How does Sagres' new communication strategy towards young consumers affects their customer loyalty and purchasing behaviour?

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Abstract (English)

This case addresses a great strategic marketing managerial situation on one of the strongest built brands in Portugal, established in 1940 and since its early days aiming at becoming the leader in the national market. Competing on the beer industry, marketing became essential to break the commodity barrier to attract consumer thus, it is explained in detail how the brand was built and how the loyalty from a currently shrinking market led the company to go under a rebranding strategy to prepare the brand for the future with a search for a new target. Being here analysed the impact that the strategy had on the new target market on perception and loyalty to the brand.

To collect the necessary insights to the analysis, Market Research was held through an online survey and in-depth interviews.

The investigation revealed that the strategy did not reach to the public in general completely, being this a truly necessary factor to success, but when exposed to it, the new target seems to find more self-recognition on the brand's new image, where their lifestyle, their values and straightforward mentality are present.

Abstract (Português)

Este caso debruça-se sobre uma situação de gestão de marketing estratégico numa das mais bem construídas marcas em Portugal. Nascida em 1940 e desde então com o objetivo de se tornar líder de mercado. Ao competir no mercado cervejeiro, o marketing tornou-se uma ferramenta essencial para que este bem não se tornasse um bem indiferenciado entre marcas e assim, encontra-se aqui uma explicação em detalhe de como esta marca foi construída e como conquistou lealdade de um tipo de consumidor que se encontra nos dias de hoje em constante decréscimo. Posto isto, a marca deparou-se com a necessidade de se preparar para o futuro e embarcar numa estratégia de reestruturação da marca, com vista no num público alvo. Neste caso, é analisado impacto que a estratégia teve no novo público alvo em termos de perceção da marca e lealdade do consumidor.

De maneira a recolher dados para poder analisar a questão a que este caso se propõe, foram feitos um questionário online e entrevistas pessoais.

Esta investigação revelou que ainda existe uma grande parte do público que não reconhece a nova imagem, sendo este um fator de extrema importância, mas quando expostos à nova imagem, o novo público alvo reconheceu maior identificação com a marca pois transmite o seu estilo de vida, os seus valores e o pensamento descomplexado desta geração.

Table of Contents

1. Introduction

This case study approaches a great rebranding strategy of a brand in the beer industry so, an extensive search for tools to analyse it was done. Firstly, academic papers were studied to fundament the necessary theoretical concepts and afterwards the case is presented through an exposition of the brand's history and how did the problem emerge. To find answers to it, Market Research was conducted with an online survey and in-depth interviews that after a detailed analysis provided the necessary insights to answer the problem statement below.

1.1 Problem Statement

The problem that this dissertation addresses is "How does Sagres' communication towards young consumers affects their customer loyalty and its impact on sales?". Five research question were developed to find a solution.

1.2 Key Research Questions

1. How do young consumers perceive Sagres?
2. What are differences towards the brand geographically?
3. How has the rebranding changed the consumers' perception about the brand?
4. How loyal are consumers to brands in the beer market?
5. Should Sagres invest on generation Y?

1.3 Managerial relevance

This dissertation aims to be a support to Sagres about the new target that they are after, to understand the effectiveness of the practices that the brand has done so far and to investigate at what extent the brand loyalty is changing.

1.4 Background

Sagres is one of the two dominant brands in the beer industry in Portugal, with 46.2% of market share, whereas Super Bock (the other dominant player) has 47.2%, however they are now facing a great challenge regarding the thrive and the competitive advantage of the brand in the future. The target market is aging and the brand's communication is becoming outdated. Therefore, as Filipe Bonina, Marketing Director of Sagres, says: 'we need to prepare the brand for the future' and the steps taken to do so are changing the tone of communication, leaving the nostalgia and the traditionalism behind, communicating Portugal and patriotism in a more modern way. This change is being done by targeting the generation Y through the moto “Ninguém nos pára” – No one can stop us! – which represents the straightforward and greatly prepared generation that Portugal is now witnessing.

1.5 Aims

Taking into consideration the reality that Sagres is facing, this dissertation aims to understand how consumers perceive this change in the brand. The main objectives are understanding what do consumers value and what is their consuming behaviour regarding beer and face it against how they perceive Sagres’ new image. Adding on this, it is aimed at understanding how loyal are consumers to a beer brand and understand how to increase the existing loyalty. To help answering these questions, the research will be based on the five research questions presented above.

1.6 Methodology

This study will be composed by two different sources of data, primary and secondary. The first part is the result of the collection of secondary data from top journals and articles to sustain the Literature Review and, therefore, the theoretical part of the study. Also, a collection of newspapers articles, websites and market research information given by Sagres together with an interview held with Filipe Bonina[1], the Marketing Director of Sagres, to have insights about the strategy and their goals and motivations, made the pillars to support the Case Study. Lastly, primary data collected for this dissertation through quantitative, a survey, and qualitative, in-depth interviews, gave the necessary bases to build the Market Research. Thus, the dissertation has the following structure and objectives:

→ Literature Review – chapter devoted to sustaining the theoretical part of the research questions through academic coverage

→ Case Study – an exposition of Sagres’ history as a brand and the reasons leading to the change as well as an analysis of the new target and changes on the communication

→ Market Research – with research questions to be answered, there was the need to conduct market research to provide the answers, so qualitative and quantitative research was done to find answers for each question

→ Conclusion – the answers to the research question will be presented and conclusions about the problem statement will be taken

[1] Interview guidelines on appendix 9

→ Teaching notes – this dissertation aims to be used as a learning tool and therefore case study questions will be presented

2. Literature Review

This dissertation aims to study how the change on Sagres' communication and target is affecting the brand loyalty on their new segment of customers and understanding if it changes their consuming patterns. Thus, literature regarding the generation Y, communication, brand loyalty and rebranding strategies has been studied and presented below.

2.1 Preliminary of the beer industry

The beer industry depends highly on marketing to achieve great market shares (Jernigan, 2009), as a study revealed, non-science-based industries, such as alcoholic beverages, brands and marketing are key factors on the growth and success of multinational firms (Da Silva Lopes, 2003). From here, it is perceptible how important marketing is in this industry. In general, the alcoholic beverages industry is dominated by international corporations who own multiple brands across the globe and therefore with great capacity to invest in marketing.

2.2 Generation Y, Marketing and Beer

Generation Y consumers are high information seekers about products, they use internet and modern technologies around the clock, they have a relationship with services, internet and technologies, they are ambitious, confident and independent, competitive and strive for success, love challenges and hate stereotypes and the contact and creation of communities are part of their lifestyle. This generation grew up surrounded by advertisement and expensive labels, making them not trust neither one nor the other, but instead they identify themselves with products representing their lifestyle (Cambal & Vaskovicova Zibrinova, 2011) also, they are very concerned about what other think of them because of their group and community (Markow, 2005) something that directly influences their purchase options. As already seen, this generation is demanding and advertisement must be close to perfection to be effective. Thus, advertising to this generation Y needs to be practical and have clear information, with humorous undertone, with no underestimation of the details (well prepared), focusing generation Y's lifestyle and with common creation of trademark. Moreover, it is critical to have good design and never forget the mobile marketing version due to the influence that technologies have on their lifestyle (Cambal & Vaskovicova Zibrinova, 2011). This group processes more information than previous ones, through multimedia and sensual acts they became used to graphic and sound effects which made them prefer movement, dynamics and music. This is the so called key triangle of "picture-sound-music" that influences the young generation ("Psychológia s sociológia trhu," 2009). Furthermore, as (Lazarevic, 2012) found, the congruency between the values, image and identity of the brand and the consumer is key to secure the purchase and repurchase from generation Y consumers and also to create a relationship between one another, authenticity and self-identification rather than traditional advertisement are the drivers to engage and attract Generation Yers. When looking at valued aspects of a brand by Gen Y, innovation is guaranteed to be one of them, something that was studied and proven by (Gözükara, 2016) who showed that brands which are considered to be innovative by this generation are more likely to secure brand loyalty, since it positively affects brand trust and therefore, brand loyalty.

2.3 Communicating beer

According to Kotler (Kotler & Armstrong, 2013), communication is a process which has 9 different elements (Figure 2-1), being the Sender and the Receiver the two major parties and the Message and the Media – the communication channels used from Sender to Receiver-, the two major elements. Then the Sender must decide their audiences and the response that they pretend from them. Thus, the message needs to be correctly encoded to the target audience decode it and channels to receive feedback from their audience must be created, this process is the two-way communication. According to (Lindon, Denis Lendrevie, Jacques Vicente Rodrigues, Joaquim Dionísio, 2000) there are three reasons behind the importance of an organized and voluntary communication, primarily because the behaviour of a consumer towards a product and mainly the decision to buy it or not depends on the image they have about it. Secondly, the image that consumer has about, not only, the products but also the company is the insurance in times of crisis and lastly, to have control over the communication that the company has. Independently of having a structured communication strategy or not, a company always communicates on every single touch point that the company has with a customer. By having a systematic communication strategy, the company may control its own image and it does not allow competition to do it for them. Nowadays, communication managers must understand that there is a variety of markets, marketplaces, customers, channels and media options (Kitchen, P.J., Schultz, 1999), the certainty of communication channels is disappearing and brands are have to put the effort to try alternatives as the internet, mobile marketing or product placement to create a bond with their

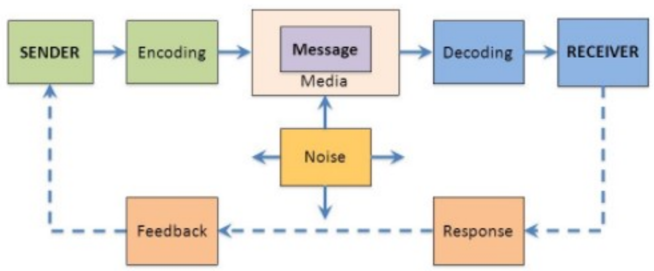

Figure 2-1 – elements of the communication process customers (Banerjee, 2016). Moreover, the way consumers use the different media channels nowadays is changing dramatically leading to a reality where they choose the when, where and how they choose their brands (Batra & Keller, 2016). So lately, with the use of Integrated Marketing Communication (IMC), a concept that works out the roles that various promotional tools will play and the extent to which will be used, it carefully coordinates the promotions activities and their timing when major campaigns take place. The multiple communication channels tend to be used altogether to better reach the target audience and extract the desired feedback by creating synergies when combined (Kotler & Armstrong, 2013; Taylor, 2015). This synergies happen due to the vast number of possibilities that a marketer has to reach their customers so by doing it in a thoughtful sequential way, it is possible to shorten the decision journey or funnel. However, this sequence needs a context and it gets challenging because one message need to "build on" another this is, each communication attempt must not only have its main purpose of communication, but also be in the context of the previous and the next one (the sequential purpose) (Batra & Keller, 2016). The use of this strategy can potentially lead to higher effectiveness on communication and reach higher levels of brand equity (Madhavaram, Badrinarayanan, & McDonald, 2005), this is, achieving higher brand awareness and better brand image.

Nowadays one cannot avoid knowing how does it happen on the digital world and, in fact, it is a game changer because the audiences now access information in a different way. According to (Gurău, 2008), the changes are that the following:

- The audience is now connected to the organizations – anyone can contact a company with a click

- The audience is connected to one another – people can, and they do, talk about companies and experiences without their knowledge throughout the web

- The audience has access to other information – nowadays it is easy to access multiple sources of information about the same subject/product and people can analyse, compare and discuss about it

- Audiences pull information – with all the flood of information surrounding us every day, people became experts on how to filter what is of their interest and they rather pull the information they want to see

Thus, one must know that these changes are real and think strategically to take advantage of them. The integrated online marketing communication offers synergies that we cannot find on the traditional channels and the following are highlighted - (Gurău, 2008):

- The organisations can combine one-to-one (email), one-to-many (list-based email messages, web pages), and many-to-many (discussion forums) communication in the online environment

- Technology now allows companies to transmit or receive content in forms of text, sound, video or image

- The organisation is now able to implement advanced software applications that connect its marketing and management information systems with the online environment, and to automatically coordinate the communication with various audiences (Basu, Poindexter, Drosen, & Addo, 2000)

- The capacity to automatically capture and register customer data (demographic or behavioural) and customer feed-back;

- The capacity to automatically analyse the information collected about audiences, to a level of segmentation and detail that allows the implementation of one-to-one marketing communication

- Capacity to use existing databases to coordinate highly targeted campaigns

All these changes are a reality on how consumers interact, share opinions and choose their brands so it is key to master them and to know how to communicate and take advantage of the new media channel possibilities to reach the synergies highlighted by (Kotler & Armstrong, 2013) and (Taylor, 2015).

The next step is seeing how it happens in the real world by analysing the communication on the beer industry. So by 2008, more than half of the investment on advertising from alcohol companies was spent on television and 40% more on newspapers and magazines and then, of course, social media (Mart, 2011). In general, beer brands build their marketing upon three values, socialization, friendship and community building (Teixeira, 2015). Firstly, the focus will be on the television commercials and authenticity that is linked to it and secondly the focus will turn to social media. Marketing has changed a lot in the last century, nowadays – and specially the younger generations – do not feel trust on the ‘capitalist’ commercials for mass consumption shown in around the 1960s as (O’Neill, Houtman, & Aupers, 2014) put it. Nowadays, authenticity is what consumers want and in beer commercials there some ways to do it. In a study made by (O’Neill et al., 2014), 153 beer commercials from English and Dutch speaking western countries were analysed and 55% of them were linked to authenticity. The path to reach it was through 'Crafting authenticity', 'Firmly rooted in history', 'Authenticity, naturally' and 'Location, location, location' and reasons why are clear. The crafting shows the know-how to reach quality, history represents heritage, the naturally seeks the ones who appreciate natural ingredients and location is linked to pride about a country or patriotism. Moving on to social media, where audiences can interact and engage on the content publish by brands, according to (Teixeira, 2015), images accompanied by text are the most usual type of post by beer brands, whereas video together with text represents 13.5% of the studied posts. The posts from all the studied brands had as content information, emotion, call-to-action, promotions and branding. From these, posts with informative, emotional and branding content were the most common ones with 50%, 45.7% and 78.6%, respectively. It was discovered that posts promoting the brand's personality were the ones creating higher levels of engagement by the audience. Also, posts with promotions and product promotion were found to be highly attractive. Moreover, it has been found that *local* (national) and *global* beer brands have different impacts on engagement by their audiences with *local* brands achieving higher levels. In fact, posts with personality content were only found significant on *local* brands, which can be related to personality being strongly linked with culture and therefore, a national brand being seen as a knowledgeable source of national culture.

