

## Rebranding The Ice-Cream – Effects on The Consumer Behaviour: A Case-Study in The Portuguese Market

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### Abstract

This work describes the consequences of the rebranding of the leading ice-cream brand in Portugal, Olá (part of the Unilever Portfolio). Using the focus-group methodology the old and new brand were tested trying to grasp consumer's perceived impacts, as well as the list of attributes each brand is associated with. The evolution of ice-cream eating behaviours from the consumer's point of view was also analysed; the consumption patterns changed in the last years due to the attempt of deseasonalization of demand by market players on the supply side more than spontaneous changes on the demand side. Ice-cream consumption in Portugal was traditionally, and still is, highly affected by seasonality, being more associated with summer time. However, today, several brands try to reverse this tendency. Olá did some of the most significant changes in the Portuguese market (although it was not solely meant for local purposes) with its rebranding and changing the commercial and marketing strategy and tactics, thus driving market changes.

39

### Résumé

Ce travail décrit les conséquences du rebranding de la marque la plus vendue des glaces au Portugal, Olá (partie du portefeuille Unilever). En utilisant le focus-groupe comme méthodologie d'essai nous testons l'ancienne et la nouvelle marque et tentons de comprendre les impacts sur les consommateurs, ainsi que la liste d'attributs perçus. On a également analysé l'évolution des comportements du consommateur de glace, de son point de vue ; les modes de consommation ont changé au cours des dernières années, plus en raison des efforts de dessaisonnalisation de la demande faits par les acteurs du marché du côté de l'offre que des changements spontanés. La consommation des glaces au Portugal a été traditionnellement, et elle est encore, fortement touchée par la saisonnalité. Toutefois, aujourd'hui, plusieurs marques essaient d'inverser cette tendance. Olá a fait des changements beaucoup importants sur le marché portugais (bien qu'ils ne soient pas uniquement destinés à des fins locales), avec le rebranding et l'évolution de la politique commerciale et de marketing, en aidant le marché à se développer.

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### Introduction

The first ice-creams were produced by the Chinese over 3000 years ago; they consisted on a mixture of snow with fruit and honey; in ancient Egypt pharaohs offered their guests fruit juice cooled with snow; roman emperor Nero (37-68 A.D.) sent for snow from the mountains and combined it with fresh fruits (ANIGA, 2008). In fact if there is some form of consensus around the ice-cream's country of origin that is not true on who brought it to Europe. Some sources say that Marco Polo, an Italian traveller from the XIIIth century, introduced ice-cream in Europe when returning from China; other sources say that the responsibility to the ice-cream introduction in Europe should be given to the Arabs (Idem, Ibidem). The word "gelato" (Italian for iced or frozen) first appeared as a reference to the product in the XVIth century amidst the Medici Family from Firenze (Italy); a hundred years later Procopio, from Palermo (Italy), invented an apparatus that achieved substantial improvements on the ice-cream quality; throughout the years ice-cream suffered various changes incorporating milk, cream and eggs; over the last 400 years the discover that a mixture of ice and salt in a container could produce temperatures below 0 degrees Celsius transforming milk, eggs, creams and sugar into ice-cream revolutionized its production; as a result the first ice-cream production utensil is created consisting of a copper container inside a wooden container and amid them ice and salt; it was not until the year 1813 that Kelvin, an American, produced the first ice-cream machines by using the principle that a gas spreading produces cold temperatures (Nosolo Gelato, 2008). The ice-cream probably arrived in Portugal during the Filipina dynasty (1580-1640) when snowy drinks were very successful; by the year 1715 there were already numerous ice-cream producers in the Portuguese capital city, Lisbon (ANIGA, 2008).

The United States of America have the world's highest ice-cream consumption, totalling about 24 liters per capita per year. Europe's average consumption is around 6 liters per person. In Portugal it totals 4 liters per person. Unilever's ice cream business is the largest in the world, worth 4,4 billion Euros globally with a 17% market share; Unilever offers 2000 branded ice cream products across 41 markets globally. The portfolio includes some of the most well-known ice cream brands in the world such as Magnum, Carte d'Or, Cornetto, Breyers and Ben & Jerry's; Nowadays the HeartBrand, as represented by the unique heart logo, unifies Unilever's different ice cream products across the world and operates under different names in various markets, such as HB in Ireland, Wall's in the UK and China, Algida in Italy and Central Europe, Langnese in Germany, Frigo in Spain, Kibon in Brazil, Ola in the Netherlands and Olá in Portugal; Unilever Ice cream contributes

20% to Unilever's food portfolio in terms of sales and 10% to the overall company portfolio (Unilever, 2008).

