Total	
		<500€	500-900€	1000-1499€	1500-1999€	2000-2499€		>=2500€
Occupation	Unemployed	6	0	1	0	0	0	7
	Student	146	27	9	1	1	0	184
	Employed	3	37	28	22	7	20	117
	Retired	0	1	0	2	0	0	3
Total		155	65	38	25	8	20	311

## Exhibit 6: SPSS Outputs regarding Alcoholic Beverages Habits & Perceptions

### Exhibit 6.1. Descriptive Statistics – Alcoholic Beverages Consumption

	N	Minimum	Maximum	Mean	Std. Deviation
Wine	234	1	1	1,00	,000
Beer	222	1	1	1,00	,000
Cider	149	1	1	1,00	,000
Champagne	101	1	1	1,00	,000
Gin	178	1	1	1,00	,000
Spirits	159	1	1	1,00	,000
Liqueurs	85	1	1	1,00	,000
Others	24	1	1	1,00	,000
Valid N (listwise)	8				

### Exhibit 6.2. Frequency Table – Alcoholic Beverages Consumption Frequency

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid 1 to 2 times a year	2	,6	,6	,6
3 to 5 times a year	19	6,1	6,1	6,8
1 to 2 times a month	107	34,4	34,4	41,2
1 to 2 times a week	138	44,4	44,4	85,5
3 to 5 times a week	36	11,6	11,6	97,1
More than 6 times a week	9	2,9	2,9	100,0
Total	311	100,0	100,0	

### Exhibit 6.3. Descriptive Statistics – Alcoholic Beverages Consumption Occasion

	N	Minimum	Maximum	Mean	Std. Deviation
Meals_Home	109	1	1	1,00	,000
Meals_OutOfHome	205	1	1	1,00	,000
Parties	299	1	1	1,00	,000
Celebrations	256	1	1	1,00	,000
Professional	36	1	1	1,00	,000
Sunsets	147	1	1	1,00	,000
Other_Occasions	21	1	1	1,00	,000
Valid N (listwise)	5				

### Exhibit 6.4. Descriptive Statistics – Alcoholic Beverages Purchase Location

	N	Minimum	Maximum	Mean	Std. Deviation
Home	165	1	1	1,00	,000
Restaurants	246	1	1	1,00	,000
Bars	261	1	1	1,00	,000
Party	272	1	1	1,00	,000
Friends	256	1	1	1,00	,000
Other_Places	21	1	1	1,00	,000
Valid N (listwise)	16				

**Exhibit 6.5. Crosstabulation – Consumption Frequency \* Consumption Occasion**

	Cases					
	Valid		Missing		Total	
	N	Percent	N	Percent	N	Percent
Consumption_Frequency * Meals_Home	109	35,0%	202	65,0%	311	100,0%
Consumption_Frequency * Meals_OutOfHome	205	65,9%	106	34,1%	311	100,0%
Consumption_Frequency * Parties	299	96,1%	12	3,9%	311	100,0%
Consumption_Frequency * Celebrations	256	82,3%	55	17,7%	311	100,0%
Consumption_Frequency * Professional	36	11,6%	275	88,4%	311	100,0%
Consumption_Frequency * Sunsets	147	47,3%	164	52,7%	311	100,0%
Consumption_Frequency * Other_Occasions	21	6,8%	290	93,2%	311	100,0%

**Exhibit 6.6. Descriptive Statistics – Which attributes do respondents value most in alcoholic beverages?**

	N	Minimum	Maximum	Mean	Std. Deviation
Content	308	0	80	8,54	11,294
Price	311	0	100	20,88	15,711
Quality	311	0	100	26,08	17,953
Brand	310	0	50	9,01	9,428
Flavour	311	0	100	32,21	19,766
Calories	310	0	50	3,39	6,928
Valid N (listwise)	307				

**Exhibit 6.7. Frequency Table – Receptiveness to trying new products**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	High	120	38,6	38,6	38,6
	Medium	172	55,3	55,3	93,9
	Low/None	19	6,1	6,1	100,0
	Total	311	100,0	100,0	

## Exhibit 7: SPSS Outputs regarding Beer and Wine Habits & Perceptions

### Exhibit 7.1. Frequency Table – Do respondents like Beer?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Yes	237	76,2	76,2	76,2
No	74	23,8	23,8	100,0
Total	311	100,0	100,0	