2.4 Creating loyalty in the beer industry

Firstly, as suggested by the company 'Interbrand', brand is a sum of all seeing and hidden characteristics, which are making the proposal unique. Thus, to reach the status of brand a mark needs to be capable of creating something valuable and important for its customers, to express this in attributes and in its communication and ultimately, to gain the desired recognition and long-term consumer preference, also called brand loyalty (Vaptsarov & Academy, 1896).

Path
Consumer-brand identification → perceived value
Consumer-brand identification → trust
Consumer-brand identification → consumer satisfaction
Consumer-brand identification → brand loyalty
Perceived value → consumer satisfaction
Perceived value → trust
Perceived value → brand loyalty
Consumer satisfaction → trust
Trust → brand loyalty

Figure 2-2 – Influencers of brand loyalty

According to (Augusto & Torres, 2017), who studied the path to brand loyalty on the beer market, there are several ways to reach brand loyalty. Consumer-brand identification, perceived value and trust are key elements to reach loyalty from beer consumers. It was also found that among these elements there are multiple links and influences among themselves, as we can see on Figure 2-2 (source: Augusto & Torres, 2017). As the authors of this study say, *"This reinforces the importance of building brands that carry meaning for consumers, in order to promote consumers' perceived state of oneness with a brand, thereby enabling positive emotional links between the consumer and the brand"*. This applies, not only, to brand identification but also to every element on Figure 2-2 because they all will, somehow, influence brand loyalty. One brand should have in consideration the brand identification, perceived value, trust and consumer satisfaction to ensure loyalty from their consumers. These findings are supported by (Zehir & Kitapçı, 2011) who studied the effect of brand experience, satisfaction and trust on brand loyalty. It was found that all are significant when influencing brand loyalty. Moreover, it was discovered that brand experiences create trust-based relationship platforms between brand and customer also, trust makes customers be willing to remain loyal, pay premium price, minimize the risk of purchase, decrease the brand expenses, to buy new products in the existing or in a new category under the name of the brand and generate positive word of mouth by sharing his/her preferences and tastes (Vaptsarov & Academy, 1896; Zehir & Kitapçı, 2011). Country of origin image is also a driver of brand identification that, as already shown, generates brand loyalty and perceived value, this was found by (Listiana, 2015) who studied the impact of country of origin image on perceived quality, brand association and brand loyalty. All these findings above were also found true "on the field" in a study conducted in Indonesia where (Amelia, 2017) studied the effects of Brand Awareness, Perceived Quality and Brand Loyalty towards the Brand Equity of Beer Bintang in Surabaya. The results of this study showed once again that Perceived Quality and Brand Awareness positively influence the levels of Brand Loyalty and this one increases the value of Brand Equity.

Moving on to the role of social media and the impact of online communities on brand loyalty, it has been studied (Sánchez-Casado, Confente, Tomaseti-Solano, & Brunetti, 2018) how five different relational benefits (monetary, recognition, social, entertainment and exploration) of a brand's online brand community influenced either Customer Based Brand Equity (CBBE) and Customer Loyalty, which was divided into word of mouth and repurchase intention. The results showed that both social and exploration benefits had positive impact on both variables, which indicates that the members of online communities search for social attachment with the community and its members. Moreover, the respondents showed willingness to seek for information about the brand as products, updated news or events. Also, brand value and repeat purchasing behaviour were found to be impacted when online communities had real time and tailored for features, news updates and content relevant to the participants (Dholakia, Bagozzi, & Pearo, 2004). Repurchasing intention and positive word of mouth had monetary benefits as their biggest influencer, which is not surprising since discounts and monetary savings are entirely linked to the purchasing action. CBBE on the other hand, was found to be influenced also by recognition benefits derived from a feeling of belongingness (Sánchez-Casado et al., 2018; Yoshida, Gordon, Nakazawa, Shibuya, & Fujiwara, 2018) that one has when it is in a community. Consequently, the brand attachment increases as well as the related equity and despite not meaning purchase or repurchase intention, the importance of being part of a community turns the member into an advocate of the brand. Finally, entertainment benefits did not represent any influence on both variables (Sánchez-Casado et al., 2018; Yoshida et al., 2018) which may be explained by the lack of investment by companies on gaming or entertainment content leaning more to information related to the four other investigated elements. Now, trying to move from the online to the real world, (Yoshida et al., 2018) studied how to bridge the gap between social media and the behavioural brand loyalty and following the previous literature presented by (Sánchez-Casado et al., 2018), in this study evidence was found that to reach the behavioural brand loyalty, fostering the interaction with other users on online communities is not enough. Thus, the engagement on brand-related use of social media is key to secure brand loyalty.

2.5 Rebranding a beer

Strategic Marketing is characterized as a systematic and permanent review of the marketing needs to develop new products for specific markets, distinctive from the competition, ensuring competitive advantage. One of the areas under Strategic Marketing is branding and its purpose lies, also, on creating a long-term sustainable competitive advantage (Todor, 2014) and is often symbolized by a trademark that carries a set of tangible and intangible attributes, creating value and influence. On a branding strategy is mandatory to have into account the market requirements and not having a rigid trajectory in history and brand standards, otherwise the company may face a situation where the brand becomes exceeded and beat in relation to other brands. When one is facing this situation, a rebranding strategy may be the necessary solution. This happens when the brand image is confusing or inexistent, the main benefit of the brand is no longer differentiator, the company changes the planned direction of the brand, the renewal of organizational culture requires at least a review of the brand personality, among others, or, as identified by David Aaker, the target market ages.

To reach a successful rebranding, (Ryan, Moroney, Geoghegan, & Cunningham, 2007) who studied the repositioning strategy of Bulmers cider, identify six fundamental elements in the case:

i. Core, deliberate strategic values

Repositioning requires realignment and refocusing of the company's strategic posture.

ii. Strategic flexibility and strong learning capabilities

As John Keogh (Marketing Director, Bulmers Ltd, 1994–2001) said, regarding their strategy: '*It is and should be constantly evolving and your strategy should be constantly evolving'.* In the case, Bulmers had the strategic flexibility to launch new products in response to input given from consumer trends and employee input.

iii. Top management commitment

The strategy was led from the top and furthermore the focus in repositioning the brand was on the overall good for the company going forward. Also, there were no specific managerial incentives for the success of the repositioning strategy being pride and willingness to success the main drivers for the managers.

iv. High customer awareness and sensitivity

The great awareness that Bulmers had of their customers allowed them to segment and categorize their customers and target those who were most likely to be swayed into buying the product. Moreover, allowed them to change their communication and the brands' positioning to premium and thus, increasing the price.

v. Critical external orientation

It was a strategy left behind by Guinness (the market leader) that triggered Bulmers' repositioning to their original roots of naturalness, heritage and tradition together with the opportunity perceived from consumer brand switching, this showed a deep understanding of external developments which wasn't shared by others.

Figure 2-3- Model of corporate rebranding

vi. Belief in the product and the brand

The management's conviction about the quality of the product was unquestionable and that was seen in strength of the brand and product.

(Miller, Merrilees, & Yakimova, 2014), have also studied corporate rebranding aiming to find the major enablers and barriers to the success and they highlight three phases on this process (Figure 2-3, source: Adapted from (Merrilees & Miller, 2008; Miller & Merrilees, 2011)). In line with previous literature presented, the enablers are also six and very similar to the presented above. It all starts with *Strong leadership commitment*, which was too presented above, that according to the authors influences the three phases in the sense that strong leaders are committed to the strategy and influence key stakeholders to participate in the brand re-vision (phase one), to develop support to the revised brand (phase two) and finally, to implement the strategy (phase three). The second enabler is *Developing brand understanding* (phase one) which is usually done by undertaking qualitative and quantitative research to understand the market environment for the brand. Thirdly, *Internal brand activities* (phase two) occur inside the organization communicating and training to the new reality. The following enabler is *Continuity of brand attributes* (phase two) that research shows this continuity encourages the stakeholders to endorse the revised brand (Alford, 1998). Fifthly, *Stakeholder coordination* (phase three) to implement the brand strategy and lastly, the *Integrated marketing programme* (phase three) which happens by communicating the meaning of the revised brand.

Finally, the barriers to corporate rebranding, factors that unable the change, are five and all of them happen throughout the three phases except for *Inadequate customer consideration* that happens only one phase two. The remaining barriers are *Autocratic rebranding approach*, *Stakeholder tension*, *Narrow brand revision* and *Inadequate research*.

3. Case Study

Sagres is nowadays suffering a rebranding strategy to prepare the future of the brand. Their target so far is shrinking and change to thrive in the future is necessary. Thus, the brand turned its attention to generation Y and a huge turn in their communication is taking place. Below it is presented an analysis of the beer industry in Portugal, generation Y and Sagres' rebranding strategy, well enriched by a meeting with Filipe Bonina, Marketing Director of Sagres and the responsible person for this great change.

3.1 An overview of the beer industry

By 2016, beer production reached 1.96 billion hectolitres, being the most consumed alcoholic drink and the third most consumed drink after water, resulting in annual revenues of $294.5 billion. This industry includes the brewing, transportation, distribution, advertisement and consumer consumption of beer. This industry has been a fairly fragmented market, however this trend is apparently changing as Anheuser-Busch, brewery based in the U.S, alone has 20,6% of the market share globally[2].

3.2 The beer industry in Portugal

Being the 12th largest producer of beer in the EU, with production reaching 6990 thousand hectolitres litres in 2017, with 9 production sights[3], Portugal has been investing lately in premium and craft beers to enrich the Portuguese culture about beer and to enhance the relation between beer and gastronomy – as Filipe Bonina said. The innovation around this industry is making the Portuguese population buy more beer and more, leaving behind a 10 years period of sales decrease,

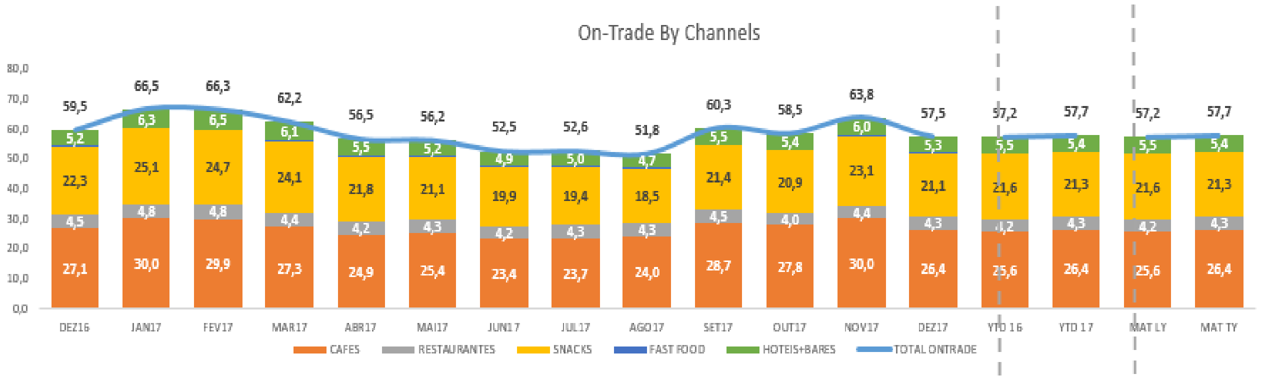

Figure 3-1 – On-trade sales by channels in 2017

heavily influenced by the economic crisis, until 2014 (when it reached its lowest peak) and start increasing again by 3% from 2015 to 2016 reaching €1028 million and 74% penetration in national homes[4]. In fact, in 2017 Portugal saw an increase of 8% on the national consumption of beer and the exports grew 12.6%, with great help of China, helping to balance Portugal's commercial balance[5]. To keep this sector growing, there is a pact on the table with government to freeze a tax that will allow reinvestment to increase national production and therefore job positions. Thus, it will possible to keep on reverting the situation that by 2006, the beer industry in Portugal alone employed over 122 thousand people, direct and indirectly. Around 91% worked in the Horeca channel, 6% on suppliers to breweries and the remaining were direct employees of the Portuguese breweries[6]. The decrease in consumption mentioned above had clear impact on this area since, despite the growth, there are now 80 thousand employed people on the beer industry.

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[2] https://www.worldatlas.com/articles/all-about-the-beer-industry.html
[3] https://www.cervejeirosdeportugal.pt/dados_economicos/
[4] http://www.hipersuper.pt/2017/08/04/dia-internacional-da-cerveja-os-numeros-da-industria-cervejeira-portugal-na-europa/
[5] https://www.cervejeirosdeportugal.pt/consumo-de-cerveja-aumenta/
[6] http://www.tvi24.iol.pt/europa/cerveja/industria-cervejeira-emprega-mais-de-122-mil-em-portugal

The favourable weather felt in the country enhances being outdoors and therefore, the consumption of beer in Portugal happens mainly on-trade, representing 57.7%, while the remaining happens off-trade. Cafés and Snack Bars are responsible for the majority of the on-trade sales since they account 26.4% and 21.3% (out of the 57.7%), respectively (represented in figure 3-1). As it could be expected, Lisbon represents the area with the largest consumption in Portugal (19%), followed by the Centre north (14.8%) and to close the podium, the Southern part of Portugal excluding the Algarve and Porto (13.5% and 13%), Appendix 1.