Common sense can tell us that ice-creams are a popular and widely accepted product. But recent findings of a neuro-marketing study commissioned by Unilever at the Centre for Neuroimaging Sciences, Institute of Psychiatry, London, using Functional Magnetic Resonance Imaging, allowed researchers to see which areas of the brain were activated when participants consumed Vanilla Carte D'Or ice cream; The results showed that eating ice cream has an immediate effect on parts of the brain that previous research has shown are activated when someone is really enjoying themselves - the pleasure areas - which include a major processing area at the front of the brain, the orbitofrontal cortex (Unilever, 2008). This physiological support for the pleasure of ice-cream eating is no surprise for the legions of fans worldwide, but can now be used as an excuse for that extra spoon or lick. Nevertheless, investigating peoples self-reported emotions and attitudes behind every consuming behaviour is still of great importance even if speech passes to the brain once again before it meets the action. Ice-cream consumer's interpretation of the feelings and emotions may be the key for the proposition of the right communication appeals.

### The Portuguese Market

The Portuguese ice-cream market is changing: the sector, worth approximately 250 million Euros per year is lead by Unilever/Jerónimo Martins, with the Olá brand (representing 150 million Euros) and investing about 12 million Euros in communication; Olá stands for 62% of the Out home (Impulse) channel and 47% of the Take-home channel; there are 150 million consuming acts per year; in average summer sales represent 60% of all year round sales, meaning that in each summer month Portuguese consumers eat three times more ice-cream than in the average regular month; the Take-home consumption is growing and slowly consuming profiles are changing and Olá is growing above the market growth. Per capita ice-cream consumption is reduced when comparing Portugal with other European countries. The Portuguese market is much oriented to the Impulse consumption in the HORECA (and similar) channel. In northern Europe per capita home ice-cream consumption almost quadruplicates. Our common sense would emphasize that weather conditions are favouring this reality, justifying that Portuguese people eat more ice-cream outdoors because of the mild climate. However, this justification does not answer the question: "Why do Portuguese people eat much less ice-cream on winter time and why do they eat less ice-cream at home than other European countries?" Previously to a multi-cultural or cross-cultural approach, we intend to understand the inner market consumer point of view, knowing when and how do people eat ice-cream. In addition we will try to understand the recent market changes that attenuate, not eliminate, seasonality, and the reasons behind the growing consumption at home. What triggered this from the consumer's point of view? The number of households that eat ice-cream more than doubled in the last

years but it reaches only 54% of the total households (Marktest, 2008). According to some experts, the volume of ice cream consumed will grow increasingly with the enhanced people's living standard and consumption standard. Therefore, we would expect that the socio-economic evolution in Portugal could be the foundation for the ice-cream market changes when accompanied by the company's strategic and operational marketing efforts.

Worldwide marketing opportunities in the ice-cream industry seem rather well known: 1) Removing the need for seasonality; 2) Targeting impulse; 3) Targeting families and 4) Promoting pleasure and experimentation (Global Market Review of Ice-Cream – Forecasts to 2012, 2008). The main market growth drivers are: 1) Health: fortification, low and light, whole and natural; 2) Fruit flavours: encourage consumers to feel less guilty about their purchase; 3) Functional and fortified ice cream; 4) Indulgence, luxury and premium ice cream; 5) Getting ethical to attract more consumers to your brand, 6) Convenience (idem, ibidem).

