

Challenges for Increasing Milk and Yogurt Consumption in Brazil

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2. Effective Food Chain and Management

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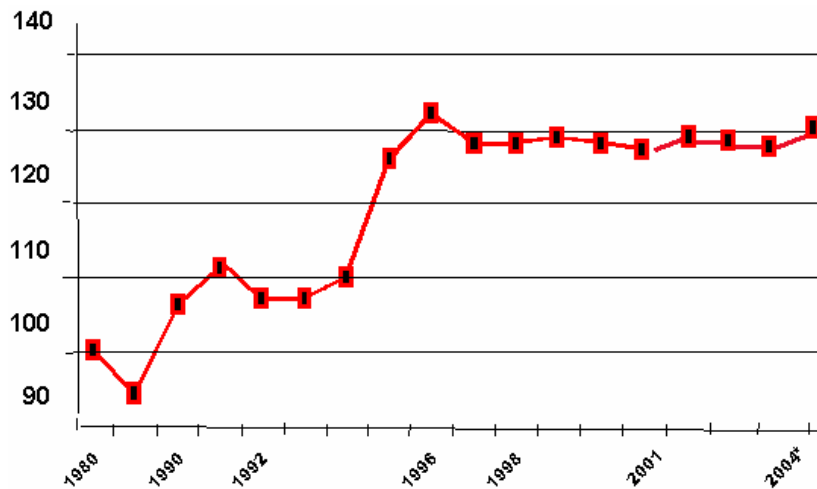
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1. Introduction

The world dairy market is growing. In 2004, the world consumption increased 4% related to 2003 and, in Latin America, this number reached 10%, which correspond to a total of 1.1 billion euros for the category. This shows the importance of the region as an opportunity area for growth.

Brazil has followed this growth trend, which can be observed by the strength of the market share of milk compared with other beverages. Milk is shown as the second most consumed beverage with 25%, showed in figure 2.

Figure 1 – Milk per capita consumption in Brazil – Lt/hab

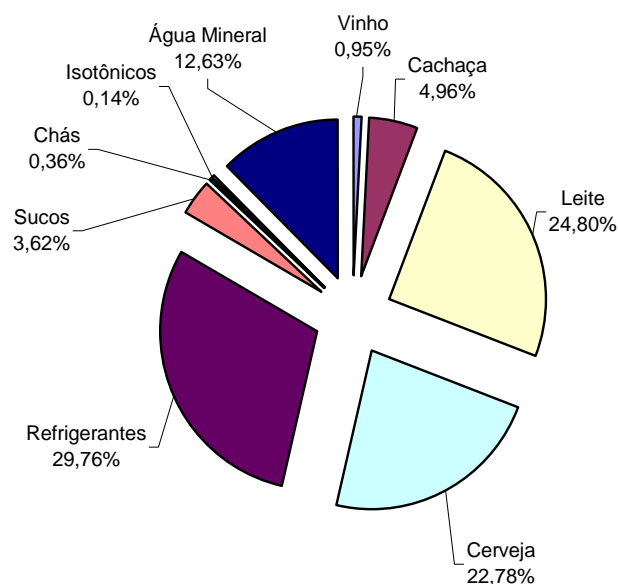


Source: Supplied by an international dairy company

In Brazil, milk is an important nutritious source and drinking milk is a cultural habit. 90% of households consume milk during breakfast (Latin Panel, 2004). The Brazilian milk market sold over 6 billion liters in 2003 and grew 8% between 1998 and 2003 (Latin Panel, 2004). The country represents 66% of the total volume of milk produced in Mercosur (Brazil, Paraguay, Argentina and Uruguay).

Figure 2 allows visualizing the market share of some beverages, in which carbonated beverages are shown in the first position with a share of almost 30%, followed by milk, beer, water, *cachaça* (typical Brazilian spirit), juices, wine, tea and isotonic.

Figure 2 – Beverage Share in Brazil in 2005

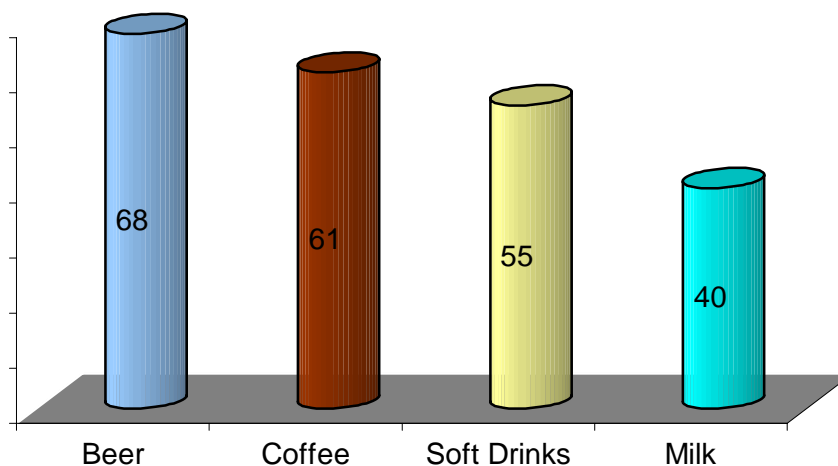


Source: Scot Consultoria (2005)