This market in Portugal is highly concentrated, it may be described as duopoly, since 93.4% of the market belongs to Sagres and Super Bock with 46.2% and 47.2% market share, respectively (Appendix 1). These two brands are both present in the major events and communication sights throughout the year and both have the same main common values behind it. Friendship, passionate moments, partying and being together friends are the pillars of the communication of these two brands and the two invest greatly on two major contexts: football and music[7]. Super Bock has a music festival named after it, Super Bock Super Rock, generating huge share of voice and regarding sports, the brand sponsors Sporting Clube Portugal and Futebol Clube do Porto with their name on the shirts, whereas Sagres sponsors Benfica (among the top 3 teams in Portugal) and the national team of Portugal, already with an historical relationship. Nowadays, the connection between music and Sagres is surely not as developed as Super Bock's since that Sociedade Central de Cervejas e Bebidas, SA (SCC) – the owner of Sagres and representative of Heineken in Portugal, have been investing on the music sector more strongly with Heineken.

3.3 Sagres' early days

In 1934, the SCC is established fruit of a merger between four Portuguese breweries and six years later Sagres was born[8]. Shortly after, in 1943, they started exporting to the Portuguese colonies. 20 years later Sagres made their first advertisement campaign and the Portuguese writer José Carlos Ary dos Santos created the famous slogan "Sagres, the desired thirst". The growth did not stop until 2002 when Sagres became the most sold Portuguese beer worldwide, being Angola, Cape Verde, Spain, France and Switzerland their biggest exporting nations and in 2008 they achieved for the first time the leadership on the national market and from then on, a constant rivalry with Super Bock.

[7] https://marketeer.pt/wp-content/uploads/2016/06/cervej.pdf
[8] http://www.centralcervejas.pt/pt/sobre-nos/historia.aspx

3.4 Sagres before the change

Sagres and Super Bock have been competing for market leadership in the Portuguese market for quite some time already and there has been a “fair-play” between them about targets. Super Bock has a more disruptive and innovative communication pleasing younger generations while Sagres is the authentic Portuguese beer, carrying Portugal on its logo and thus, having a more traditional and patriotic communication. Consequently, Portugal became significantly divided in terms of preference on beer having these two brands disputing for the leadership every year. Thus, with Portugal “divided” and with both brands having nearly 50% of the market each, their concern was mainly keeping a strong brand and trying to be market leaders. In 2007 Sagres invested on integrated marketing communication for the first time with Fischer Portugal, an advertising agency, as their partners aiming at *“the consumer having the same type of message from the brand independently of the touch point”*, said Nuno Torres[9] (Sagres’ Marketing Director at that time). To secure its strong brand Sagres kept investing strongly in marketing and always keeping its image strongly linked to Portugal, being this its strongest characteristic and reference in the communication. This connection to Portugal had the objective to name Sagres the beer every to social moment of any Portuguese, both in the country as abroad since there was bigger margin to grow in foreign markets than national ones[10]. The path to become the desired social beer to every Portuguese happened by having constantly national figures in the communication, creating songs with Portuguese artists, sponsoring the national football league as well as many teams from the first division and the national team, making presence in popular celebrations, sponsoring music festivals and creating songs with national artists. After Sagres embraced integrated marketing communication, there have been several campaigns reinforcing the values of the brand and in 2009 there were proven results since Sagres placed first as the most associated brand to football and second with music, whereas the rival Super Bock scored

Figure 3-2- Dominant brands on music and football in Portugal in 2009. Source: BrandScore

[9] http://www.meiosepublicidade.pt/2007/05/Sagres_explica_conceito_de_comun/
[10] https://marketeer.pt/2011/03/25/sagres-quer-reforcar-quota/

exactly the opposite, first on music and second on football[11] (Figure 3-2). These two areas are able to carry great emotion with them and beer brands see that as a great opportunity to bring values and to become closer to customers on their experiences. This is why these two rivals again were the two most associated brands to summer music festivals in Portugal (except the ones endorsed by a single brand)[12]. With such a strong presence on the sports area and the national image, Sagres always knew the importance that music had. It was not only on 2009 that Sagres and music were hand to hand, in 2005 Sagres not only secured it sponsorhip to Rock in Rio 2006[13], that kept for the next two editions in 2008 and 2010[14], but also made sure to be present in great part of music and traditional events that year. Up until 2012 Sagres had a really strong presence in music through Rock in Rio and many other festivals in Portugal however, in this year the SCC, that also represents Heineken in Portugal, took Sagres out of Rock in Rio and gave place to Heineken[15] to grow the brand's share in the country. Heineken became then the sponsor of the two major music events in Portugal that year with presence in Rock in Rio, edtions 2012 and 2014, and Optimus/NOS Alive,every year since 2012 until 2017, in this last one there was even a stage named after the

Figure 3-4 - Sagres' new packaging. Source: Meios e Publicidade

Figure 3-3 - Sagres' campaign supporting the national team. Source: Imagens de Marca

brand. Thus, despite Sagres' presence in plenty of traditional events and smaller music festivals from North to South of Portugal, the connection to music became more fragile. This absence of Sagres from the major festivals in Portugal had consequences on the link between the brand and music when in 2017 the brand was out of the 13 brands linked to music in Portugal[16], where Super Bock and Heineken were strongly present. Despite this, portugality and football never left the brand

[11] http://www.meiosepublicidade.pt/2010/02/super-bock-e-sagres-mais-associadas-a-musica-e-ao-futebol/
[12] http://www.meiosepublicidade.pt/2010/04/super-bock-e-sagres-dominam-festivais-de-verao/
[13] http://www.tvi24.iol.pt/portugal/u2/sagres-reforca-aposta-na-area-dos-patrocinios
[14] http://vendicerve.blogspot.com/2010/05/sagres-com-copos-100-degradaveis-no.html
[15] https://www.dinheirovivo.pt/buzz/heineken-havera-ainda-mais-cerveja-em-nos-no-optimus-alive/
[16] https://marketeer.pt/2017/06/30/marcas-na-musica/

and became the two biggest assets on the communication. Sagres knowing their strong position on the football area and national value, using all the tools mentioned above launched, investing 3 million euros, the "Sagres somos nós" – We are Sagres campaign, which became the signature of the brand by 2011[17][18]. As Nuno Simões, Sagres' commercial Director at the time, said, the signature "Sagres somos nós" allowed a unique tone on the brand because up to this time, every product communicated its core benefit individually and now all the offering is together and communicated under the same signature, which will be present in every point of the brand's communication. We are Sagres took advantage of the entire cocktail of the mentioned communication tools by including Luís Figo as the campaign's main character as well as national comediants, actors and well known portuguese musicians playing the song. This campaign had an intense sence of union and pride the portuguese customs and traditions. As a result, Sagres finised the year leading national sales and ready to reinvest on steping up its position since 500.000 euros were spent to reinforce the portuguese values on the brand by redisigning the entire offering to a more modern and close to consumer bottle[19], Figure 3-4. Sales were doing fine nationally so there was stability to look abroad, the new desing highlighted the national colours and the portugues symbol to pursue the one living abroad. In 2013, Sagres strikes again with a 7 million euros campaign reinforcing portugality on the brand[20]. This time, the moto was wherever there is a portuguese person, in any continent, there is a Sagres. So one may not have what Portugal has to offer (the sun, the beaches, the sea, the food, etc) but at least, there is Sagres. Once again, the camaping featured well-known actors, union and strong feelings about the country, in line with the previous campaigns. Regarding the footballistic side of the communication, the brand's history is full of great achievements. As mentioned above, Sagres sponsors the national football team, several teams playing in the first division and it even sponsored the league. Historically, Sagres and the national team have been always together, celebrating 25 years of sponsorhip in 2018, and launching a campaign during any big international tournament. Moreover, it creates fan zones transmitting the matches and allowing the nation to watch it together. Unsurprisingly, Sagres has been named one of the 6 brands linked to football in 2018[21].

Sagres' target at the time was 70% men and 30% women who enjoyed drinking beer in social and leisure time with ages between 18 and 65. The weight on men had signficant impact on the communication content and presentation, not only due to the strong connection with sports but also

[17] http://www.meiosepublicidade.pt/2011/03/tres-milhoes-para-dizer-sagres-somos-nos-com-video/
[18] https://marketeer.pt/2011/03/25/sagres-quer-reforcar-quota/
[19] https://www.dinheirovivo.pt/buzz/sagres-esta-nova-imagem-reforca-a-nossa-ligacao-aos-valores-nacionais/
[20] https://marketeer.pt/2013/05/17/sagres-quer-reforcar-quota-com-portugalidade/
[21] https://marketeer.pt/2018/06/22/marcas-no-futebol-2/

by always feauturing beautiful women appealing to men, and it's a fact that the brand thrived along its years. However, it is also a fact that this strategy created loyalty in a type of consumer that it loosing dimension as the years go by.

3.5 Sagres challenging the overall Generation Y

There is not a general consensus regarding the beginning and ending of this generation, but it starts around 1980 and finishes before the year 2000 and represents roughly 25% of the world's population, being the most representative among generations X (21%), Y and Z (18%)[22]. As one can see by the birth dates, generation Y, also called millennials, is now reaching and being the fast-growing segment of the workforce, which shows its economic potential importance. Sagres knows that this generation is more family oriented than previous ones, which may be explained by a great number of overworked parents. Thus, generation Y prefers flexible working schedules allowing to have a positive work/life balance[23]. Despite the need of a good balance between work and life, this is a very ambitious and confident generation being, since the beginning, willing to take important roles in a company. Also, this generation is more likely to stay to go further on education than ever before[24], something that Sagres is not missing as demonstrated below. Besides this, the concept of entrepreneurship is extremely valued, and it breaks barriers when defining how high can one go in a professional context. Moreover, companies embracing technology and with no traditional culture, are the ones attracting this entire workforce not forgetting that being a team player is not only normal but preferred by generation Y and they expect it in an organisation, together with transparency and openness. On a personal level, this generation is described as open-minded, more liberal, respecting different ways of living and new ideas however, they tend to be more narcissist than previous generations, very worried about the 'me' and not as much about groups or helping the community, unlike generation X [25].

When marketing this generation, companies cannot do it in a traditional way[26] since they tend to ignore advertisement on magazines or television due to growing up immersed in technology as computers, smartphones, tablets, etc., so that is where they want and expect to be approached. However, it is not only the communication channels that matter, the content presented to them plays a key role when grabbing one's attention and to do so it must have present characteristics as honesty, shortness, direct, personalized, ethical, humorous and surprising and also being related to

[22] http://www.generationy.com/about-generation-y-in-the-workforce/demographics/
[23] http://www.generationy.com/about-generation-y-in-the-workforce/characteristics/
[24] https://www.bbc.com/news/uk-scotland-41036361
[25] https://www.livescience.com/38061-millennials-generation-y.html
[26] http://socialmarketing.org/archives/generations-xy-z-and-the-others/

their lifestyle[27], thus Sagres is now basing their communication taking this aspects into consideration, as one may see below. Demographic segmentation is not effective anymore, the communication must be psychographic segmented for them to relate with it. Another important aspect is what is a company selling and when advertising what engages millennials is selling experiences, not products meaning that a product/company needs to add value to their lives, solving a need and all this aligned with their values and lifestyle not forgetting to use language and visual elements that are familiar to them. Word of mouth and online reviews became two of the most important decision factors to millennials, others' opinions are extremely valued and play a huge role on the decision-making process, so a brand can never forget to manage this and to put effort on having a positive opinion on their customers and to encourage referrals, feedback and reviews. Thus, a brand needs to be a master on social media by creating contact allowing customers to engage with them, it is also a great mass media channel and this where the opinions and reviews will be made and read by other customers.

To sum up, this generation feel the need of having a personal bond with brands, to feel that they are heard and that their opinions matter to the brand. Regarding the, already describe above, relationship between brand and a generation Yer, supporting causes that are important to them, offering a product range that should be wide and customisable, allowing customers to engage with one another and always wanting to create a long-lasting relationship are critical factors success among this generation[28].

3.6 Sagres and their rebranding strategy

Despite the successful history that Sagres has, the brand is currently facing a major challenge with their future in "danger". Therefore, to change the path that they were taking, Sagres has decided to change their target to younger population, mainly the generation Y, so that the brand may be prepared for the future. Since a radical change was needed, it all started by hiring Filipe Bonina to become Sagres' Marketing Director who quickly understood that products as beer (low involvement products) face a huge challenge nowadays when managing/creating loyalty from their customers. Therefore, the commodity barrier needs to be broken everyday so that a brand manages to secure their customers on a daily basis. The path to break this barrier had an investment of 7.5 million euros to leave behind the "Sagres somos nós" and giving birth to "Ninguém nos pára"[29]. The steps taken to make this happen were changing the tone and the content of their communication, leaving

[27] https://www.searchenginepeople.com/blog/16081-gen-y-marketing.html
[28] https://www.marketingmag.com.au/hubs-c/engaging-gen-y-in-your-marketing-whats-the-secret/
[29] https://www.dinheirovivo.pt/marketing-pub/ninguem-nos-para-sagres-investe-75-milhoes-para-falar-com-geracao-no-bullshit/

the nostalgia and the conservative side of the brand behind, as well as the masculinity of the communication, the communication channels and start communicating Portugal in a very different way. This last step is key to engage with the new target, since it is happening exactly through the younger generations highlighting how well prepared for the future and capable they are (being the

Figure 3-5- Ninguém nos pára outdoor

most educated generation ever), a generation who suffered the economic crisis directly and still overcame it, a generation that is more straightforward and less complexed than ever before and very different within everyone in it, mastering every area from arts and sports to neuroscience and economics. This was exactly where they started, instead of using Portuguese celebrities and appealing to union as they did before the change, they featured the 'new celebrities'. Successful millennials with four different backgrounds, arts, social impact, education and innovation and entrepreneurship, to give them voice and recognition from their success and keeping the tradition, a music from the national brand We Trust was used[30]. Knowing the importance of the communication channels, this first campaign was launched in social media with five short films telling the story of all of them and one common video explaining the new moto of the brand. Fábio Galindro, one the featured millennial said that he identified himself with the campaign because it transmits an idea of not being stopped, seeing something wrong and work to improve it.