### Meaning and Objectives

The purpose of this exploratory research is the attempt to better understand the ice-cream consuming patterns in the Portuguese market. Our main concern was to identify if the contexts of consumption and products have changed over the years in the consumers subjective point of view. Do people eat ice-creams now as they did in their childhood? Is ice-cream different now? This and other questions can help us to understand the markets evolution from a consumer perspective decoding some brand strategies for these seasonal markets and hopefully provide directions for other products and markets. This study is a preliminary research in an intended more profound study on ice-cream consuming patterns in Portugal. The research design is necessarily flexible in order to adapt itself to the findings and the possibility of discovering new perspectives. The aprioristic definitions will be continuously reequationed forming the theoretical core in its final version also consolidating the conceptual framework and analysis indicators thus finalizing the analysis model. The validation of this model will obey to a rigorous empirical scrutiny according to the Grounded Theory (GT) orientations, proposed by Barney Glaser and Anselm Strauss; after the joint publication of the book “The Discovery of Grounded Theory” in 1967, the authors constructed several operationalizations of the GT model (Kelle, 2005). Strauss defends the imposition of a prior coding system, known as the coding paradigm, leaving the investigator with the task of finding causal senses, phenomena, data contexts and consequences; Glaser defends the perspective where everything is data thus building the coding system concomitantly with the substantive codes emergence for the actual situation being studied (Kelle, 2005). Far from looking for the epistemological truth we will use a compromise between the two perspectives working with a previous theoretical framing but never ignoring the new data achieved in the study. This systematic method searches for legitimating the qualitative research enabling a theoretical construction from the data

collected with formal or substantive theoretical models. We did not use a previous forced deductive coding system thus exploring new categories emerging from the focus-groups. Our previous knowledges are a framing heuristic facilitating the analysis but not to the point of contamination (as proposed by Kelle, 2005): “Thereby, the researcher may start qualitative analysis by using heuristic concepts and may then proceed to the construction of categories and propositions with growing empirical content. In this process grand theories play the role of a theoretical axis or a “skeleton” to which the “flesh” of empirically contentful information from the research field is added in order to develop empirically grounded categories and propositions.” (Kelle, 2005, § 40).

Consumer’s perceptions are of the utmost importance in Marketing dominating various realms like, for example, the notion of quality (Charters & Pettigrew, 2006). The focus-group technique was elected in order to understand the specific consumer’s vocabulary regarding ice-cream and provide an insight into their attitudes and perceptions. The intentions of the focus group were: i) to develop an effective knowledge on the relevant dimensions of ice-cream consumption and consumer perception and ii) collect relevant information to support and validate the future survey instrument(s). Each brand is a collaborative construction by many parties (Wilk, 2006, p. 305); with this framing we intend to know the consumer’s brand perception. Olá’s brand spontaneous notability is particularly high amongst the participants of this study; when asked to refer an ice-cream brand 100% of the respondents referred Olá in the first place.

### Design of the study

This exploratory study comprised two different parts:

1. Content analysis of Olá’s Television (TV) commercials: Four (4) group viewing sessions were organized totalling 107 college Marketing graduation students. 20 TV advertisements of different decades were gathered being 4 from the seventies, 5 from the eighties, 5 from the nineties and 6 from our decade. This reduced sample is due to time contingencies of the screening sessions and the effort to restrain the amount of information to be processed thus enabling more profound and fruitful discussions. The items were viewed twice: on the first time the 20 commercials were viewed in a row without any comments or writing; on the second time for each decade represented there was a group discussion and notes were taken. The sessions were moderated like focus-groups with the necessary methodological changes. Student’s descriptions and references were logged and analysed.

Content analysis is a research technique for the objective, systematic, and quantitative description of the manifest content of communication (Berelson, 1952); however objective the intention of the analyses is it cannot undermine the subjectivity of the process, thus the numbers presented should not be regarded as precise gauges of the variables studied but rather as general measures of magnitudes and trends (Peterson, Ross, 1997, p. 428). The

post-it technique (to facilitate the expression) was used on the brand values and attribute perception. The coding was made by two independent judges and results compared with the use of the raw percentage of agreement (>87% - considered reliable according to Kassarian, 1977) and final categories were encountered within the overlap of the two coding propositions.

From the possible units of measurement in consumer research: word, theme, character, item or space and time measurements (Kassarian, 1977) the one selected for this study was the item (whole TV advertisement); however, the analysis of the advertisement as a entire unit does not imply that no characters analysis is done specially on their symbolic nature. Given the number of TV advertisements (20) and the uneven distribution by different decades the absolute or relative frequencies are not of a specific importance by itself and that is a main reason to consider the whole item as the unit of analysis and grasp the focus and locus of the contents or appeals. The final analysis scheme comprised nine different categories: i) cultural adaptation vs. standardization, ii) myths and rituals, iii) gender role, iv) family and friends role: life cycle, companionship or kinship, v) social classes: life styles, vi) collective or individual values, vii) product/price characteristics, viii) emotion drivers: sense of newness, popularity and ix) health and well being (The importance of this item in a consumer socialization context is well sustained in Marshal et al, 2007). Each TV commercial was analysed using the complete set of items/appeals, regardless of the empty loadings on a specific item in a specific advertising or decade; none of the final codes was empty in the overall analysis.