As showed in the Figure 1, the evolution of dairy products per capita consumption happened mainly in the nineties. However, since them, per capita consumption has not increased at the desired speed by the dairy sector. The Brazilian per capita consumption could, or better should, increase even more, since it is very far from the Healthy World Organization recommendation of 175 litter per person per year. The Brazilian per capita consumption is of 130 litters per person per year. Neighbor countries like Argentina and Uruguay show respectively 220 and 215 litters per person per year. This also suggests a preponderance of factors as cultural eating habits, other than simply population income levels. An interesting commentary from an industrial leader exposes this contradiction: “Brazil drinks beer as a rich country and milk as a very poor country”, showing that milk (in this case the beverage) is subject to a difficult positioning among Brazilian habits.

Talking just about fluid milk, as can be seen on the figure below, on average, the Brazilian consumer drinks 40 litters of milk per year, 68 litters of beer and other 55 litters of carbonated beverage.

Figure 3: Beverage per capita consumption in Brazil (2004) – Lts



Source: Tetra Pak Marketing Service apud Guia Exame 2005 – Agronegócio * Only fluid milk

According to a research done in 2005 by Latin Panel Institute, carbonated beverages are present in 98% of households. The institute followed, weekly, the shoppings of 6,3 thousand families. Milk was present in 99,4% of the residences.

Going deeper into this study, the State of São Paulo shows the highest consumption rate of dairies in the country. In 2004 the estimated total consumption was 7,610 billion liters (32% of total national production). The population of São Paulo consumed 45% of the long life pack milk (almost 2 billion liters), 32% of the yogurt (more than 170.000 tons) and 32,5% of the cheese (260.000 tons) (FORTES, 2005). The milk represents for the State 11% of the total food cost. A heavy user spends about R\$ 140,00 (around 70 dollars) on milk and consumes five times more than a light user in Brazil (SCOT CONSULTORIA, 2005).

Comparing the consumption values in 2004 in São Paulo State, milk consumption was 188 liters per person per year (130 liters/person/year the Brazilian average), cheese was of 6,4 kg (Brazilian average of 2,5 kg/person/year the). The state overpasses the average rates of the country and even the recommended by HWO. This shows the high differences inside Brazil, culturally and economically speaking.

As some of the characteristics of the Brazilian dairy market were briefly showed, and it is clear that dairies do have the potential for growth (low per capita consumption and low income) now it is interesting to go deeper and discuss the milk consumption from a Brazilian consumer perspective, revealing aspect such as habits, needs and, preferences.

2. Problem Statement and Objectives

This paper has as objective to analyze the Brazilian milk and yogurt consumer behavior, intending to understand his preferences, needs and habits as well as to identify the most significant variables involved in the consumer buying decision process.

The research actually was developed to support the milk chain to design vertical actions to improve milk consumption in Brazil. Recently, a vertical chain alliance, called “Leite Brasil” was formed to jointly develop actions for the benefit of the whole milk chain. One of the most important actions to be implemented is to increase dairy products consumption through marketing actions (communication, product management, distribution and pricing).

This research focused on fluid milk and yogurt as being very representative final products of the milk chain.

How to improve milk and dairy products consumption in Brazil? Which would be interesting marketing actions considering the perspective of the final consumer? These are the general questions of the research.

More specifically the paper also wants to understand the impacts of some variables on the milk and yogurt consumption. These are level of knowledge about dairy attributes and effects on healthy, life style, age, gender, income and other variables included in the profile section of the designed questionnaire, discussed in the next section.

These are some of the managerial concern that motivated this paper. Hence, the research problem focuses the information that has to be gathered to understand the opportunities for increasing milk and yogurt consumption.

3. Procedures

Intending to generate more information on the dairy market, a survey was developed on milk and yogurt consumer preferences. A quantitative and descriptive research was done with 335 consumers. A non-probabilistic sampling procedure was used with quotas considering age and income variables. 300 questionnaires were used for processing the data and interpreting results.