3.7 Sagres pursuing the challenge

To make sure that millennials feel attracted to the younger Sagres, their communication is being entirely related to the tastes and likes of their new target, the link to summer is increasing, the masculinity of the communication was left behind so that women became approvals of the brand as well, the relationship with football is switching to a more contemporary way and all of this is present in the communication channels where the target is present. Social media is obviously one of

[30] http://www.meiosepublicidade.pt/2017/05/cerveja-sagres-prepara-investir-75-milhoes-na-geracao-millennial/

the most important, if not the most important, of the channels, the connection to music and music events is also being enhanced. Thus, as previously highlighted, Sagres connected to NOS Alive, the biggest music festival in Portugal, as the official beer in the festival and created the "Sagres ao melhor público" – "Sagres to the best public" campaign through outdoors, social media presence and campaigns giving away tickets to the festival and numerous social media influencers spreading Sagres' new image there, Appendix 5. This increase one the link to music, with a stage at NOS Alive named after Sagres (as it used to happen with Heineken), is a way to become closer to the young audience that attends this festivals ,as well as all the foreigners that attend it, to respect the new positioning of the brand and to correspond to consumers' expectations as illustrated by João Cardoso, sponsorhip manager of Sagres[31].

About the link to football, the differences are happening by investing on passionate moments and comedy to promote it, the content and tone of voice changed completely and the investment on content about football on social media pages has also increased. As an example, Ricardo Araújo Pereira, famous Portuguese comedian, led Sagres' campaign during FIFA World Cup Russia 2018 remembering Portugal's European title in 2016 by commanding everyone to repeat every single move they made back in 2016.

As already mentioned above, the Portuguese culture about beer is increasing and Sagres plays an important role in it by turning the beer industry into an innovative one, a truly valued aspect by millennials - innovation. Thus, together with all the changes in the communication, Sagres is playing a disruptive role with the launch of new types beers and teaching consumers how and when should they drink them. However, the connection to millennials is not the only reason for innovation, this brings great visibility to the brand and with the appearance of the embryonic culture of beer in Portugal beer becomes closer to wine with a wider offer and richer options to different occasions. Thus, Sagres has now five different beers (Appendix 6) in their portfolio and they are Sagres, Sagres Preta (stout beer), Sagres Cascade (lager beer made of cascade, a hop), Sagres Radler (beer mix with juice) and the Bohemia line, a half-way to craft beer, composed by four different options with rich ingredients and created to go along with meals. As their augmented product, Sagres displays a set of merchandise (Appendix 7) to their customers, such as sun umbrellas, and they also provide the installation and distribution of their beer to their customers on the Horeca channel. In Portugal, Sagres has an intensive distribution strategy being present in every retailer at a national level, whereas in the Horeca channel they usually dispute the draft beer brand

[31]http://www.aporfest.pt/single-post/2018/01/25/Sagres-uniformiza-e-refor%C3%A7a-a-sua-ativa%C3%A7%C3%A3o-nos-festivais-Entrevista-Jo%C3%A3o-Cardoso-Sponsorship-Manager

sold in the commercial establishment with Super Bock and lately with Estrella Damm as well, a Spanish beer that entered in the Portuguese market in 2012 under a partnership between the Damm group and Sumol + Compal. Regarding bottled beer, the presence of each brand depends on the commercial establishment will of having one or numerous beer available.

By now, it is known that Sagres is changing every detail of their communication, that 7.5 million euros were spent to do it and that the focus is entirely over the millennials however, it is still unknown how effective have been the changes the so far. Consequently, research was done to understand it.

4. Market Research

Trying to answer the research question that this dissertation addresses, an online survey (Appendix 8) to gather the maximum amount of quantitative data and nine in-depth interviews (Appendix 9) for deeper and qualitative data have been held.

Starting with the survey, it was divided in 6 blocks, summarized below, with different objectives. The first one helped describing the respondents' drinking habits of beer and their knowledge about brands in the market. Then the second one dealt with characteristics valued on a beer, the third one built one the drinking habits to find the preferences of where and when do the respondents enjoy having a beer. The fourth and fifth ones introduced Sagres on the survey and aimed at knowing the respondents' perception about the brand's communication and values in the past versus today with the "Ninguém nos pára" campaign and the rebranding strategy and lastly, the demographic block presented next. There were 260 respondents, from which 166 were complete, where 55% were male and 45% female. The age distribution had nearly 70% in between 18 and 28 years old, which represents a big part of the generation Y, followed by the intervals 39-49 and 50-59 with 12.7% and 10.2%. Regarding area of residence, 161 respondents lived in Portugal and 152 lived in Lisbon.

Block 1: In this block it is visible the greatness of Sagres and Super Bock brand awareness since both brands overpassed the worldwide known ones, Carlsberg and Heineken. Also, when it came to brand preference, Super Bock was chosen as the favourite of the respondents and Sagres took the second place above Heineken and Carlsberg. When it comes to drinking habits, weekends are, not surprisingly, the time of the week with the biggest consumption of beer, 38% claimed that they only drink beer during the weekend, and then 28.6% drank beer less than once week. On the other hand, 22% had beer 4 to 3 times a week. Regarding drink preference, water took the first place but beer was clearly the preferred one among the alcoholic options (cider, wine, beer and spirits).

Block 2: Regarding the valued characteristics when buying beer, taste had the highest score with 8.47 (on a 0 to 10 scale - this scale was the used one throughout the survey) and price placed second with 7 and the brand came only in 3rd together with convenience (Figure 4-1). Aspects as ingredients, brewing process and the variety of flavours revealed to be of little importance to consumer. However, when they were asked which of those they valued on Sagres, the brand, taste and price were basically a consensus among the majority of the respondents. Despite this matching between valued characteristics and the ones recognized on Sagres, there was a big dispersion about the likelihood of buying a Sagres when they were facing multiple options since the options 'Not likely' and 'Barely likely' together represented around 36% of the sample whereas 'Likely' and

Campo	Média
The brand	6.52
The taste	8.47
The ingredients	3.82
The brewing process	3.38
Price	7.00
Variety of flavours	4.06
Convenience (the location of the store)	6.51

Figure 4-1 - Level of importance of characteristics when buying beer

'Extremely likely' represented nearly 41% and the remaining said 'Somewhat likely'. Also, respondents did not seem concerned about the beer offering of a restaurant when deciding where to eat, since it scored an average of 4.

Block 3: Beer seems to be highly linked to moments of leisure and relaxation since most of the respondents' answers, when asked about the time of the day they preferred having a beer, was 'during the afternoon' and 'at night', which leaves meals out of the equation. In line with this is beer scoring the highest in 'afternoon snack', when linking a drink to a meal, and lunch being dominated by the option 'water', dinner by 'wine' and breakfast by 'natural juice'. Building on this, it came the question to link a location to a drink, and despite having significant dispersion among the answers, there was relevant consensus with some of the options. Regarding beer, 'music event', 'sports event', 'esplanade' and 'bar' were really highlighted by the respondents, which confirms the choice about the leisure moments. Wine had the option ‘restaurant’ basically to himself and when it comes to Spirit drinks, these scored higher than beer on ‘nightclubs’. This is interesting due to the change from bars to nightclubs about what to drink. Finally, linking Sagres to a location ‘music event’, ‘sports event’, ‘beach’, ‘bars’ and ‘esplanade’ were the top options among the respondents, something that could be expected by the opinions regarding beer.

Block 4 and 5: It is visible the difference between Sagres’ perceived values by the respondents through their communication up to the rebranding strategy and from that point on, with the ‘Ninguém nos pára’ campaign. The values ‘patriotism’, ‘traditional’, ‘friendship’ and ‘quality’ were significantly ahead of any others (Appendix 10). On the other hand, the values associated to Sagres after a video was presented showed an incredible growth in values such as ‘youth’, ‘cool’,

Campo	Média
Sagres describes me	3
I feel like I belong to Sagres	3
Sagres is as young as me	3
Sagres is cool	5
Sagres is innovative	4
I like being seen with a Sagres	4

Figure 4-3- Degree of agreement with presented sentences

Campo	Média
Sagres describes me	4
I feel like I belong to Sagres	3
Sagres is as young as me	4
Sagres is cool	5
Sagres is innovative	5
I like being seen with Sagres	4

Figure 4-2 - Degree of agreement with the presented sentences related to the video

‘innovation’, ‘fun’ and even ‘friendship’ showed a 44% increase (Appendix 10). However, there has been a significant decrease in ‘quality’ and ‘traditional’. This change on perception seems to be on its way to acceptance since only 39.2% of them said that they related more to the new image of the brand but taking into consideration that 49% claimed that they either did not or were not sure about knowing the ‘Ninguém nos pára’ campaign there is still plenty of room to grow. Although Sagres seems to have clear perceived values around its brand and on their presented video too, the brand does not seem to be a personal one. The respondents were faced with questions which evaluated the degree of identification with brand and with video presented and the results were really average as it may be seen on Figures 4-1 and 4-2, respectively. When it comes to purchase decision, despite the leaning that respondents had to the new image of Sagres, the likelihood seemed to be unaffected since 36% claimed to be ‘Not likely’ or ‘Barely likely’ to buy a Sagres after the exposure to its new image. 'Likely' and 'Extremely likely' kept on 42% which is an insignificant increase.

Following the survey, nine in-depth interviews were made to one male and one female individual (except Lisbon that had two female respondents) from Porto, Lisbon, Alentejo and Algarve with, ages comprehended between 21 and 27, aiming not only to go deeper on some points and collect qualitative information but also, to analyse potential differences on perception based on area of residence and gender. The interviews had the first four key research questions as its guideline and truly valuable information had been found. Their analysis and findings will be presented below together with the survey's discoveries.

4.1 Research findings

Despite equal greatness on brand awareness, Super Bock revealed to be the respondents' first choice on beer brands giving Sagres the second place. This preference is supported by the 93.4% market share of the two brands combined. According to the sample, the price, the taste, the brand and convenience play the most significant roles on the purchase decision so the duopoly in the Portuguese beer industry may be explained by these four characteristics. As found by the survey

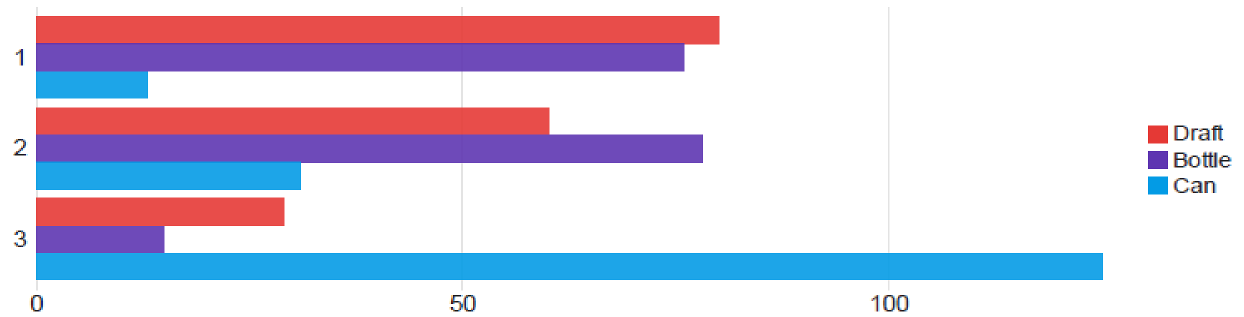


Figure 4-4 - Preference by type of beer

and the interviews, these brands are perceived as good quality ones, they have intensive distribution strategy, they are not priced too high and the taste pleases the Portuguese. Regarding price, the interviews revealed interesting insights since it was found less sensitivity to price on-trade than off-trade. They all valued price as a really important issue, as well as in the survey, but way more on an off-trade scenario where the price over quality ratio was key to purchase. On an on-trade scenario on the other hand, being cold and being the favourite brand was shown to be more important than price. Even the willingness to try different beers with "pretty labels", as one interviewed said, existed meaning that one on scenario the quality is favoured over price and on the other one people search for a good deal. This already gives some indications about consumers' loyalty on the beer the industry, which will be analysed further.

The power of Super Bock and Sagres in Portugal is quite clear however, the preferences for brand change significantly between regions. In the interviews, the respondents from Porto had a clear preference for Super Bock so as all their friends as one mentioned. Super Bock is rooted in the North, really close to Porto, sponsors the city's football team and these factors play a significant role in their 82.3% market share there. This brand also sponsors Sporting Clube de Portugal and that showed to be relevant to one of the Algarve's respondents who said: *'I prefer Super Bock's flavour and it sponsors Sporting, unlike Sagres who sponsors Benfica'*, while the other Algarve respondent had a slightly preference for Sagres. Then, Lisbon respondents all favoured Super Bock whilst the Alentejo ones on the other hand, were unquestionably endorsers of Sagres, they valued their values and image and one of the respondents did not even mentioned Super Bock on brands that he would consider buying. This preference results on 65%[32] market share of Sagres in the area between Lisbon and Algarve, that is mainly represented by Alentejo, which is significantly higher than the national average (Figure 4-4), which reveals a highly geographical preference independent of gender.