2. Focus-groups on consumer behaviour and market perceptions: The second stage of the study consisted on four (4) focus groups conducted between May and July of 2008. The final script was first tested in April of the same year. The group interviews totalled twenty-six (26) individuals. Participants were mainly recruited by the refer-a-friend method, consisting on a non-probabilistic convenience sample (the author friends and colleagues were asked to refer a friend to whom he was not acquainted). To be included in the study individuals should have more than 24 and less than 45 years and be a member of the A, B or C1 social classes (the age span was selected according to the market information regarding the age groups that eat more ice-cream; the social class was assessed by the reductionist but easily analysed social-economic criteria of Formal Education and Profession). The groups were intentionally homogenised on the basis of these generic criteria thus favouring the discussion amongst participants. In spite of the known implications in attitude change (polarization or depolarization) caused by focus-group interactions this was the elected technique (Bristol & Fern, 2003); the moderator used a standardized protocol with a low involvement approach and prevented biasing effects such as social conformity. The sessions were videotaped with participants consent; the data analysis was based on transcripts, thus providing an expected high level of rigor and low risk of error (Krueger, 2008). The data analysis did not incorporate situational factors at all



times as proposed by Vicsek's model because of the complexity and time consumption of the process (Vicsek, 2007); the analysis therefore included Interactional factors, Characteristics of the participants, Content and Moderator and let aside Environment and Time factors. As referred before the coding was made by two independent judges and results compared with the use of the raw percentage of agreement and final categories were encountered within the overlap of the two coding propositions. The software used in the coding process was MAXQDA2007 and the transcripts were made using the Transana 2.22 software version. The post-it technique (to facilitate the expression) was used on the brand values and attribute perception. Focus-groups were formed to discuss ice-cream consuming behaviours, whether in the Impulse or the Take-home channels, analysing possible evolutions in the latest years. The habits and hows were questioned and framed with the perceived strategies of the market players.

## Results and Discussion

1. Content Analysis of TV advertisements: The analysis showed that throughout the seventies, eighties and early nineties ice-cream TV advertisings had a local adaptation and explicitly referred summer or warm days. In the last years the tendency changed to global and ethnic references, with exotic backgrounds and not locally bounded, enhancing the emotional themes. Can different markets be persuaded with the same advertising message or should it reflect the local culture and references? Many analyses have been made with different markets and products (cf. Gupta and De, 2007) However, this discussion is really upstream the one this article is meant for. The intention is to objectively analyze a sample of Olá's commercials detecting whether its appeals have been changing and subsequently overlap it to consumer's perception of the different dimensions encountered.

Table 1 is a result of the condensation of all references distributed by dimensions and grouped by decade. It is possible to underpin an evolution throughout the decades concerning various aspects: i) cultural adaptation is largely being replaced by global or international references; ii) there is a continuous increment on the use of myths and symbolism in high context messages; iii) there is a push upwards the social class ladder depicting increasingly sophisticated characters; iv) product characteristics are less spoken and more shown by imagery or metaphors; v) health and well being is a major concern in children's products communication.

Decade	Cultural Adaptation vs. Standardization	Myths & Symbolic Rituals	Gender role	Family and Friends	Social Classes & Life Styles	Collective or Individual values	Product & Price Characteristics	Other Emotion Drivers	Health and Well being
70's	Cultural references are adapted	None registered	Marginal imagery of Women as child care/food	Social consumption is depicted most commonly	Middle and Upper class life style depicted; recreational themes, mostly	Mostly collective values prevalent	In the early 70's: references to a wide range of prices for	"I want" phrase connected with successful	Marginally revealed by the use of exclusively young,