Interviews were done using a questionnaire containing 14 question, being nominal and likert scales, with also with some questions with ordinal scales to measure preferences. The questions approached the interviewed profile (age, sex, marriage state, income, life style and education), consumption frequency, consumer’s level of information on dairies, consumption occasion, dairies advantages and disadvantages for the consumer, milk and yogurt attributes as package, kind, and others (see a translated version of the questionnaire in the attachment).

The sample had people from 18 to 29 years old (40%), 30 to 59 (53%) and older than 60 (7%). People from social class A and B were responsible for 50% of the answers, class C for 25%, and classes D-E for 25%.

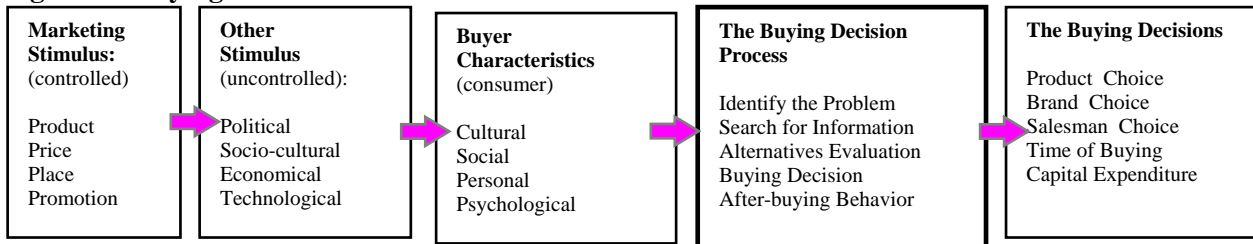
Likert and nominal scales were used to get the consumer attitudes and beliefs on milk and yogurt. Every step of the buying process was investigated as identifying needs, information gathering, alternatives evaluation and purchase decision.

The theoretical background for developing this research was the one of consumer behavior model and the buying decision process by Engel et. Al (1995), Shiffman and Kanuk (1997) and Kotler (2000).

4. Consumer Behavior

Mainly to be more capable to predict, with higher chance of being correct, the consumer behavior and to discover cause-and-effect relationships to product's purchase and, also, to comprehend how the education process of this consumer is during his relationship with the company. It starts with the Buying Behavior Model analysis. What will influence the consumers' buying decision process are the marketing stimulus introduced by the companies through product characteristics, price, place and promotion strategies, plus the external environment stimulus that are the economical, political, social and cultural aspects and, yet the consumer characteristics that are the cultural, social, personal and psychological factors. (Figure 4)

Figure 4: Buying Behavior Model



Source: adapted from Engel et al. (1995).

The *Consumer's Buying Decision Process* that composes the Model showed above can be analyzed in a more detailed level. At the same time that the details of the stages are commented, there is an attempt to bring some tools that may be used for the food companies and also questions that they should make to the consumers, in a structured market research or even in the companies' day-to-day activities, to identify their preferences and deliver the best possible offer. The model can be seen in the Figure 5.

Figure 5: The Consumers' Buying Decision Process

Stage of the Process	How does it happen?	How can companies use it?	Which questions can be formulated to the consumers?
Buying Needs Identification	Personal values and needs associated to the external influences, (mainly originated from social interaction) make the current situation different of the desired situation, thus a <i>need</i> appears.	<ul style="list-style-type: none"> Apply the most frequent and efficient stimulus to stimulate this need as, for example, advertising showing benefits of healthy products, or simply tasty products. The package must communicate these values, acting as a “mini out-door”. 	<ul style="list-style-type: none"> What need is satisfied by consuming this product? Are these needs evident? In what extent are the target-consumers involved with the product? (Engel et al. 1995)
Information Search	The search is done through internal sources (memory, knowledge) and external sources (market and personal relations)	<ul style="list-style-type: none"> Identify how much the consumer searches for information and on which sources mostly. This helps the company to better design the price, distribution and mainly the communication plan strategies. The company must work on the sources that mostly influence consumers. 	<ul style="list-style-type: none"> What product or brand does the consumer have in mind? Is the consumer motivated to search on external sources? Which are those sources? Which are the most searched attributes?
Alternatives Evaluation	The consumer will choose the alternative which is the strongest on the criteria that he or she most value.	<ul style="list-style-type: none"> The company must identify, through research, which product's attributes the consumer most value, and it has to be strongly competitive in these attributes. Repositioning attributes, repositioning competitors, changing also the analysis of the attributes (importance of each). 	<ul style="list-style-type: none"> Does the consumer evaluate and compare the alternatives? Which are the alternatives and the choice's criteria? Can they be changed? What is the result of the alternatives' evaluation? Are the alternatives really different? Can the consumer prove that?
Buying Decision	Decisions are done related to the purchase itself, where to buy, when to buy, and what to buy and, finally, how to pay.	<ul style="list-style-type: none"> Hard work must be done at the sales place (2/3 of the buying decision for food and beverage is done at point of sale) Pay attention to the growth of purchases via alternative channels, like mail, email, webs, telephone and catalogues. 	<ul style="list-style-type: none"> Will the consumer spend time and energy till he or she finds the best alternative? Where does the consumer prefer to buy the product (channel) and at what moment of his or her day?
After-buying behavior	Comparison between the expectations and the performance of the product. The consequences go from extreme satisfaction and positive word-of-mouth to legal attitudes against the company.	<ul style="list-style-type: none"> Keep a 0800 line or an email working adequately and efficiently. Make researches to monitor the consumer satisfaction. Remind that only 5% of the unsatisfied consumers complain. The others simply will never buy again. 	<ul style="list-style-type: none"> Is the consumer satisfied with the product or service? What are the reasons of this satisfaction/dissatisfaction? Does he comment that with other people? Is there any intention of repeating the purchase? Why is that?