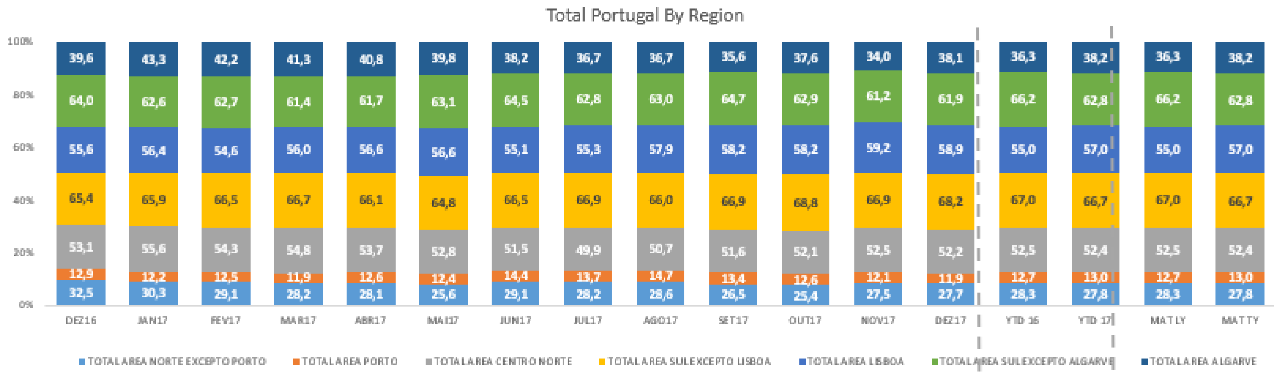


Figure 4-5 - SCC sales in Portugal by region in 2017

Regarding preference for bottled, draft or can beer, this last one was undoubtedly the last choice, but the other two options were really close to each other and the preferences for brand change a lot on the draft scenario. As the interviews allowed to see, when a draft beer is ordered the brand does not play such a strong role as on the bottled beer. In line with this scenario comes the weak importance revealed by the respondents about caring about the beer sold on a restaurant when deciding where to eat. These last two paragraphs allow to take relevant insights about loyalty, which will be analysed in two scenarios, on-trade vs off-trade and bottled vs draft. Starting with a common characteristic among nearly the totality of respondents and interviewed, everybody had preference for a beer brand, but it is safe to say that few would not have a beer if the favourite brand is not available. In almost every case, the preference for a brand speaks higher and both on and off

[32] This an average between the values from South except Lisbon and South except the Algarve

trade the consumer will follow it however, it happens on-trade when the beer is bottled and off-trade when the quality over price ratio is good. When on-trade the beer is usually draft and only one interviewed said that he would rather change to a bottled beer if the draft one is not his favourite brand while the remaining claimed that they would simply ask for a draft beer. When off-trade, price is strongly significant, the decision leans towards a good quality over price ratio, so a better deal may take consumers changing brands. To further investigate the changes on brand, the interviewed were asked what would make them change brands and the results followed the findings on the survey, either the appearance of a brand with better taste or one with better quality/price ratio but curiously, the respondents from the Algarve had an extra insight. Both said that eco-friendly measures and social responsibility would have an impact on their decision as well. Furthermore, all of them claimed that a brand's image changes their willingness to buy, being the inspired trust, quality and self-recognition on the brand and the packaging the highlighted reasons for it.

Beer is mainly seen as drink for leisure moments rather than meals. Those leisure moments are usually during the afternoon or at night and they are at the beach, music and sports events, bars and

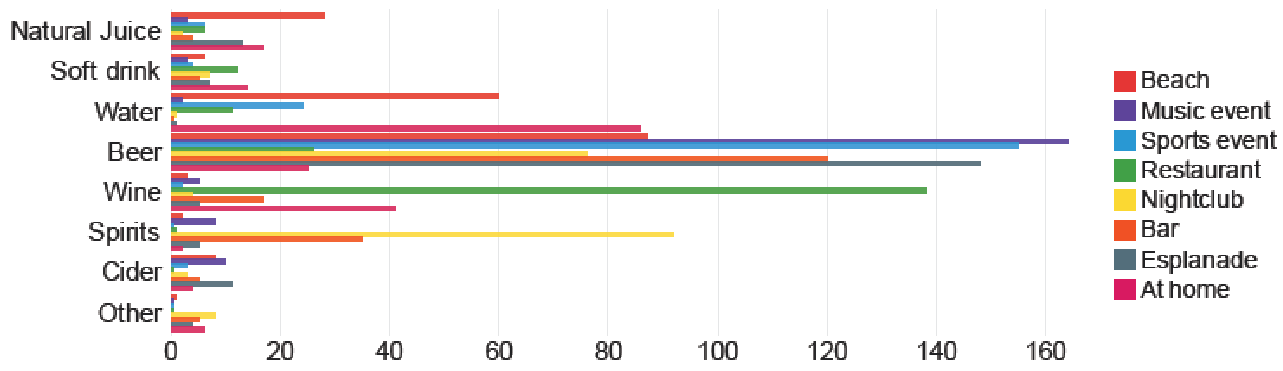


Figure 4-6- Link between drinks and places

esplanades (Figure 4-4). This is not only because of its inherent characteristics, a refreshing and sparkling drink, but also a consequence of the lack of culture about beer present in Portugal mentioned by Filipe Bonina and the reason why the Bohemia line was developed since it was thought to be a beer to go along with a meal. Now that the consumption habits of the respondents were analysed, Sagres' role in it will be too. So Sagres is seen as beer for leisure and relaxing moments, as seen on Block 3 analysis, and so far, it has had as mostly perceived values patriotism, traditional, friendship and quality both on survey and creativity, innovation and football also came up during the interviews. But patriotism, truly national and national pride were always there being the value common to all respondents and interviewed and the fact is that the perceived image of Sagres seem to be changing despite the interviewed agreeing that Sagres kept its values, especially the national pride. Sagres communication is now being built over values and moments important to and valued by generation Y and the message appears to be well understood since the values mentioned about the 'Ninguém nos pára' campaign are somewhat different than Sagres'. Patriotism kept the main role but youth, cool, innovation and fun had a huge jump on respondents' perception. One of the interviewed, who is an entrepreneur, CEO and founder of his own company, even said that the new image seemed *"Fresher, younger, more modern. (I feel) more identified since it relates to my current age and occupation"*, while another one claimed that he recognizes the effort that Sagres is making to follow up the trends of the society and the current lifestyle. Curiously Sagres' new image had distinct preference over the old one from the survey to the interviews since on the first one the "old" Sagres was favoured and on the second one all the interviewed liked the new one more and felt more identified with it. A fact is that 49% of the sample claimed that they did not know or were not sure about knowing the 'Ninguém nos pára' campaign which may indicate that with greater penetration on the consumers' minds, the link between brand and consumer can increase. It is also true that on the interviews, where all had a clear notion on Sagres' change and all belonged to generation Y, the preference tended to the new one due to more self-recognition on the image. So it is fair to say that first of all the changes are being perceived, which is extremely necessary to desired reach the goal, secondly that the changes appear to be perceived as the brand aspires to since it was recognized that Sagres is keeping up with the new trends, lifestyles and the way of thinking of the millennials and thirdly, in spite of levels of self-recognition in the new image are increasing, the likelihood of buying a Sagres does not appear to be neither positively nor negatively affected.

Having found this information, it is now possible to come closer to the main goal of this dissertation, answering the problem statement.

5. Conclusions

To provide the answer to how does Sagres' communication towards young consumers affects their customer loyalty and its impact on sales, there were five pillar questions that together will make the answer possible.

5.1 How do young consumers perceive Sagres?

Most of all Sagres is seen as an authentic Portuguese brand, with a strong character and passionate about transmitting what Portugal has best[33]. It has great perceived quality, it aims to be innovative and creative both in product offering and communication by keeping up with the trends and lifestyle of their consumers, culming up in a trustworthy brand to the Portuguese population both nationally and abroad. It is a brand, that as well as beer itself, is linked to moments of fun, leisure and hanging out with friends and therefore consumers enjoy having a Sagres at music and sports events, at the beach, esplanades and bars. Consumers understand well the values transmitted by the brand and they identify themselves with them. Regarding the characteristics of the product offering, the sample was unanimous and had the taste, the brand and the price as their most valued ones. These characteristics were found to be extremely valued by consumers when deciding on which beer to buy and that is reflected on the brand's market share.

5.2 What are the differences towards the brand geographically?

Despite being quite a small country, Portugal is divided in many regions leading to significantly different lifestyles between them. Through different lifestyles, the mentalities and values of people happen to be different and therefore, with the power that marketing has preferences for brands may vary. In this case, the values about the brand do not change across Portugal but the preference for brand changes. There are two regions which are clearly ruled by one of the two leader brands, Sagres and Super Bock, and these are the interior of Portugal, mainly represented by the Alentejo, and the North of Portugal (from Porto above)[34]. On these regions, there is stronger self-identification with one of the brands for different reasons. In the North, Super Bock rules due to its roots, sponsoring Futebol Clube do Porto and its presence in the region culture. On the other hand, Alentejo has a more traditional way of living, the people are less open minded, and there is leaved a rural lifestyle. The marketing that Sagres had in the past was effective in that area since the market shares are so dominant and the interviewed from that area were really endorsers of the brand by enhancing the brand's values as reasons for preference and because of the content of Sagres' communication tended more to masculinity and Portuguese tradition which has more impact there. Among the rest of the country, the opinions seem more divided with a slight preference for Super Bock on younger generations due to taste and preference for the young and creative communication.

[33] Appendix 9
[34] Appendixes 3 and 4

5.3 How has the rebranding changed the consumers' perception about the brand?

Sagres is a well rooted brand in Portugal, it has a long history in the country, it is a brand with strong equity and it has a great share on consumers' mind. Since a brand is built around values and image one may claim that Sagres' is a strong one due to the homogeneity of results about its values. Having such a strong brand is exactly the goal that most brands in the world search for however, it leads to greater effort when a change is required. By now, the new Sagres is taking its first steps and not everyone has recognized it but the ones who have seemed to understand a big change on the content and values of communication. The participants on both types of research were exposed to the new type of communication and immediately felt differences on the content, the tone and the values. Proof is that the values 'youth', 'cool', 'innovation', 'fun' and 'friendship' were much more related to the video about 'Ningúem nos pára' rather than Sagres itself, whereas 'traditional' had a 75% decrease[35]. Concluding, the generation yers felt more recognition on the communication, there was the feeling of belongingness and representation of the lifestyle thus, the target market is being positively influenced.

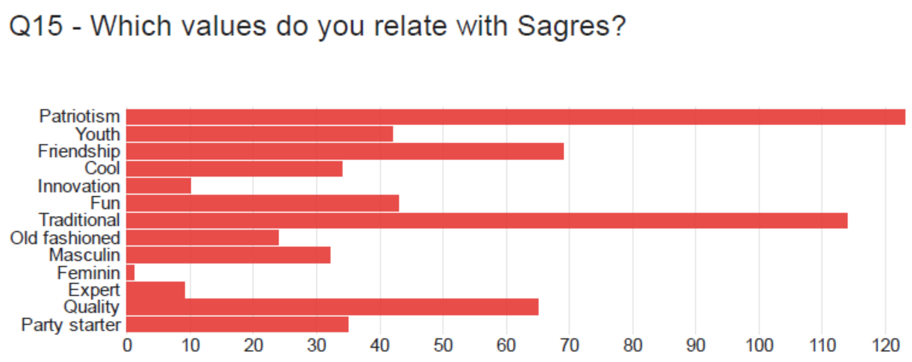


Figure 5-1 - Values related to Sagres

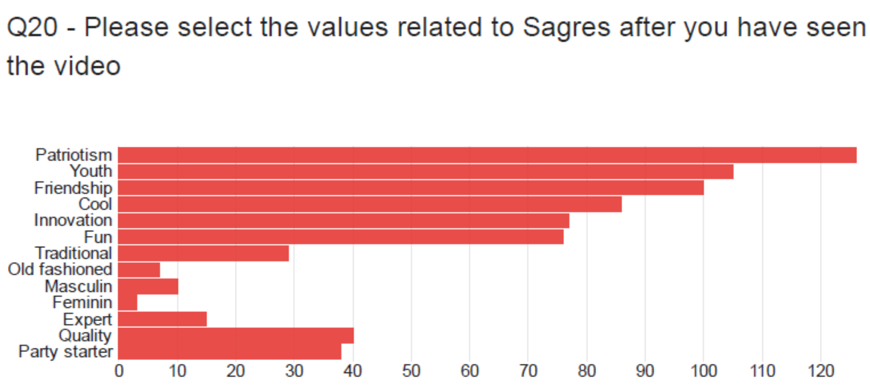


Figure 5-2 - Values related to Sagres after being exposed to Ninguém nos pára video

[35] Appendix 10

5.4 How loyal are consumers to brands in the beer market?

Loyalty to beer in Portugal is not easy to achieve, as Filipe Bonina said, the commodity barrier needs to be broken every day. Since commodities are products with no differentiation, being the price the ultimate decision factor, beer brands try to avoid being seen as such since it would lead to a price war, low margins and a non-prosperous future. Although the effort is real, price is a very important factor on beer, mainly off-trade where there is a bigger search for a good quality over price ratio, but price is not the only important factor on the decision, the brand, the convenience and the taste (most important one) are all taken into consideration. Moreover, the brands are seen as good quality ones, brands the they can trust and self-recognition on the brands' values, these are key elements to achieve brand loyalty on the beer market as literature by (Augusto & Torres, 2017) showed. The two brands that respect all these criteria are Super Bock and Sagres, mainly due to brand, convenience and price since taste is a more subjective criterion that may change individually. From these four factors, consumers tend to lean their preference on one of these two brands and they follow their preference as much as possible, but they acknowledge that whenever it is not possible they change brands. This preference has its share of influence by the brands since it was found that that eco-friendly measures and social responsibility have an impact on the decision and that a brand's image changes their willingness to buy as the inspired trust, quality and self-recognition on the brand increase as well as the attractiveness of the packaging.