### Exhibit 7.2. Frequency Table – Do respondents like Wine?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Yes	183	58,8	58,8	58,8
Red	18	5,8	5,8	64,6
White	62	19,9	19,9	84,6
No	48	15,4	15,4	100,0
Total	311	100,0	100,0	

### Exhibit 7.3. Crosstabulation – Consumption Frequency \* Respondents that Like Beer

Count

		Beer	Total
		1	
Consumption_Frequency	3 to 5 times a year	6	6
	1 to 2 times a month	63	63
	1 to 2 times a week	111	111
	3 to 5 times a week	34	34
	More than 6 times a week	8	8
Total		222	222

### Exhibit 7.4. Crosstabulation – Consumption Frequency \* Respondents that Like Wine

Count

		Wine	Total
		1	
Consumption_Frequency	3 to 5 times a year	6	6
	1 to 2 times a month	72	72
	1 to 2 times a week	115	115
	3 to 5 times a week	32	32
	More than 6 times a week	9	9
Total		234	234

### Exhibit 7.5. Descriptive Statistics – Beer: Occasion of Consumption

	Beer_Meals_Home	Beer_Meals_OutOfHome	Beer_Parties	Beer_Celebrations	Beer_Professional	Beer_Sunsets	Beer_Other
N Valid	67	149	200	139	26	149	22
Missing	244	162	111	172	285	162	289

**Exhibit 7.6. Descriptive Statistics – Wine: Occasion of Consumption**

		Meals at-home	Meals out-of-home	Parties	Celebrations	Professional	Sunsets	Others
N	Valid	154	207	181	199	55	58	14
	Missing	157	104	130	112	256	253	297

**Exhibit 7.7. Descriptive Statistics – Beer: Where do respondents buy Beer?**

		Restaurants	Cafes	Supermarkets	Bars	Specialty Stores	Online/Catalog
N	Valid	137	142	161	159	33	2
	Missing	174	169	150	152	278	309

**Exhibit 7.8. Descriptive Statistics – Wine: Where do respondents buy Wine?**

		Restaurants	Cafes	Supermarkets	Bars	Specialty Stores	Online/Catalog
N	Valid	195	27	218	28	97	7
	Missing	116	284	93	283	214	304

**Exhibit 7.9. Frequency Table – Degree of Agreement with statements about Beer and Wine (adapted on Excel)**

	Totally		Partially		Partially		Totally		No	
	Beer	Wine	Beer	Wine	Beer	Wine	Beer	Wine	Beer	Wine
Pleasant Flavour.	1,3%	1,1%	5,5%	3,0%	29,5%	40,7%	63,3%	55,1%	0,4%	0,0%
It is expensive.	43,9%	2,7%	44,7%	32,3%	11,0%	52,5%	0,0%	11,4%	0,4%	1,1%
It is a fancy drink.	22,8%	1,1%	46,0%	2,3%	26,2%	42,6%	2,1%	53,2%	3,0%	0,8%
I drink it mainly in relaxing moments.	1,7%	4,2%	3,0%	11,8%	23,2%	39,2%	71,3%	44,5%	0,8%	0,4%
I enjoy drinking it.	0,8%	1,1%	3,0%	4,6%	27,8%	36,1%	67,9%	57,4%	0,4%	0,8%
It is my first choice in alcoholic drinks.	26,2%	22,8%	26,6%	29,7%	28,7%	23,2%	17,7%	22,8%	0,8%	1,5%
I take into consideration the potential health risks associated with its	19,0%	17,5%	23,2%	17,9%	29,1%	34,2%	23,6%	27,0%	5,1%	3,4%

consumption.											
It is difficult to digest.	21,1%	27,0%	39,7%	42,2%	26,6%	18,3%	5,9%	4,2%	6,8%	8,4%	
I drink it mainly on special occasions.	22,8%	4,9%	32,1%	18,6%	27,4%	36,9%	16,5%	39,2%	1,3%	0,4%	

**Exhibit 7.10. POP & POD – Degree of Agreement with statements about Beer and Wine**  
(adapted on Excel)

Beer vs. Wine	
It has a pleasant flavour.	
It is an expensive beverage.	Wine > Beer
It is a fancy beverage.	Wine > Beer
I drink mainly in relaxing moments.	Beer > Wine
I enjoy drinking it.	
My first choice in alcoholic drinks.	
I take into consideration the potential health risks associated with Wine consumption.	
It is difficult to digest.	Wine > Beer
I drink it mainly on special occasions.	Wine > Beer

Difference was NOT statistically significant     Difference was statistically significant