Source: Author (Stages of the Buying Decision Process are from Kotler, 2000 and some questions from Engel et al. 1995)

This theoretical framework was used to formulate and analyze the research done with regard to milk and yogurt consumption. The results are showed in the next topic.

5. Results

Discussing briefly the profile of the respondents, 52,3 % was composed of men and 47,7% of women. Considering age, most of the interviewed was between 18 and 29 years old. It was also asked the level of instruction and more than half (54,2%) declared they had finished the

secondary school. On family income, most part (39%) has between 5 and 21 minimum salary (R\$300,00), what correspond in family wealthy something of R\$ 1.500 and R\$ 6300 in total income (from US\$ 750 to US\$3.150). Singles represented 50,7% of the sample and married 40,6%.

The research also considered the people life style and almost 70% of the respondents considered themselves as healthy, while 56% do not make any physical exercise and a great number of 55% belief they were above their ideal weight. Profile and life style data was gathered to try to relate them to milk and yogurt consumption habits and product perception.

The questionnaire asked about the level of information people had on milk, its attributes, its effects on health properties and so on. Most people belief they were little informed on milk and this fact shows opportunities for the industry to show the benefits of milk consumption and to “educate” the consumer. Almost 90% of the sample considered themselves reasonably or no informed regarding these topics and 37% were definitely no informed about these.

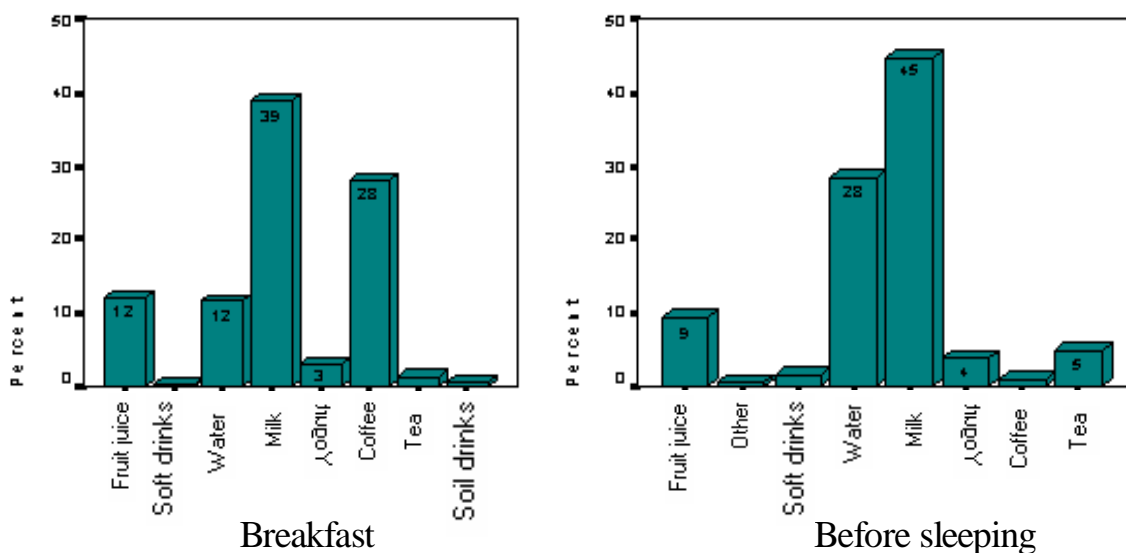
After given a view of the sample profile so far, the article shows the results regarding the preferences in milk and yogurt consumption. First the results related to milk will be presented followed by yogurt.