Summing up, consumers in Portugal have preference for one of the two main brands, as the results of the market research showed, and the scenario where they are the most loyal is buying bottled beer on-trade since price is likely to not change between the two brands, the convenience is the same (as long as the commercial establishment offers both of them) so the decision is mainly based on the preferred brand. Apart from all these, there are regions in Portugal very loyal to one of the brands as illustrated above.

5.5 Should Sagres invest on this segment?

Sagres was facing a situation where their imminent future was at risk since their most loyal consumers belong to a demographic and psychographic segment that is becoming smaller and smaller due to migration to bigger cities from the rural parts of Portugal, the aging of this segment and evolution/change on the way of thinking, lifestyle and values of the society, especially on generations as the millennials. Also, this generation is becoming the most present one on today's workforce, so the purchasing power is attractive as well. Having chosen this segment, the rebranding strategy took place and it was seen that there is still a long way to go but this generation is receiving the change positively through self-recognition on their values and lifestyle. In line with this comes the willingness to change brands as a brand's image relates more to one individual, inspiring factors that in the long run were proven to generate loyalty by the consumers. Therefore, the investment on this segment is economically sustainable and it appears to be effective on the target market on marketing matters, which will lead to bigger competition with Super Bock since the targets are becoming closer, but a change was needed, and this has all the signs of the correct one.

5.6 Problem Statement

Having answered to all the research questions, there are now enough basis to answer the ultimate goal of this dissertation: How does Sagres' communication towards young consumers affects their customer loyalty and its impact on sales?

According to the literature presented, the basis to achieve brand loyalty from the younger generations are being built. It is true that the market research did not reveal any increase on brand loyalty due to the presence of 'Ninguém nos pára' identity but it is fair to say that brand loyalty is not achieved overnight and there is still a great part of the market unaware of its existence. Summing up, the brand loyalty has not changed yet, but the necessary congruency around the values of the brand and the consumers' exists, so according to literature, it will appear. Regarding the impact on sales, the purchase pattern it is expected to change as brand loyalty increases since the preferences for brand are of extremely importance when buying a beer.

5.7 Limitations and future recommendations

Reaching the objective of answering the proposed problem statement and the sustaining research questions, one may not consider that all the variables were covered and therefore some limitations are presented.

This dissertation is directly linked and dependent on the information provided by the company thus, confidentiality issues made unable the collection of valuable information regarding results and key performance indicators about both previous campaigns and the ones about the rebranding strategy.

The market research also suffered its share of limitations with many non-complete answers on the survey and being spread entirely through social media may have also led to bias on the reach and variety on respondents' profile (94% of the Portuguese respondents lived in Lisbon). The in-depth interviews were truly difficult to conduct and some of them were by phone and message exchange, due to geographical distance, compromising the depth of the answers provided.

In the future, with a deeper penetration of this campaign in national market, it would be interesting to further analyse the perceived image about the brand at that time and evolution of brand loyalty achieved taking into consideration the limitations presented in this study. By then, it would also be possible to see how the differences have changed geographically.

6. Teaching notes

6.1 Synopsis

This case represents a real managerial situation where one of the most powerful brands in Portugal saw its future in danger. Consequently, the brand changed its target to the millennials and started a new era with a rebranding strategy having the new target on sight. This strategy was mainly through marketing so €7.5 million euros were invested to start talking to the biggest generation on earth. The changes happened mainly on the content of the communication, the communication channels, the tone of communication, the sponsoring and the main characters on their marketing. With these changes, the brand is now becoming closer on target with their biggest rival, Super Bock, and they aim at reaching brand loyalty on this segment thus, this case study aims at analysing the impact that the changes on the communication had so far and accessing the levels of brand loyalty achieved.

6.2 Teaching objective

The objectives this case has are to sensitize students to issues of strategic marketing by showing them the need of a rebranding strategy of brand even though it is one of the biggest players in its national market. Furthermore, throughout the case it is explained how the brand reached its strong position on the market and the steps taken to create the new image. Thus, this case study can be studied on marketing coursed whenever related to strategic marketing, targeting the millennials, rebranding strategy, communication mix and brand loyalty.

6.3 Teaching questions

By reading this case, students may be able to apply the gathered information on answering the following questions:

→ At your best knowledge, which were the communication techniques used by the brand to reach its new target and why did they use them?

The answer to this question is found on the Case Study in the insights provided by Filipe Bonina where he reveals the steps taken to change the brand as well as the reasons for the change in content, communication channels, tone of communication and the creation of ‘Ninguém nos pára’. Afterwards, each change should be justified highlighting how each measure will bring Sagres and the new target together.

→ Which were the perceived differences towards the brand before and after the introduction of ‘Ninguém nos pára’?

This answer should be based on the results of the survey where the respondents claimed that they had as the strongest values of Sagres Patriotism, Friendship, Traditional and Quality and as they were exposed to the video of the campaign, the strongest related values were Patriotism, Youth, Cool, Friendship, Innovation, Fun and a great decrease on the Traditional value.

→ How did Sagres became a brand so strongly linked to Portugal? Please answer based on the Case Study.

Throughout the case study are explained the marketing campaigns and its content from the brand so the answer should be based on the effort that Sagres had always building its marketing with a strong link to Portugal. They sponsored the national team and Benfica for years, they create events to watch the national team during international tournaments among many other activities on the sports area. Besides this, their marketing always had as content the pride to Portuguese, enhancing what Portugal has best, they carry a Portuguese symbol as their logo and they have always featured national figures on their communication.

→ Playing the role of the Marketing Director, would you stick to values as national pride and football, keeping them as big pillars of the communication since such a big change was desired?

These are the two biggest assets on Sagres’ communication therefore, identity would be lost if left behind. Thus, the key to the change is to keep these assets but innovating on the way they are presented as Sagres did.

→ How does the company aim to achieve brand loyalty in an industry where the Marketing Director of the brand classifies the product as a commodity?

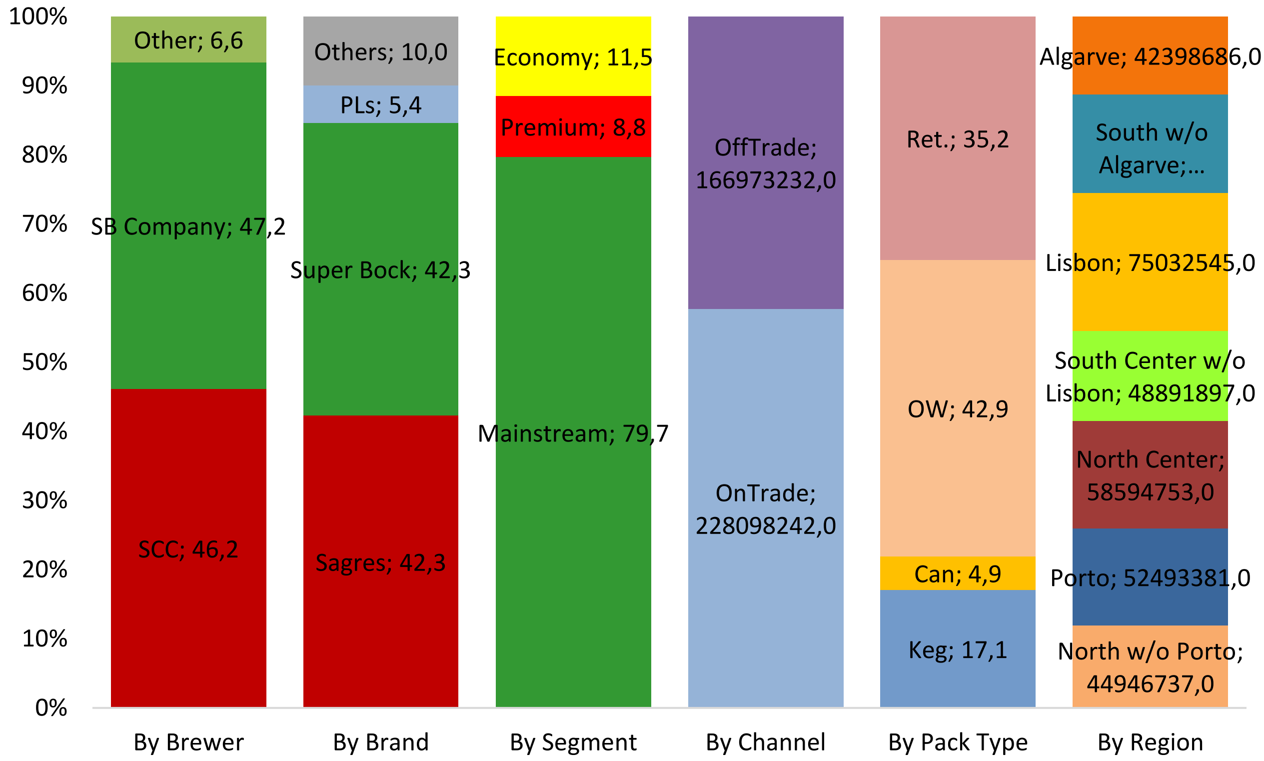
The literature presented revealed that through brand trust, self-recognition and perceived quality a brand has the necessary ingredients to achieve brand loyalty. The research showed that trust and perceived quality were already values associated to Sagres but the new target, as the literature revealed, does not match to the values and content of the previous image of the brand. So, it is through improving the self-recognition that the brand aims to achieve brand loyalty.

→ Having read the dissertation, will the brand thrive with this change since they will now dispute targets more than ever with their biggest rival, Super Bock?

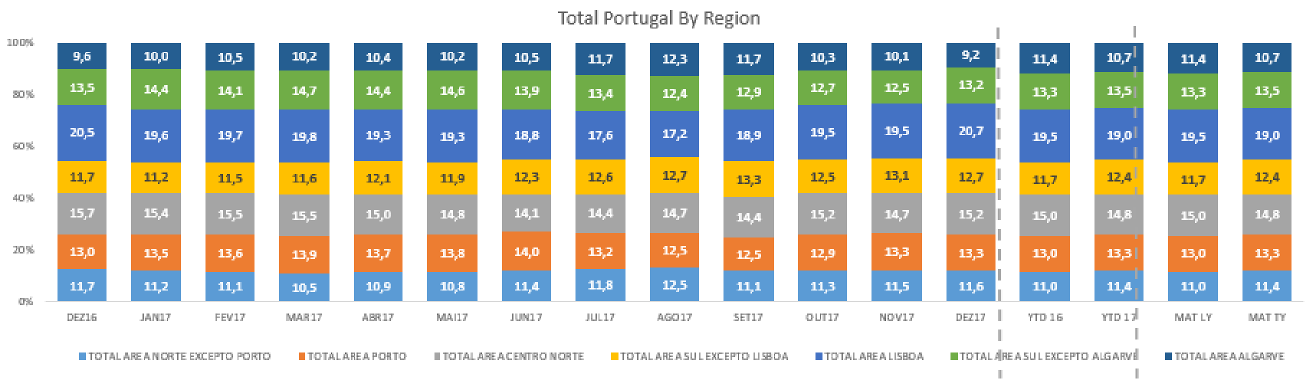
This is answered through one's opinion after reading the case. Considering the literature, the case study and the findings it is expected that the student may have an opinion that should be based on agreement/disagreement with the change of target, the change on the communication and the likelihood to achieve brand loyalty.