			provider; subtle and possibly unwanted references of male domination; ice-cream as a gift from men to women	amongst friends; Every ice-cream consumption is a party	holidays at the beach or summer strolls on a warm day		every pocket; cream, fruit and chocolate flavours; deliciousness; freshness	emotional relations	beautiful and healthy people
80's	Global references included; mixtures of national and international items in the same advertisements	Use of authority characters caught eating ice-cream; use of animal mascots and devilish but friendly creatures	Subtle references of male domination; women lead by men; the power of women seducing men	Social consumption as a main feature; first appearance of images of lonely self-indulgence; the all family appears together in all of the possible phases, with or without children, young or old; parents appear caring for their children	Middle and Upper class life style depicted; all contexts of relaxation or party; beach scenarios still prevalent; countryside scenarios appear still on warm days	Mostly collective values prevalent; individual consumption appears seldom	Freshness, deliciousness, sweetness, creaminess	Eating ice-cream equals fun; more profound lyrics accompany jingles reciting various product characteristics and its ability to set a good mood	Marginally revealed by the use of exclusively young, beautiful and healthy people
90's	International references, global contexts; only real Portuguese feature are voice-overs and on-screen phrases	Growing use of fictional characters with magic powers specially in children's orientated products	Woman is depicted in equal terms with men	Social consumption is underlined; individual consumption is scarcely depicted	Middle and Upper class life style depicted; recreational themes; beach is very much present but is more accompanied by other scenarios	Collective values expressed	Sweetness, creaminess, chocolate	Routine defrost; tenderness	Health is not an actual issue although every character depicted is in good health and reveals life quality and stamina
After 2000	International references, global contexts; local advertisements mainly for exclusive local products (classics) or local competitions	Abundant use of mythological characters and symbolic figures; ice-cream consumption appears as a grooming ritual; communication is highly contextual	Women play a central role, specially in premium products advertisements; exploration of femininity with a sexual perspective	Non existing traditional whole family depictions; however in the specific Portuguese classics intended for children mom's have a saying	With the communication effort on premium products there is a rise on social class; ice-cream is glamorous, flamboyant	More individual values are expressed; self indulgence or instrumental consuming is shown	Chocolate, crunchiness; on children products milk and nutritional values are reported in a low context message	Music is international and acts as support not relying on lyrics specially made to fit the products, it enhances the advertisements notability and familiarization	Mostly present on children's products

Table 1. Summary of the interpretation of content analysis results on TV advertisements by coding categories



The following figures are a visual interpretation of the absolute frequencies of references made to each brand attribute. The arrow distance is a graphic measure of the centrality or peripherality of each item (distances are intended to be only for proportional identification).

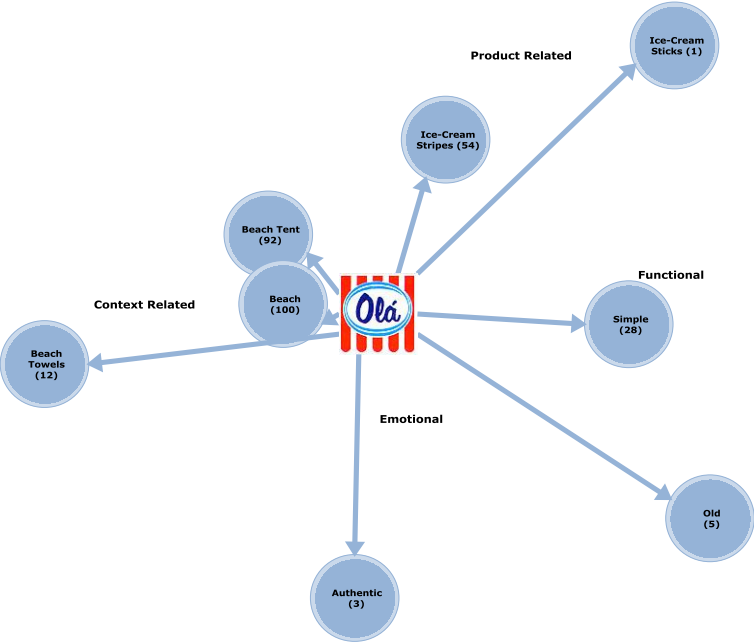


Figure 1. Scheme for brand's perceived attributes (old brand)