Results related to Milk Consumption

Related to why people drink milk, the answers showed this is related to healthy (60% of the sample) and the fact that this is a very important diet component (around 70%).

Talking on consumption occasion, the research tried to identify the most preferred beverage in six different occasions and see how milk was positioned. Milk was in 39% of the answers considered the breakfast beverage, followed by coffee and fruit juices. Interestingly before sleeping is also the occasion when milk is far the most preferred beverage (45%). However, during lunch and dinner the most preferred are the fruit juice and the carbonated beverage. Fruit juice is the most preferred during the afternoon break (a quick meal between lunch and dinner, typical in Brazil) and milk is the second most preferred with 16% of total choices. It is interesting because in Brazilian tradition culture it can be seen that milk is the drink for before and after sleeping, related to rest and to have a start of the day.

Figure 6: Consumption Occasion



Source: Elaborated by the authors.

Some of the results show once the consumer start the habit of drinking milk, the consumer drinks daily, being breakfast and “just before going to bed” the moments of highest preference for the consumption

Discussing advantages and disadvantages of milk as a drink option for the consumer, trough the research it could be seen a general perception as a healthy drink. 92% of the sample agreed with this information. There is also a positive perception regarding milk as satiating hunger (56%) and being tasteful (70%). Another milk characteristic according to the sample is the fact that it makes you fat (30%). The greatest disadvantage of milk is related to its taste (21% of the sample), what does not mean it tastes bad, but is an important comparative disadvantage.

Related to the most considered attributes at the time of choosing which milk to buy, those attributes were, from the most important to the least important: the type (A, B, C or Long Life Milk), skimmed or half skimmed, brand, price, package and finally functional properties. It is important to say that table 1 shows percentages related to the quantity of people who choose the attribute as most important.

Related to branding, a very curious fact is that the consumers do value the milk brand, contradicting a general perception of the market that the competition is solely based on price, actually 50% of the sample finds the brand an important factor for milk as it could be seen.

Table 1– Attributes in milk choice

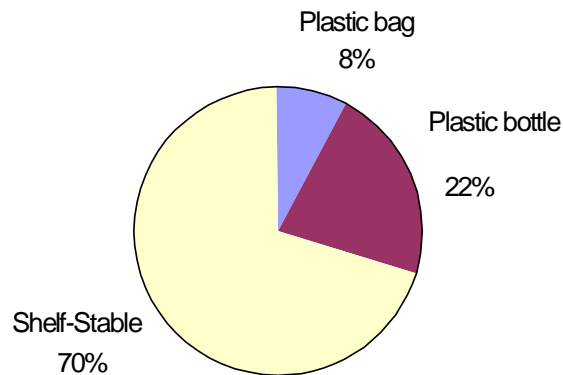
Nº	Attribute	% (1 st option)
1	Type (A, B, C or Shelf-Stable)	35
2	Skimmed, Semi-Skimmed,	29

	Standard	
3	Brand	13
4	Price	12
5	Packing	7
6	Functional Properties	6

Source: Elaborated by the authors (2005)

To go deeper into the package option, among the options plastic bottle, plastic bag and long life, the most preferred one is by far the long life package, with 70% of the preferences. The least preferred one is the plastic bag with just 8%.

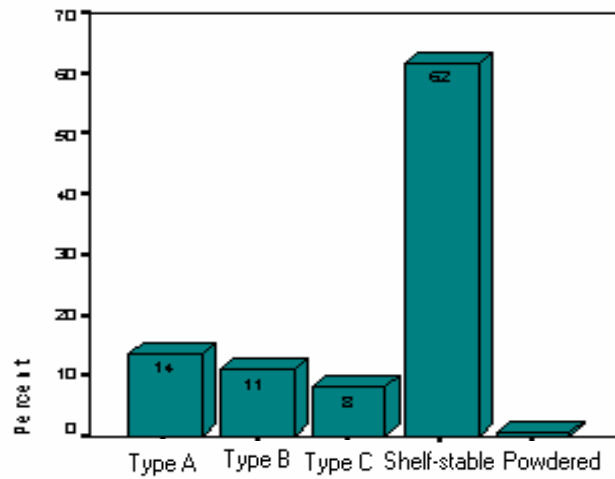
Figure 7: Packaging preferences



Source: Elaborated by the authors

The more appreciated milk by the consumers, as the package, is the long life, with more than half of the answers (62%), due to its convenience. Followed, the most preferred were type A (for being more tasteful), B (for being cheap) and C for being cheap and convenient (the convenience of C is probably related to other uses of milk as restaurants or as an ingredient in general). As can be seen the Long life Package is far the most preferred alternative considering its convenience (less perishable) and more recently the price, because it is often the cheapest alternative.