7. Appendixes

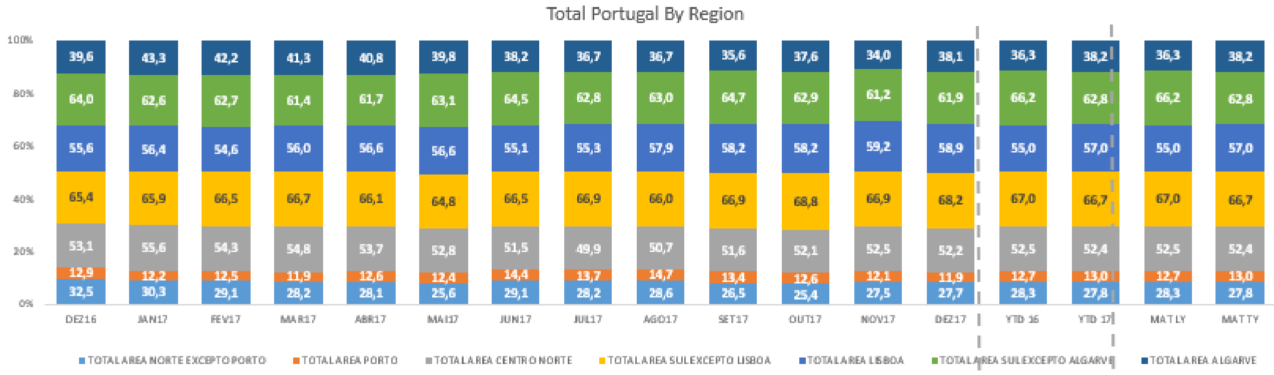
Appendix 1 - Summary of 2017sales on the beer industry. Source: SCC



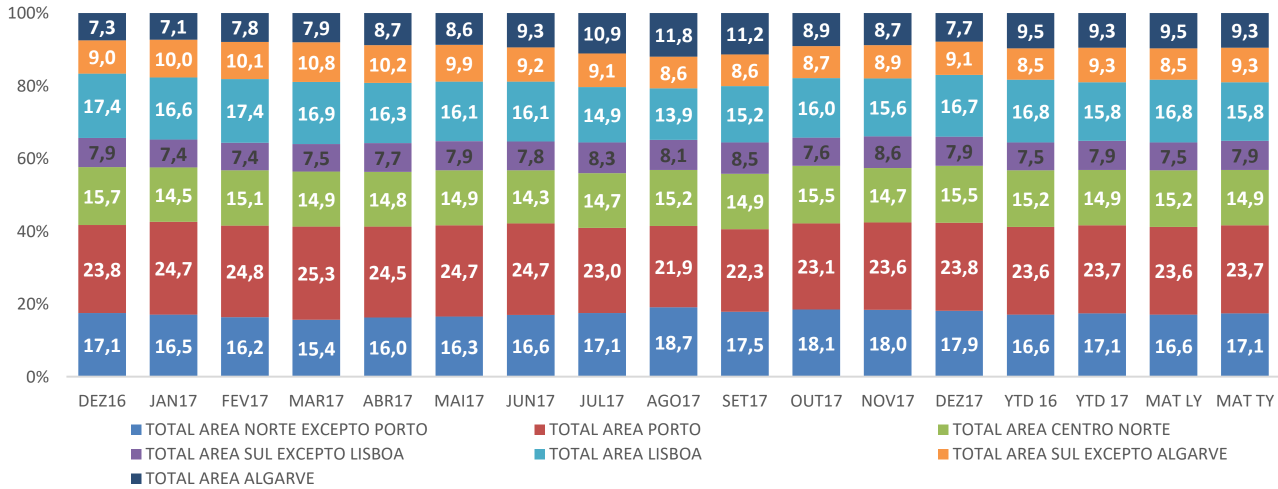
Appendix 2 – Total sales in Portugal by region on the beer industry in 2017. Source: SCC



Appendix 3 – SCC sales in Portugal by region in 2017. Source: SCC



Appendix 4 – Super Bock sales in Portugal by region in 2017. Source: SCC



Appendix 5 – Sagres ao melhor público image. Source: Sagres' Facebook page

Appendix 6 – Sagres portfolio of beers. Source: Sagres' website

Appendix 7 – Sagres merchandising

Appendix 8 – Survey

CATÓLICA LISBON
BUSINESS & ECONOMICS

Bloco 4

This survey is part of my Master Thesis at Católica-Lisbon School Business and Economics and it aims to study the impact of Sagres communication towards younger generations.

All the information provided is anonimous and classified and it is used only for academic purposes. The survey should not take more than 6 to 10 minutes to complete.

Thank you very much for your time and help on answering this survey,

Dinis Gaspar

Bloco de questões por defeito

How often do you drink beer?

Daily
6-5 days per week
4-3 days per week
Only on weekends
Less than once a week

Which beer brands do you know?

Sagres
Super Bock
Carlsberg
Estrella Damm
Imperial
Cristal

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Heineken Marina

Please put in order of preference the drinks below

Beer

Water

Soft drink

Natural juice

Cider

Wine

Spirits

Please rank the following brands in order of preference

Sagres

Super Bock

Carlsberg

Heineken

Estrella Damm

Imperial

Cristal

Marina

Bloco 5

How important are the following characteristics when you want to buy beer?

	0	1	2	3	4	5	6	7	8	9	10
The brand											
The taste											
The ingredients											
The brewing process											
Price											
Variety of flavours											
Convenience (the location of the store)											

From the ones above, which ones do you value on Sagres?

The brand The taste The ingredients The brewing process Price Variety of flavours

Please rank your order of preference on the type of beer

Draft

Bottle

Can

Which types of beer do you like?

Stout

Craft

Pilsner

Beer mixes

Beer with spirits

Non-alcohol beer

When deciding on a restaurant how important are the beer brands offered?

Not important at all Extremely important

0 1 2 3 4 5 6 7 8 9 10

	Not important at all							Extremely important			
Importance of offered beer brands	0	1	2	3	4	5	6	7	8	9	10

When in a bar with multiple brands of beer, how likely are you to buy a Sagres?

Not likely	Barely likely	Somewhat likely	Likely	Extremely likely

Bloco 1

When do you prefer to drink beer?

Before lunch
At lunch
During the afternoon
At dinner
After dinner
At night
N/A

Which drink better suits each meal?

	Natural juice	Soft drink	Water	Beer	Wine	Spirits	Cider	Other
Breakfast	○	○	○	○	○	○	○	○
Lunch	○	○	○	○	○	○	○	○
Afternoon snack	○	○	○	○	○	○	○	○
Dinner	○	○	○	○	○	○	○	○

Which drink better links to each of the following locations?

	Natural Juice	Soft drink	Water	Beer	Wine	Spirits	Cider	Other
Beach	○	○	○	○	○	○	○	○
Music event	○	○	○	○	○	○	○	○
Sports event	○	○	○	○	○	○	○	○
Restaurant	○	○	○	○	○	○	○	○

	Natural Juice	Soft drink	Water	Beer	Wine	Spirits	Cider	Other
Nightclub	○	○	○	○	○	○	○	○
Bar	○	○	○	○	○	○	○	○
Esplanade	○	○	○	○	○	○	○	○
At home	○	○	○	○	○	○	○	○

Regarding Sagres, where do you think it makes sense to have a Sagres?

Beach
Music event
Sports event
Restaurant
Nightclub
Bars
Esplanade
At home
N/A

Bloco 2

Which values do you relate with Sagres?

Patriotism
Youth
Friendship
Cool
Innovation
Fun
Traditional
Old fashioned
Masculin
Feminin
Expert
Quality
Party starter

Please evaluate to what degree do you agree with following sentences

	Not at all									Completely
0	1	2	3	4	5	6	7	8	9	10

	Not at all									Completely
	0	1	2	3	4	5	6	7	8	9	10
Sagres describes me										
I feel like I belong to Sagres										
Sagres is as young as me										
Sagres is cool										
Sagres is innovative										
I like being seen with a Sagres										

Bloco 6

Are you familiar with the "Ninguém nos pára" campaign?

Yes

No

Not sure

Please watch the following video

Please select the values related to Sagres after you have seen the video

Patriotism	Old fashioned
Youth	Masculin
Friendship	Feminin
Cool	Expert
Innovation	Quality
Fun	Party starter
Traditional	

After you have seen the video, please evaluate the degree of agreement with the sentences below

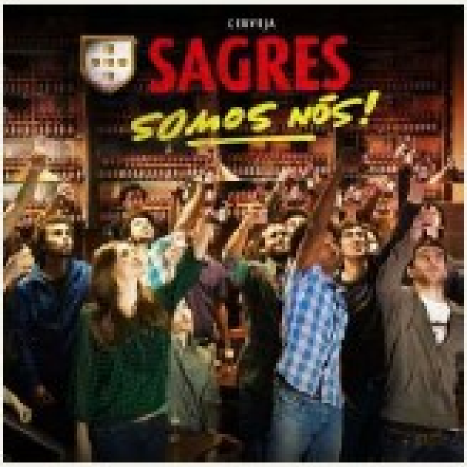
	Not at all									Completely	
	0	1	2	3	4	5	6	7	8	9	10
Sagres describes me											
I feel like I belong to Sagres											
Sagres is as young as me											
Sagres is cool											
Sagres is innovative											

I like being seen with Sagres

Not at all — Completely

0 1 2 3 4 5 6 7 8 9 10

To which image of Sagres do you relate the most?



Now, if you were going to a bar with multiple options of beer, how likely would it be for you to buy a Sagres?

Not likely | Braley likely | Somewhat likely | Likely | Extremely likely

Bloco 3

Gender

Masculin

Feminin

Age

<18

18-28

29-38

39-49

50-59

>60

Do you live in Portugal?

Yes

No

On which region do you live?

North

Porto

Beira Alta/Baixa

Centre

Lisbon

Alentejo

Algarve

Madeira/Açores

Bloco 7

Thank you very much for your time and effort on answering this survey. Your help has been extremely valuable for my investigation and conclusion of my Master programm.

All the best,

Dinis Gaspar

Appendix 9 – In depth interview guidelines

Profile of the interviewed:

Age: Field of education:

Gender: Occupation:

Area of residence:

Interview:

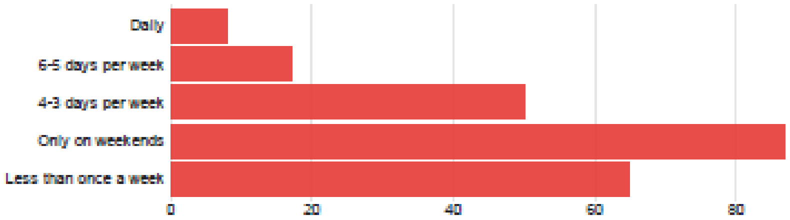
1. How do you see Sagres as a brand?
2. Which are the values that you think Sagres has?
3. Do you identify yourself with those values?
4. Does the new image of Sagres represent those values?
5. How does this change in image makes you feel? More identified?
6. What do you like/dislike on the previous and new communication?

7. Do you have brand preferences on beer? Why or why not?
8. What would make you change brands?
9. Which brands do you consider buying?
10. Do you drink always the same brand or do you change frequently? Why?
11. How determinant is price when you are buying beer?
12. What aspects do you take into consideration when you are buying beer on-trade vs off-trade?
13. How important is the brand when asking draft beer?

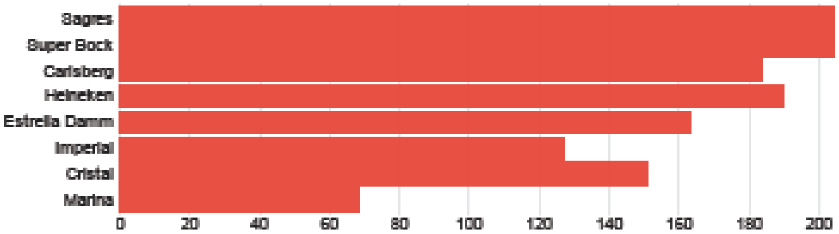
14. Does a brand's image affect your willingness to buy?
15. Does this change in the brand affect your willingness to buy?
16. Do you mind when your preferred brand is not available?

Appendix 10 – Survey Results

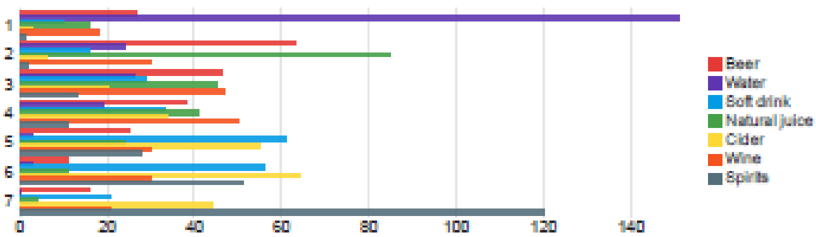
Q4 - How often do you drink beer?



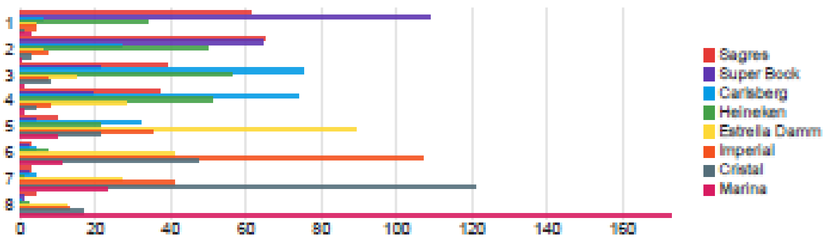
Q1 - Which beer brands do you know?



Q2 - Please put in order of preference the drinks below



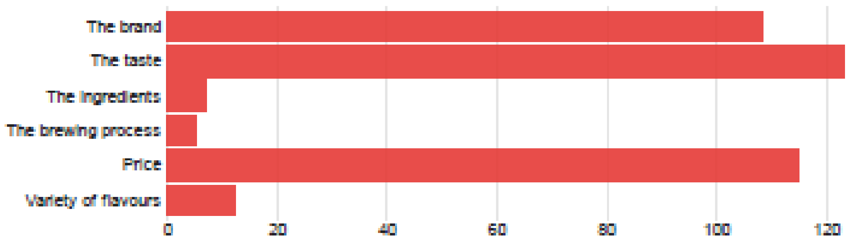
Q3 - Please rank the following brands in order of preference



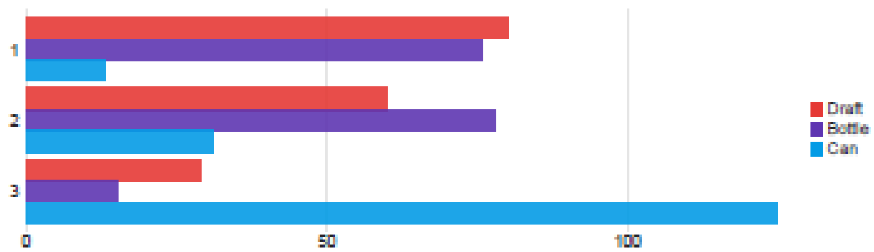
Q6 - How important are the following characteristics when you want to buy beer?