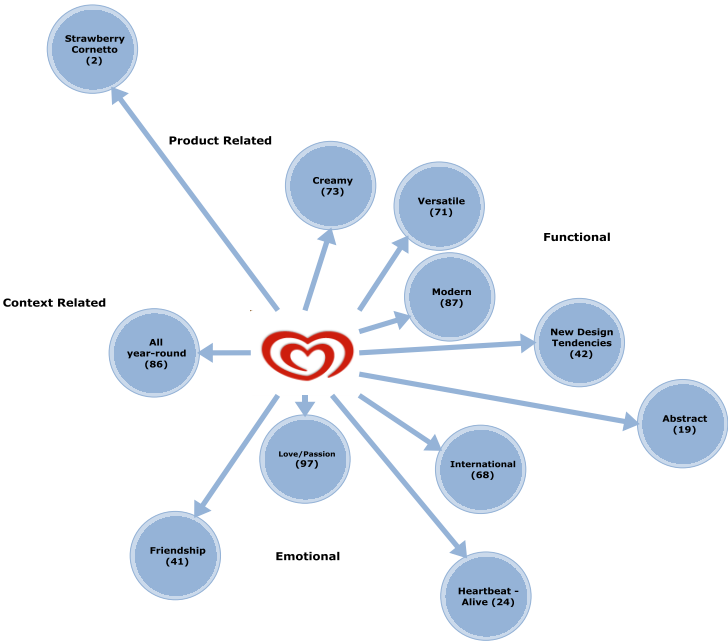


Figure 2. Scheme for brand's perceived attributes (new brand)

A change in the attributes perceived is notable: i) Olá's old brand stands much more for context related items and those specifically related to beach, therefore summer, whilst the new brand loses seasonal context and gains all year round identity; ii) emotional attributes are by far more expressive in the new Heartbrand; iii) the new brand products/brand overlap has a creamy perception favouring one of the most wanted features in the industry and iv) the new brand is regarded as modern, trendy and international although it has lost a vestigial trail of authenticity nostalgia.

2. Focus-Groups on consumer behaviour market perceptions: Guided to talk about their past and present personal ice-cream consumption behaviours the focus-groups members established a comparative perspective stressing various important discussion topics. The passages transcribed below result from a random selection of the examples on every category of analysis.

Focusing on the ice-cream eating patterns consumers told that in recent years the Take-home buying increased:

"I now eat more ice-cream at home. A few years ago we only bought Vienetta (an Olá's product) for parties. Now it's usual to have and eat ice-cream on regular days, well at least on regular weekends." R. - focus group #4.

"There is much more variety now. I buy those one liter (1 lt.) chocolate flavour and brownies chunks boxes. It's a good meal (laughs)." M. - focus group #4.

Reflecting deeper on the occasions when ice-creams were eaten, the focus-group members understood that only recently ice-cream is consumed all year round.

"Winter time was no time for ice-creams back then (childhood). Even if we wanted to eat ice-creams we could not find them or if we did they were leftovers from summer." S. - focus group #2.

"I remember a time when I went to Serra da Estrela (the highest peak in continental Portugal) with my cousins on winter time and we asked for ice-creams at the coffee-shop (pauses and laughs). It seemed like we have just asked for an impossible thing. "What a bunch of idiots" he might have thought." M. - focus group #1.

"We do have ice-creams more fit for winter time, those with lots of chocolate like Olá's Magnum. Now I can see myself eating ice-creams in front of my fireplace." V. - focus group #3.

Various different participants in all of the focus-group mentioned an increase on ice-cream consumption during autumn and winter because they are now not afraid of eating leftovers from summer campaigns.

“There was not so much variety as today and they (ice-creams) weren’t as easy to find as today especially during winter.” C. - focus group #1.

It is specifically mentioned the importance of the market leader, Olá, on such a change in consuming patterns, by launching a new portfolio with new displays every year during autumn and winter, even presenting novelties for the formerly known low season:

“Now they even release new products on winter. Before we could only see new ice-creams on summer time. Now it’s different. Even the price cards are new after summer, with lesser products.” M. - focus group #2.

The type of ice-cream could be an indicator of the social class, as this reports put it:

“Back then not everybody could afford a Cornetto. It was expensive.” P. - focus group #4.

“I remember back at school when peoples (social) level could be told by the ice-creams. There was a large group of people who bought an inexpensive one and there were few who bought a Cornetto.” M. - focus group #2.