**Exhibit 7.11. Frequency Table - Degree of Agreement with “I prefer darker beers”**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Totally Disagree	137	44,1	57,8	57,8
	Partially Disagree	49	15,8	20,7	78,5
	Partially Agree	15	4,8	6,3	84,8
	Totally Agree	13	4,2	5,5	90,3
	No Opinion	23	7,4	9,7	100,0
	Total	237	76,2	100,0	
Missing	System	74	23,8		
Total		311	100,0		

## Exhibit 8: SPSS Outputs regarding Handcrafted Beers & the Brand NAU

### Exhibit 8.1. Frequency Table – Have respondents ever tried Handcrafted Beer?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Yes	142	45,7	45,7	45,7
No	113	36,3	36,3	82,0
No, but I would like to	56	18,0	18,0	100,0
Total	311	100,0	100,0	

### Exhibit 8.2. Frequency Table – Have respondents ever heard of NAU?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Yes	58	18,6	18,6	18,6
No	253	81,4	81,4	100,0
Total	311	100,0	100,0	

### Exhibit 8.3. Frequency Table – Where have respondents first heard about NAU?

	Frequency	Percent	Valid Percent	Cumulative Percent
Valid Friends	29	9,3	50,0	50,0
Family	6	1,9	10,3	60,3
Social Media	14	4,5	24,1	84,5
Restaurant	2	,6	3,4	87,9
Specialty Store	3	1,0	5,2	93,1
Others	4	1,3	6,9	100,0
Total	58	18,6	100,0	
Missing System	253	81,4		
Total	311	100,0		

### Exhibit 8.4. Frequency Table – Which features did respondents liked the most in NAU (1 to 5 stars)? (adapted on Excel)

	Count	%
Name: NAU	34	10,9%
	50	16,1%
	93	29,9%
	72	23,2%
	62	19,9%
Higher alcoholic level (10%)	63	20,3%
	62	19,9%
	95	30,5%
	62	19,9%
	29	9,3%
Packaging: bottle	12	3,9%
	25	8,0%
	74	23,8%
	114	36,7%
	86	27,7%
Colours: black and gold	19	6,1%
	24	7,7%
	66	21,2%

	4	105	33,8%
	5	97	31,2%
Colour of the Beer	1	51	16,4%
	2	47	15,1%
	3	96	30,9%
	4	71	22,8%
	5	46	14,8%
Should be drunk cold	1	11	3,5%
	2	9	2,9%
	3	46	14,8%
	4	81	26,0%
	5	164	52,7%
Handcrafted production	1	14	4,5%
	2	24	7,7%
	3	57	18,3%
	4	83	26,7%
	5	133	42,8%
Natural Ingredients	1	10	3,2%
	2	21	6,8%
	3	53	17,0%
	4	72	23,2%
	5	155	49,8%

**Exhibit 8.5. Descriptive Statistics – Which characteristics did respondents associate most with NAU?**

		High price	Difficult digestion	Attractive image	High quality	Pleasant Taste
N	Valid	121	16	197	122	51
	Missing	190	295	114	189	260

**Exhibit 8.6. Crosstabulation – Preference for Darker Beer \* Interest in buying NAU**

		Interest in NAU				Total
		High	Some	Little	No	
Prefer darker beer.	Totally Disagree	15	68	46	8	137
	Partially Disagree	13	28	6	2	49
	Partially Agree	3	8	4	0	15
	Totally Agree	2	6	3	2	13
	No opinion	2	14	7	0	23
Total		35	124	66	12	237

**Exhibit 8.7. Descriptive Statistics – Where did respondents imagine themselves drinking NAU?**

		Meals at-home	Meals out-of-home	Parties	Celebrations	Professional	Sunsets	Others
N	Valid	63	111	167	152	36	121	18
	Missing	248	200	144	159	275	190	293

**Exhibit 8.8. Descriptive Statistics – Which places did respondents considered more appropriate to buy NAU?**

		Restaurants	Cafes	Supermarkets	Bars	Specialty	Online
N	Valid	167	67	161	96	224	63
	Missing	144	244	150	215	87	248