Campo	Média	Respostas	Máx.	Mín.	Desvio padrão	Variação
The brand	6.52	203	10.00	0.00	2.56	6.54
The taste	8.47	206	10.00	0.00	2.08	4.32
The ingredients	3.82	196	10.00	0.00	2.83	8.02
The brewing process	3.38	191	10.00	0.00	2.72	7.39
Price	7.00	203	10.00	0.00	2.46	6.07
Variety of flavours	4.06	192	10.00	0.00	2.98	8.89
Convenience (the location of the store)	6.51	198	10.00	0.00	2.91	8.48

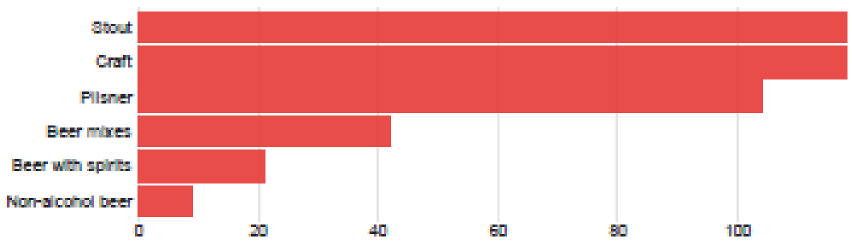
Q7 - From the ones above, which ones do you value on Sagres?



Q8 - Please rank your order of preference on the type of beer



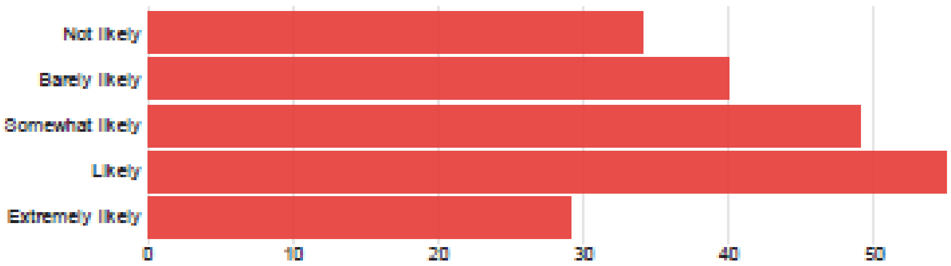
Q9 - Which types of beer do you like?



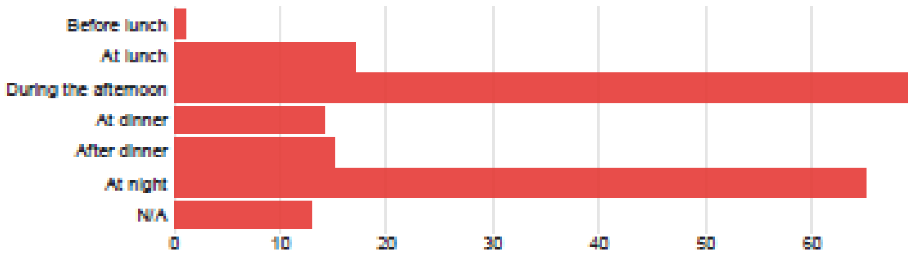
Q30 - When deciding on a restaurant how important are the beer brands offered?

Campo	Média	Respostas	Máx.	Mín.	Desvio padrão	Variação
Importance of offered beer brands	4	207	10	0	3	10

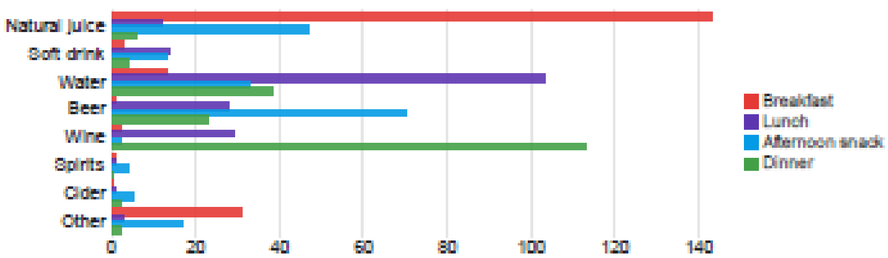
Q28 - When in a bar with multiple brands of beer, how likely are you to buy a Sagres?



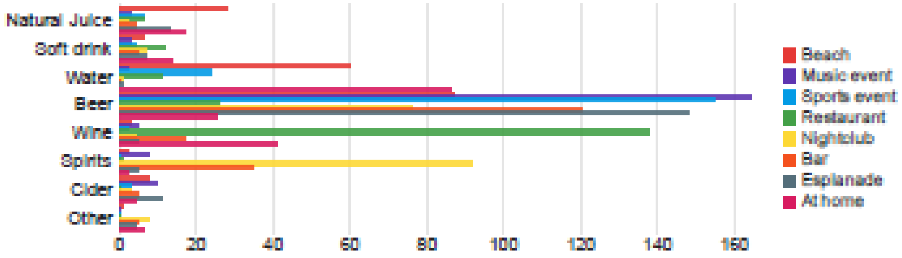
Q10 - When do you prefer to drink beer?



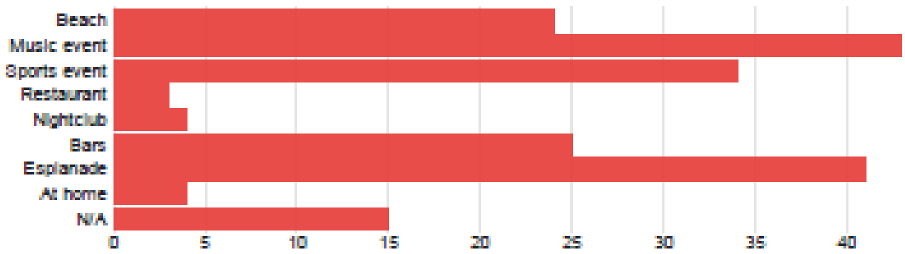
Q11 - Which drink better suits each meal?



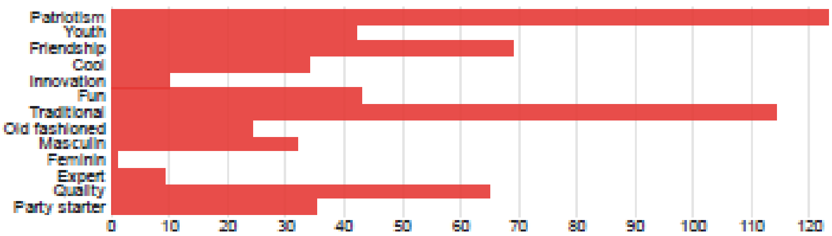
Q12 - Which drink better links to each of the following locations?



Q13 - Regarding Sagres, where do you think it makes sense to have a Sagres?



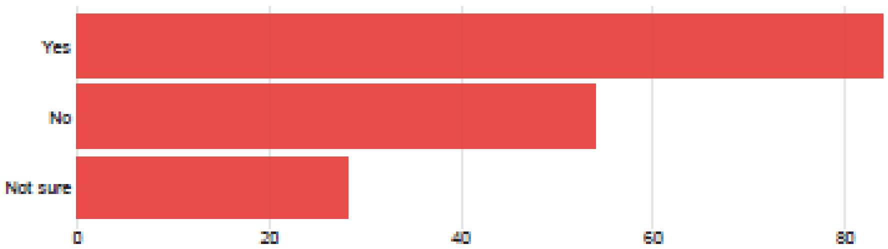
Q15 - Which values do you relate with Sagres?



Q16 - Please evaluate to what degree do you agree with following sentences

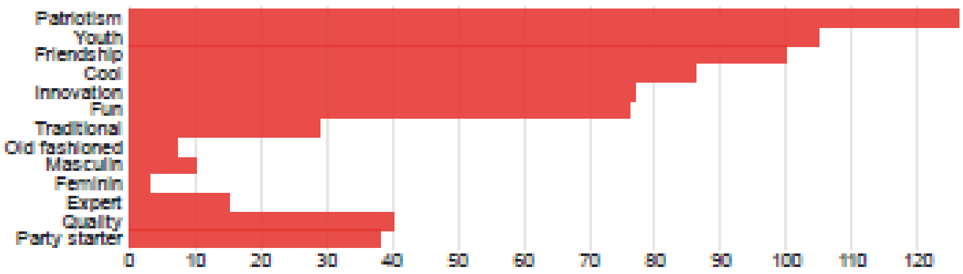
Campo	Média	Respostas	Máx.	Mín.	Desvio padrão	Variação
Sagres describes me	3	186	10	0	3	7
I feel like I belong to Sagres	3	186	10	0	3	6
Sagres is as young as me	3	186	10	0	3	9
Sagres is cool	5	187	10	0	3	9
Sagres is innovative	4	186	10	0	3	8
I like being seen with a Sagres	4	186	10	0	3	9

Q17 - Are you familiar with the "Ninguém nos pára" campaign?



The presented video: https://www.youtube.com/watch?v=IFSmJSXvUWg

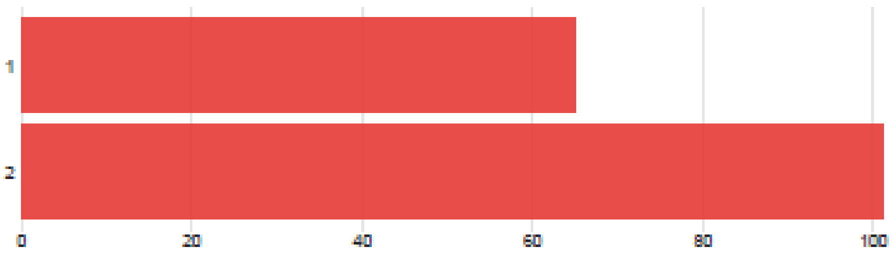
Q20 - Please select the values related to Sagres after you have seen the video



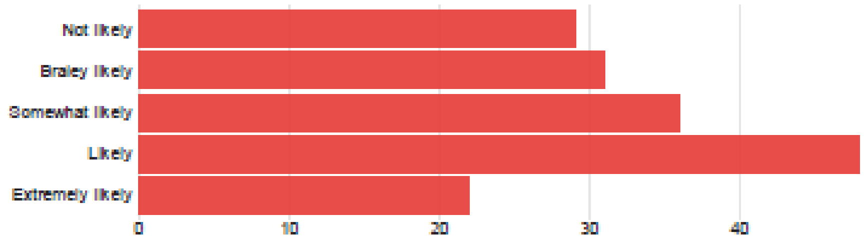
Q25 - After you have seen the video, please evaluate the degree of agreement with the sentences below

Campo	Média	Respostas	Máx.	Mín.	Desvio padrão	Variação
Sagres describes me	4	165	10	0	3	7
I feel like I belong to Sagres	3	165	10	0	3	7
Sagres is as young as me	4	165	10	0	3	8
Sagres is cool	5	165	10	0	3	8
Sagres is innovative	5	165	10	0	3	8
I like being seen with Sagres	4	165	10	0	3	9

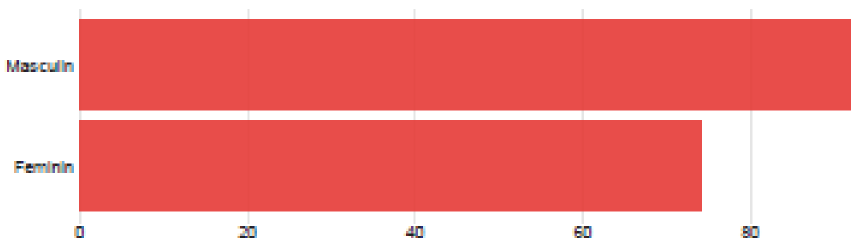
Q27 - To which image of Sagres do you relate the most?



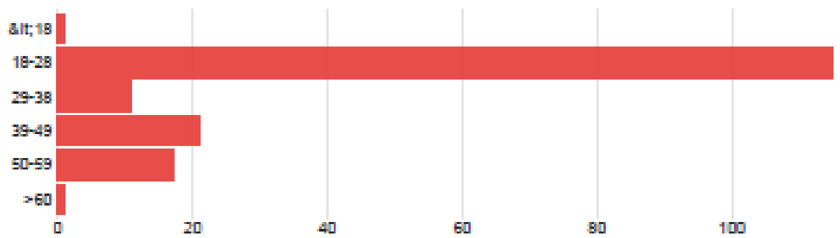
Q29 - Now, if you were going to a bar with multiple options of beer, how likely would it be for you to buy a Sagres?



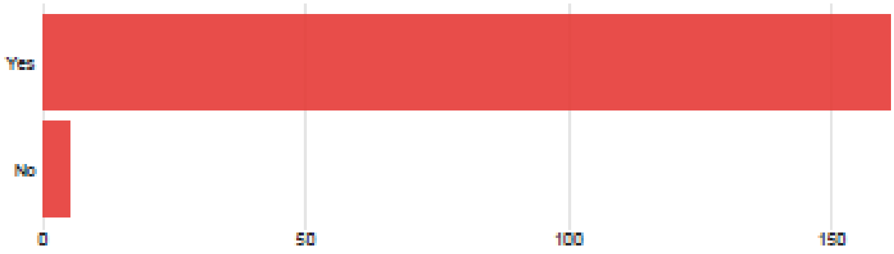
Q31 - Gender



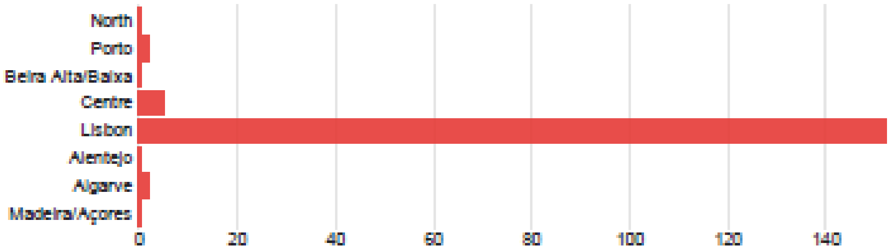
Q32 - Age



Q33 - Do you live in Portugal?



Q34 - On which region do you live?



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