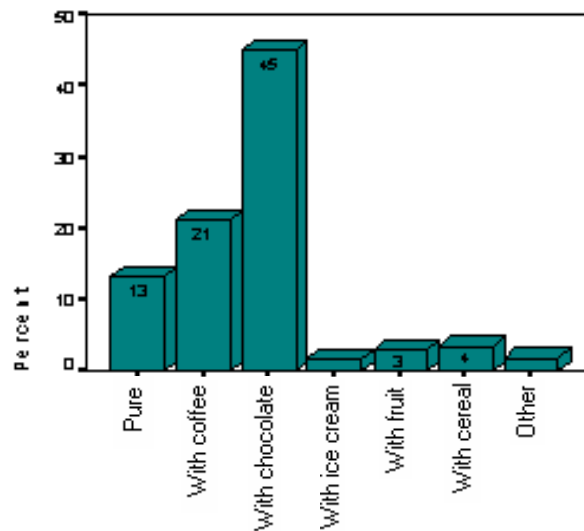
Figura 8: Types of Milk



Source: Elaborated by the authors

In Brazil, as in other countries, many people drink milk mixed with something else. Chocolate powder was chosen by 45% of the consumers, followed by coffee and then pure milk (nothing mixed). Last positions were ice cream and fruits.

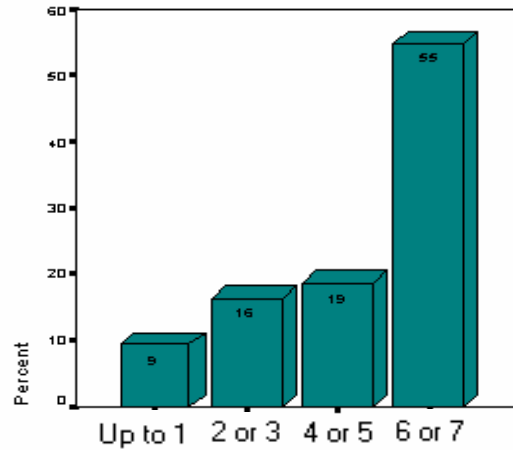
Figure 9: Way of Consumption



Source: Elaborated by the authors.

The consumption frequency is daily for 55% of the sample and until one per week for just 9% of the sample (Figure 10).

Figure 10: Consumption Frequency



Source: Elaborated by the authors

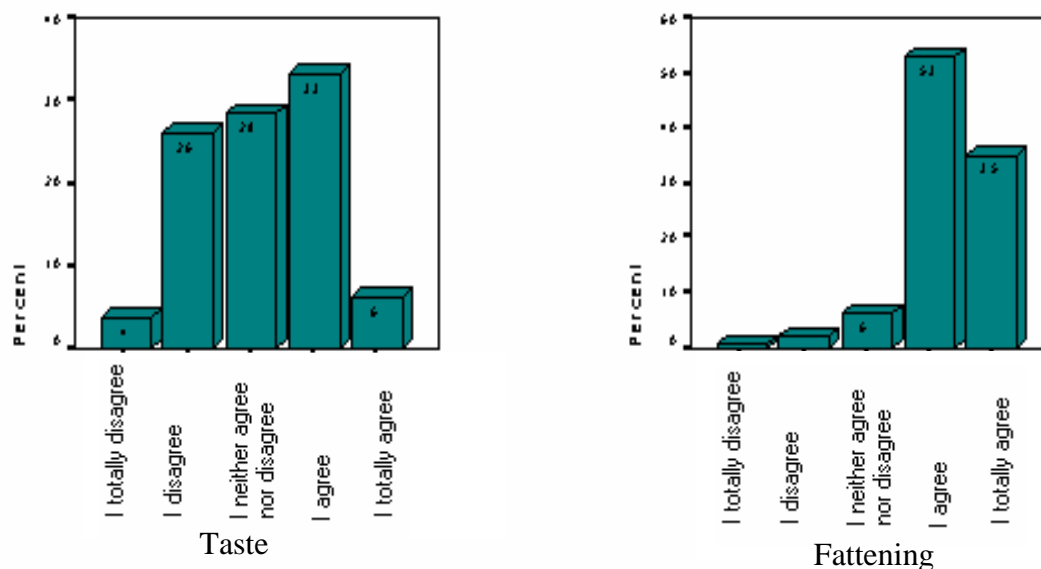
As shown the results obtained related just with milk, the paper will show the results related to yogurt consumer behavior.