“When I went to the beach with my parents I was allowed to eat one ice-cream a day, only one. But back then it had to do with the economic part... and then when there was a party...” MR. - focus group #2.

Another price related item focused was the difference between price perceptions or price options depending on the distribution channel:

“Usually when we buy (the ice-cream) at a coffee shop the price is tagged; we want to eat it right there and the question is whether we eat it or not. But in the supermarket there is a wider possibility for choice and we spend more time looking for the right product for the right price. It’s different.” J. - focus group #4.

Consumers are aware of the company’s strategies decoding for instance the limited edition tactic to optimize premium and indulgent market trends, as the following focus-group extract portrays:

“The limited editions of Magnum such as 5 senses or 7 sins make us buy more expensive ice-creams just to be part of the new trend, because of the novelty. And we will run to buy it because we know they are limited editions. The new Magnum temptation is much smaller and more expensive but who cares? We just want to try it!” I. - focus group #3.

This symbolic expression is accompanied by references of consumer socialization contexts in the youngest years:

“When we all went to the ice-cream shops it was a real party. It was a real party.” J. - focus group #1.

“A day at the beach wouldn’t be complete without the ice-cream. All the kids sat together eating.” A. - focus group #4.

Nowadays ice-cream can also be an indulgence and socializing is not mandatory:

“I like to buy a Magnum and take it home to the refrigerator. I wait half an hour and then I enjoy every bit. Just seating on my couch and resting.” R. - focus group #2.

Quality issue is also differently viewed according to the Take-home or Impulse channels:

“Ice-creams are all good. They all have good quality. Well, at least Olá’s and Nestlé’s do... of course if we buy out in a supermarket we must be more careful with some unfamiliar brands.” P. - focus group #2.

Some Portuguese cultural dimensions such as the rich gastronomy of conventual sweets (traditionally made by nuns in religious orders) and sweet pastry is recognized as a possible barrier to a definitive implementation of ice-creams as desserts:

“I love ice-cream but arroz doce, leite de creme ou pastéis de nata (Portuguese traditional sweets) are not replaceable.” T. - focus group #3.

“Ice-cream is very good but on special days, like Christmas or Easter or even in a birthday party there can be ice-cream but the other sweets must be there also.” R. - focus group #2.

This dimension is important and continues to underline ice-cream eating seasonality. From the consumer’s point of view Ice-cream has no competition if the result expected is the cooling effect much more appreciated in summer time. However the competitors for the satisfaction of the need/desire tend to level up during less hot days.

The following table summarizes the interpretation of the content analyses by categories results:

	“Yesterday”	“Today”
Impulse or Take-Home	Take-home consumption was nearly inexistent, Impulse channels ruled the market	Although Impulse market is the biggest share Take-home is growing fast

Variety/availability	Less variety and the supply chain was rather poor bringing stocks to critical levels	Much easier to find even “so-called” limited editions. Much more brands and products by brand
Context (seasonality)	Summer time was virtually the only time of the year to eat ice-creams	Consumers are slowly but steadily eating more ice-cream all year round
Socialization Context	Socialization contexts were of the utmost importance; eating ice-cream was a party not intended for just one	Ice-cream indulgent buys are becoming more than a market niche
Quality	Ice-creams were good but not as elaborated as today’s; there were conservation problems	Today’s ice-cream are generally good; the Impulse market has very good quality brands but in supermarkets we need to be more careful
Price	The type of ice-cream could be a social tag; not everybody could afford a Cornetto	Today’s socio-economic situation as improved and the ice-cream lost its social labelling capacity; prices on the Impulse channels are not as questioned as they are in supermarkets

Table 2. Summary of the interpretation of content analysis results of the focus-groups by coding categories

## Conclusions

Focus-groups analysed Olá brand before and after the last rebranding (radical logo and symbol changes); the previous brand suggested explicit seasonal elements, like a beach tent whereas the new brand suggests not time framed emotions. This important perception is connected to the brand’s efforts on taking some of its products, like Magnum, to other food market areas like warm chocolate beverages or chocolate bars; this strategy operates, as proven by the focus-groups as catalysts of the brand recognition. In addition, Olá’s street selling kiosks have recently been rebranded and will be now called Hot&Go; this Anglicism reflects the effort to transform this channel into an all season selling point complementing ice-cream selling with Knorr soups and Lipton teas.