**Exhibit 8.9. Descriptive Statistics – Degree of agreement with statements about NAU**

		Count
An innovative brand.	Totally Disagree	9
	Partially Disagree	28
	Partially Disagree	150
	Totally Agree	87
	No Opinion	37
A brand for people like me.	Totally Disagree	46
	Partially Disagree	67
	Partially Disagree	113
	Totally Agree	32
	No Opinion	53
A brand that fits my social values.	Totally Disagree	26
	Partially Disagree	42
	Partially Disagree	127
	Totally Agree	44
	No Opinion	72
A brand that differentiates itself from other Beer brands.	Totally Disagree	7
	Partially Disagree	30
	Partially Disagree	118
	Totally Agree	108
	No Opinion	48
A drink for special occasions.	Totally Disagree	9
	Partially Disagree	31
	Partially Disagree	133
	Totally Agree	100
	No Opinion	38
A brand that I relate to.	Totally Disagree	41
	Partially Disagree	61
	Partially Disagree	93
	Totally Agree	33
	No Opinion	83
A drink with different characteristics from Wine.	Totally Disagree	1
	Partially Disagree	15
	Partially Disagree	112
	Totally Agree	111
	No Opinion	72
A drink to share.	Totally Disagree	8
	Partially Disagree	27
	Partially Disagree	111
	Totally Agree	107
	No Opinion	58
A brand that differentiates itself from other Wine brands.	Totally Disagree	9
	Partially Disagree	15
	Partially Disagree	97
	Totally Agree	106
	No Opinion	84

A drink to offer as a gift.	Totally Disagree	23
	Partially Disagree	41
	Partially Disagree	102
	Totally Agree	101
A drink with different characteristics from Beer.	No Opinion	44
	Totally Disagree	11
	Partially Disagree	41
	Partially Disagree	128
A different drink.	Totally Agree	52
	No Opinion	79
	Totally Disagree	7
	Partially Disagree	24
	Partially Disagree	128
	Totally Agree	96
	No Opinion	56

**Exhibit 8.10. Descriptive Statistics – If NAU was a person, how would its personality be like?**

**NAU as a person**

		Modern	Attractive	Relaxed	Successful	Charming	Young	Upper class	Hardworker	Cool	Realistic	Innovative	Nice
N	Valid	110	88	45	106	91	40	139	17	99	17	101	34
	Missing	201	223	266	205	220	271	172	294	212	294	210	277

**Exhibit 8.11. Frequency Table –Interest in buying NAU**

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	High	36	11,6	11,6	11,6
	Some	146	46,9	46,9	58,5
	Low	100	32,2	32,2	90,7
	No	29	9,3	9,3	100,0
	Total	311	100,0	100,0	

**Exhibit 8.12. Crosstabulation – Liking Beer \* Interest in NAU**

		Interest in NAU				Total
		High	Some	Little	No	
Like Beer	Yes	35	124	66	12	237
	No	1	22	34	17	74
Total		36	146	100	29	311

**Exhibit 8.13. Crosstabulation – Receptiveness to new products \* Interest in NAU**

		Interest in NAU				Total
		High	Some	Little	No	
Receptiveness	High	23	59	30	8	120
	Medium	13	83	59	17	172
	Low/None	0	4	11	4	19
Total		36	146	100	29	311

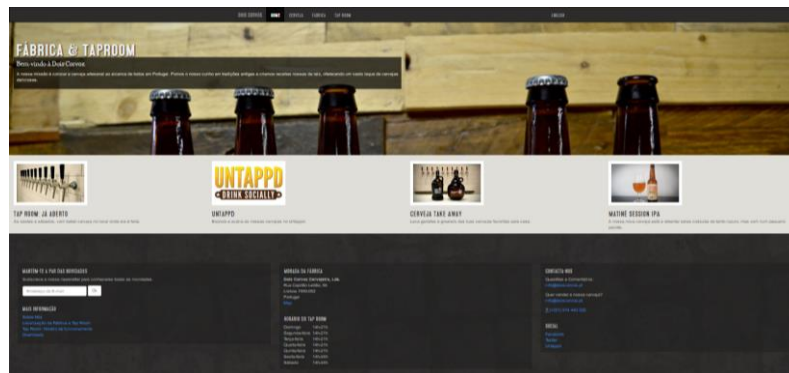
## Exhibit 9: Detailed Benchmark Analysis – Websites