Results related to Yogurt Consumption

Yogurt, as well as milk, is consumed mainly in morning meals, breaks during afternoon and before sleeping. Nevertheless, in these occasions, it shows up as the fifth among other 7 options.

Even not being in the first place in consumer preference, the general perception related to yogurt is very positive. The research showed advantages of yogurt as being healthy, satiate hunger, and being tasteful. The only notable disadvantage of yogurt is “it makes you fat” (70% of the sample agreed with this sentence). The far most positive attribute is taste (see Figure 11).

Figure 11: Yogurt product Attributes and Consumer Perception



Source: Elaborated by the authors

Very different from the responses related to milk, which few people valued functional properties, in the case of yogurt this attribute is strongly considered in the second place, just after taste. Table 2 shows the total sequence and the sample opinion. The percentage of people that do not find brand important for yogurt is around 60%. It shows that there is also a relevant non-differentiation perception related to yogurt.

The table below was built in a way that the lowest the number the highest the attribute importance, once people were asked to rank the importance of these attributes. Taste is a very important variable, or product attribute. Taste actually is the most important attribute for yogurt buying decision and is the most unfavorable variable that explains most people avoid drinking milk.

Table 2 – Yogurt Attributes Importance

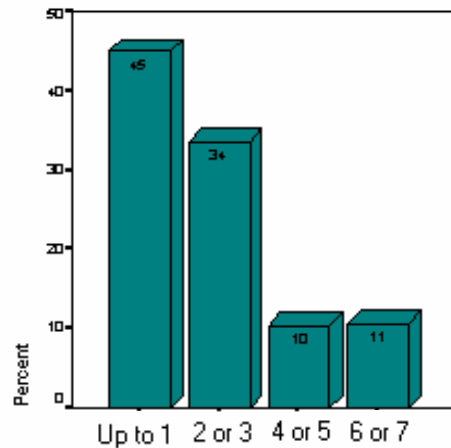
Nº	Atributte	Degree	%*
1	Flavor	2,12	45%
2	Functional Properties	3,36	21%
3	Consistency (liquid, creamy)	3,47	9%
4	Price	3,51	15%
5	Brand	3,81	10%
6	Packing	4,63	3%

* Percentage of 1st choice.

Source: Elaborated by the authors.

In a scale of 4 alternatives related to weekly consumption frequency, being 1, 2 or 3, 4 or 5, 6 or 7, most of the sample (45%) drink yogurt just once a week, and daily just 11% do.

Figure 12: Frequency of Yogurt Consumption



As seen these general results other interesting points as well as the conclusions will be discussed in the next topic.

Effect of Information, Age and Life Style on Consumer Attitude and Habits

An specific analysis tried to see the impact of information, age and life stile on consumer attitudes and habits. An ANOVA analysis showed significance at 5% of some variables, as will be discussed next:

The knowledge on proprieties, features and effects of milk and derivatives does result in a different consumption behavior. People who consider themselves well informed consume more yogurt and believe that it is good for their health. With regard to milk there is a general understanding that it is healthy but this feature must be better elucidated as few people consider themselves well informed.

The variables resulting in the lack of information and of consumption of milk and derivatives are, in a first moment, good opportunities to improve the consumption of fluid milk (BEGOSSO 2004). Moreover, the milk image is very tied to children, thus it is interesting to stimulate the consumption in other age ranges.

The folklore, due to Brazilian consumers, about adults not being eligible to drink too much milk as they are not able to absorb all the substances in this aliment (THOMAZINI, 2004), contributes to the low consumption of fluid milk.

In addition to stimulate the consumption of milk and derivatives in all the phases of life, to have an argument about dairies being good to health and about the differences on their quality can influence the brand differentiation. The companies which are interested in differentiate their

offers must understand the product's properties and use this to incite the consumer to choose for their brands. The reason for this is that consumers who are concerned with their health consider the product's trademark when shopping as a more important attribute when compared with other consumers who do not have such information.

People who think are above ideal weight do think milk and yogurt make you fat, what is bad considering the "light wave" nowadays. Another final point is that people that regularly have some sports practicing prefer plastic bottles as best package option than Long Life.

6. Conclusions

Many are the reasons for the low milk per capita consumption, which were discussed in this article, as the lack of information about dairies, the habit of milk consumption only in childhood, at breakfast and before sleeping, the income (which reflects in milk consumption) and the existence of competing drinks.