Focus-groups results tell us that variety and novelty are two features very much appreciated. Nowadays consumers do not question ice-cream availability as they used to and that problem is no longer a central worry. Price is a factor more related to the Take-home distribution channels than the Impulse channels (HORECA or similar); in the same way, the quality of the ice-creams is more questioned on the Take-home channels because there are more brands, including those of the new distribution chains (big food & drugs retailers). The context in which the ice-cream is eaten (including weather conditions and in or outdoors) is still important; however, consumers are changing their perceptions of the

right moment and place and starting to have different products for different situations. Portuguese gastronomical richness particularly on desserts can pose an obstacle to a wider dissemination of ice-cream consumption on some traditional holidays or fests; nevertheless, the indulgence market is growing and the ready to eat products can be handier when a speedy grooming ritual has to be performed. A pure positivist economical point of view would believe that consumers are rational beings. However, we cannot fail to understand that food-purchasing decisions are as emotional as they are logical. For a low-income individual, eating a premium or super-premium product like an ice-cream can represent a special event that carries that consumer to enjoy the same experience as others who have higher incomes. Accordingly, the push for the Impulse market's premiumization is being naturally accepted.

The rebranding of Olá operated changes in the attributes perceived by the consumers transforming it into an all season brand and far more emotional and modern. Olá is not alone in the Portuguese market. Nevertheless, in recent years it has had the opportunity to lead with the biggest market share. The veracity of these numbers holds a much deeper reality. By drawing the markets opportunities, judging by the consumer's reports, Olá has evolved by changing market standards and thus by changing the way people see the ice-cream. This industry shaping role is now known to consumers, regardless of particular product preferences. Political and socio-economic changes in the last three decades brought the necessary conditions but the opportunity for "rebranding" the Ice-cream seems to be on track and right on schedule. Consuming patterns are changing and Olá is expected to continue to have a say on the next consumers talks.

### Limitations and Future Research

This study was exploratory with a limited sample derived from a single country. Further quantitative testing of the proposed model is needed to determine its degree of fit to the general Portuguese population. More research is also required to explore the extent of applicability of the model to other product categories in order to expand its theoretical and practical usefulness. The content analysis and focus-group coding was validated by two different investigators and the measure of reliability used was the raw percent agreement; it is known that this measure can be misleading because simple agreement statistics can be heavily influenced by the number of coding categories used (Lawson et al, 2007); further investigation should include other inter-coder reliability measures such as Perreault and Leigh's *Ir* and Krippendorff's  $\alpha$  highly adequate for marketing and opinion research (Leiva et al, 2006).

### Managerial implications

These findings help to reinforce the importance of marketing principles on changing the consumer behaviour. On the Portuguese market the leading enterprises make more efforts in research and development for products and brand marketing to obtain more profits. This efforts can drive the overall market standard into upper levels of consumption in volume and value. Ice-cream seasonality can be diminished with the correct use of strategic analysis and operational tools. In the common Portuguese ice-cream consumer mind of the seventies, the eighties and even the nineties of the past century there was a logical sense on buying ice-creams mainly on summer time; however that principle is being slowly but firmly put aside. It is true that these preliminary study findings point out that many consumers still prefer summertime for ice-cream consumption; nevertheless the market is transforming itself with a great help from its most important players. The discussion between market driven and market driving firms has been well studied (Kumar et al, 2000). Let alone, would the market evolve the way it does now? Market driving firms can operate a leap in customer value involving not only technological breakthroughs but also marketing breakthroughs (Kumar et al, 2000, p. 130). Conservative market strategies, supported on traditional market studies, would consider the seasonality as an invincible barrier for ice-cream consumption in Portugal. Olá's strategy incorporated characteristics of the market driving orientation such as: i) revolutionary marketing (how to change the rules of the game?), ii) forward sensing (how can the market evolve?), iii) seeing the market differently and iv) reconfiguring channels. The importance of a leading brand on defining the demand is a very interesting and wide scope for investigation. In this article it is stated that the focus groups perceived the importance of Olá's role in changing the way the Portuguese market eats ice-creams. That is why along with Olá's rebranding we can say Ice-cream itself is been rebranded.



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