### Exhibit 9.1: NAU's Website



### Exhibit 9.2: Competitors' Websites

#### DOIS CORVOS



#### LETRA



## MALDITA



## PRAXIS



## SOVINA



## VADIA



**Exhibit 9.3: Detailed Benchmark Analysis – Image & Functionalities**

NAU	
Image	Functionalities
<p><u>Layout &amp; Visual Display:</u> In NAU’s website a clean and simple layout is used. Moreover, there are 7 main separators presented. Under some separators, other related topics are presented, totalling 10 partitions in the website. Regarding the quality of images displayed, the lack of professional quality is noticeable in most pictures.</p> <p><u>Updated Contents:</u> There are no areas in which contents are updated.</p> <p><u>Information Displayed:</u> In the website a medium amount of information is displayed. In terms of clarity of the information displayed, little information is displayed in a schematic format (bullet points). Information is mostly about the company and Handcrafted Beer, as well as some foodpairing.</p> <p><u>Ease of Use:</u> Moderate ease of use given the interconnected of some separators.</p>	<p><u>Age verification:</u> NAU website has no age verification system.</p> <p><u>E-Shop:</u> A very basic version is available as it is possible to order via website by using a form available in the website. Thus completing the purchase is not a straightforward and easy process. There is also no online payment system available.</p> <p><u>Contact display:</u> The company’s contacts are displayed at the bottom of all pages of the website, alongside the contacts of some of the most renowned commercial partners.</p> <p><u>Mobile optimization:</u> It is possible to access the website via mobile even though the website is not mobile optimized. Nonetheless, navigation on the website via mobile is still feasible.</p> <p><u>Language Availability:</u> NAU’s website is only available in Portuguese.</p>
DOIS CORVOS	
Image	Functionalities
<p><u>Layout &amp; Visual Display:</u> Regarding images displayed, they are of professional quality. The website has a more intricate design, yet making use of less tabs - there are only 4 main separators.</p> <p><u>Updated Contents:</u> There are no areas in which contents are updated.</p> <p><u>Information Displayed:</u> In the website a medium amount of information is displayed, mainly in a schematic format. Information displayed concerns the brand and its factory.</p>	<p><u>Age verification:</u> The website has no age verification system.</p> <p><u>E-Shop:</u> It is not possible to buy the Beer via website.</p> <p><u>Contact display:</u> The company’s contacts are displayed in all pages of the website. Nonetheless, social media icons are not available.</p> <p><u>Mobile optimization:</u> The website is also mobile optimized.</p>

<u>Ease of Use:</u> The website is rather user-friendly given the low level of separators.	<u>Language Availability:</u> The website available in both Portuguese and English.
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LETRA	
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Image	Functionalities
<p><u>Layout &amp; Visual Display:</u> The website has a rather clean design and making use of 4 main tabs being the pictures displayed of professional quality.</p> <p><u>Updated Contents:</u> There are no areas in which contents are updated.</p> <p><u>Information Displayed:</u> The website has a low/medium amount of information mainly displayed as plain text. Yet, important information is highlighted or coloured, rapidly standing out. The information available relates to the brand and its products.</p> <p><u>Ease of Use:</u> It is one of the most user-friendly websites, being very intuitive and easy to access the information wanted.</p>	<p><u>Age verification:</u> The website an age verification system since, to enter the website visitants must insert their birth date.</p> <p><u>E-Shop:</u> It is possible to order the Beer via website, and a purchase policy is available on the website. Moreover, to order one must register and following that, further information is sent to the email.</p> <p><u>Contact display:</u> The company's contacts are only displayed in the contacts' separator. However an icon that links to the Letra's Facebook page is present and noticeable throughout the entire website. There is also a separator that displays current points of sale in Portugal.</p> <p><u>Mobile optimization:</u> The website is not mobile optimized.</p> <p><u>Language Availability:</u> The website is only available in Portuguese.</p>

MALDITA	
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Image	Functionalities
<p><u>Layout &amp; Visual Display:</u> The website has a simplistic design, using 6 main tabs. Yet, most separators have sub-divisions, thus accounting for a total of 19 tabs. The images used are of professional quality. However, it should be noted that the lettering is extremely small, making most contents hard to read.</p> <p><u>Updated Contents:</u> Maldita's website has both a Press and an Events sections, thus enabling for updated contents. However,</p>	<p><u>Age verification:</u> The website does not have an age verification system.</p> <p><u>E-Shop:</u> It is not possible to purchase the product via website.</p> <p><u>Contact display:</u> The company's contacts are displayed at the end of the page in all separators. Yet, given the placement and small size of the contact display, it may not easy to retrieve this information.</p>