Increasing per capita consumption has to do in converting not drinkers into drinkers, explore different consumption occasions and find opportunities for mixing with other products. Change perceptions and stimulate different consumer behavior is a challenge for the whole milk chain, when coordinated, to set up a marketing program and implement some of the actions based on the information suggested in this paper.

In a moment that the concern about health and life quality is increasing as well as the consumption of juices, which is the first choice at lunch, afternoon snack and dinner, and second choice in breakfast, it is important that milk and yogurt are also associated to that kind of values.

The release of drinks prepared with milk or yogurt mixed with fruit juice or other kinds of flavors, can be an option to associate the products to healthy life. Also, the fact that the products are associated to light meals could contribute as well. Another fact noticed is related to the product's packing, plastic packages for milk are usually used for consumers that practice sports and consider having a healthy life. Therefore, plastic packages in some way show up as a suitable alternative to that style of life.

It was evidenced by the research that who drinks milk, drinks frequently and every day, therefore, exists a challenge to increase the market share of milk drinkers: to convert not drinkers to drinkers. It was found that the greatest barriers are the taste, compared to other drinks, and the insight that to drink milk makes one to become fat. The latter finding can be clarified with campaigns about milk properties.

Regarding the finding that regularity of who drinks yogurt is very inferior of consumption of milk, the paper suggest that there is room for increasing yogurt consumption; this can be made expanding the consumption occasions, what can also be extended to milk. Surely the consumption increasing is obtained stimulating it during the day and not only in the dawn or before sleeping and, moreover, as previously said, extending it to all the age ranges.

At lunch time yogurts and cheeses can make part of the menu, at afternoon snack the consumption of milk and yogurt can be increased since the products are related to restfulness and

relax and satiate hunger. These two attributes are also applied to dinner. Moreover milky products can be served at dessert time. The focus of communication should have clear these aspects of division by occasion of consumption.

A combination of several factors can increase the consumption of milky products in Brazil. In addition to the identification of new applications for milk and dairies in general, the development of new products and more attractive packages.

Milk has a positive image, but this image has not been strengthened or communicated adequately. Institutional marketing can be an adequate tool to restore this advantage and create more favorable conditions for the companies in the chain..

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8. Attachment

Milk and Yogurt Consumer Behavior

1. Answer the questions below, considering your perception about milk:

Milk	1 I totally disagree	2 I disagree	3 I neither agree,nor disagree	4 I agree	5 I totally agree
To drink milk is healthful	()	()	()	()	()
To drink milk eliminates hunger	()	()	()	()	()
To drink milk is flavorful	()	()	()	()	()
To drink milk is fattening	()	()	()	()	()
To drink milk is important only in childhood	()	()	()	()	()

2. Answer the questions below, considering your perception about yogurt:

Yogurt	1 I totally disagree	2 I disagree	3 I neither agree,nor disagree	4 I agree	5 I totally agree
To drink yogurt is healthful	()	()	()	()	()
To drink yogurt eliminates hunger	()	()	()	()	()
To drink yogurt is flavorful	()	()	()	()	()
To drink yogurt is fattening	()	()	()	()	()
To drink yogurt is important only in childhood	()	()	()	()	()

3. About nutritional properties, health effects and dairy/milk types you are:

Very well informed Informed A little informed A layperson

8. What is the best milk packing in your opinion?

- Plastic bag Plastic bottle Shelf-stable

9. Who consumes more milk in your home?

- Child Teenager Adult Aged
 All

10. Which kind of milk do you prefer?

- Type A Type B Type C Shelf-stable Powdered

11. Why do you prefer it?

- Because it is tasty Because it is healthy Because it is convenient
Because it is cheap

12. How many times in a week you drink milk?

- None 1 2 3 4 5 6 Everyday

13. How many times in a week you drink yogurt?

- None 1 2 3 4 5 6 Everyday

14. Is the milk brand important for you?

- No Yes. Which one? _____
one? _____

15. Is the yogurt brand important for you?

- No Yes. Which one? _____

Profile

Age: Up to 13 13 - 17 18 - 29 30 - 59 60 years old or more **Gender:**

Male Female

Civil status: Married Single Other _____

Family income: Up to R\$300 R\$300–R\$1.000 R\$1.001–R\$1.800 R\$1.801–R\$7.500 R\$7.500 or more

Education: Elementary school Secondary school High school College

Life style:

Do you think you are a sportsman? Yes No

Do you think you have a healthful life? Yes No

Do you think you are above your best weight? Yes No