<p>contents have not been updated in the separators since 2014 and 2013, respectively.</p> <p><u>Information Displayed:</u> The website has a high amount of information all displayed in a non-schematic format. As mentioned, given the size of the text, it is quite difficult to retrieve information. The information available is related to the brand, its products and production process. Audio-visual materials, as videos, are also available.</p> <p><u>Ease of Use:</u> Due to its size, the website is the least very user-friendly.</p>	<p><u>Mobile optimization:</u> The website is mobile optimized. However, given the extensive size of it, website navigation via mobile is rather confusing.</p> <p><u>Language Availability:</u> The website offers a translation feature that enable translation into 52 languages. Regardless, this translation option is not available in all pages of the website and is located at the bottom of the pages – thus having low visibility.</p>
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<b>PRAXIS</b>	
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<b>Image</b>	<b>Functionalities</b>
<p><u>Layout &amp; Visual Display:</u> The website has a clean and simple design, using 5 main tabs. Most of the images used are of professional quality, yet some lack quality as they are generic pictures (easily obtained in a Goggle search).</p> <p><u>Updated Contents:</u> There are no areas in which contents are updated.</p> <p><u>Information Displayed:</u> The website has a medium amount of information, mainly presented in a schematic format. The information relates to the brand, its products, the Handcrafted Beer history and the production process.</p> <p><u>Ease of Use:</u> The website is quite very user-friendly.</p>	<p><u>Age verification:</u> The website does not have an age verification system.</p> <p><u>E-Shop:</u> It is not possible to purchase the product via website.</p> <p><u>Contact display:</u> The company’s contacts are only displayed at the Contacts separator. Regardless, icons that link to the other digital platforms are available in all pages of the website.</p> <p><u>Mobile optimization:</u> The website is mobile optimized.</p> <p><u>Language Availability:</u> The website is available in Portuguese and English.</p>

<b>SOVINA</b>	
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<b>Image</b>	<b>Functionalities</b>
<p><u>Layout &amp; Visual Display:</u> The website has a clean and simple design, using 8 main tabs. All of the images used are of professional quality.</p>	<p><u>Age verification:</u> The website has a simple age verification system – which enables a faster entry when comparing to the one used by Letra.</p>

<p><u>Updated Contents:</u> There are two areas in which contents are regularly updated – Events and Press. Nevertheless, the Press section has not been updated since late 2014.</p> <p><u>Information Displayed:</u> The website has a medium amount of information, mainly presented in a schematic format. It is also possible to download relevant content as the foodpairing maps. Information is mostly about the brand, its Handcrafted Beers, as well as foodpairing information.</p> <p><u>Ease of Use:</u> The website is one of the most user-friendly.</p>	<p><u>E-Shop:</u> Sovina enables customers to purchase its products via the online shop of the website. Registration is needed to complete purchase, yet payment can be done via Paypal or via ATM.</p> <p><u>Contact display:</u> The company’s contacts are only displayed at the Contacts separator. Regardless, icons that link to the other digital platforms (as Facebook, Instagram,...) are available in all pages of the website.</p> <p><u>Mobile optimization:</u> The website is not mobile optimized.</p> <p><u>Language Availability:</u> The website is both available in Portuguese and English.</p>
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**VADIA**

<b>Image</b>	<b>Functionalities</b>
<p><u>Layout &amp; Visual Display:</u> The website has 4 main separators, being the one with the most amount of visual information, despite its basic design. Afterwards, there are another The images displayed are very few and most of them with low quality. There are also call-to-action buttons so that visitors can find the nearest point of sale, as see detailed information about each Beer available.</p> <p><u>Updated Contents:</u> There are two areas in which contents can be updated – Events and Events Gallery. No information is available in the Events separators, and in the case of the images, it has not been updated since 2012.</p> <p><u>Information Displayed:</u> The website has a medium amount of information, mainly presented in bullet points. Information is mostly about the brand, its products and the production process.</p> <p><u>Ease of Use:</u> The website is quite user-friendly given the low amount of separators.</p>	<p><u>Age verification:</u> The website does not have an age verification system.</p> <p><u>E-Shop:</u> Vadia enables customers to order its products via the online shop of the website. This meaning, it is possible to see the products available and price point, yet the sale itself is done via email.</p> <p><u>Contact display:</u> A link for contact information is available is all pages of the website, as well as links for other digital platforms. Yet, the contact link, in particular, can be rather unnoticeable which difficults the process of retrieving this information. There is also a separator that displays current points of sale in Portugal.</p> <p><u>Mobile optimization:</u> The website is not mobile optimized.</p> <p><u>Language Availability:</u> The website is available in Portuguese.</p>

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