

**The Evaluation of Milk Brands both
in the Consumers' Minds and the
Market in China**

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Abstract

The economist has predicted that the consumption of goods and services in China has been steadily increasing every year (Paul Hubbard, Hurley, & Sharma, 2012) and therefore China has become an attractive market for both local and international businesses. Brands are playing an important part in the lives of Chinese consumers. The current study aims at bringing together the concept of brand salience and double jeopardy to understand the brand choices of consumers in China, specifically the choices and evaluations with respect to milk brands.

This research will mainly focus on brand salience and double jeopardy, in the background of consumer based brand equity. Brand salience and double jeopardy are really useful methods of analysing consumer market, especially by using them together. However, they have not drawn proper attention in the past few years. In short, the theory of brand salience helps us to explain which element of the brand attracts consumers to buy. Double jeopardy shows a not well-known but a true fact, which is a smaller/less popular brand has less-loyalty customers, compared to a bigger/more popular brand. These theories can help us look beyond the surface. By using them properly, both poor performing brands and miscategorised brands can be diagnosed. Therefore, this research area needs more research. The result of the research will benefit both academic and commercial domains.

The research methodology consists of both quantitative and qualitative approaches. This paper chose milk brands in China as the research object. The original reason for choosing this topic is that Chinese dairy safety still gets a lot of public attention in the world, even 6 years has passed after the melamine scandal. 7 individual interviews were done to get a broad view, followed by 270 surveys handed out in dozens of cities in China. The findings of the study revealed the existence of brand salience and double jeopardy in the category of milk in China. Suggestions are made for future research, and the managerial implications are discussed.

Key words: brand salience, milk brands, double jeopardy, NBD-Dirichlet Model

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Chapter One

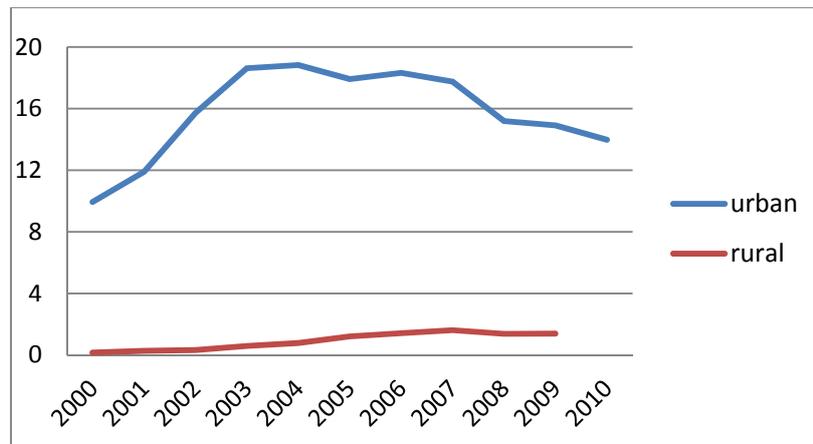
1.0 Introduction

1.1 Background of Milk Industry in China

The focus of this chapter is to introduce the context encompassing the research project in which the data for this project was collected. This chapter will include three sections. Firstly, a brief explanation of the melamine scandal and the change of per-capita consumption of milk before and after the scandal will be discussed. Secondly, the opportunities and threats facing Chinese dairy firms are considered. Finally, detailed facts concerning different milk types, prices, and packages will be considered.

Food safety has become one of the most concerning social issues in China after the milk scandal of 2008, which involved the adulteration of milk with a hazardous component called melamine (Organization, 2009; Pei et al., 2011). The incident of milk adulteration affected around 300,000 babies in China, of these, 294,000 were reported as suffering from urinary problems and around 54,000 babies were hospitalised for other health problems (n.d., 2009; Veil & Yang, 2012). The World Health Organisation (WHO) referred to the melamine milk crisis in China as one of the most serious and critical issues the United Nations (UN) has dealt with in the recent years (n.d., 2009). The Melamine Scandal became a news theme in China's daily newspapers and much of the global news media (see Appendix A). Major dairy companies and their brands were involved in the crisis, such as Mengniu, Yili and Guangming. The 2008 milk scandal continues to suppress consumption in the Chinese market, as shown below.

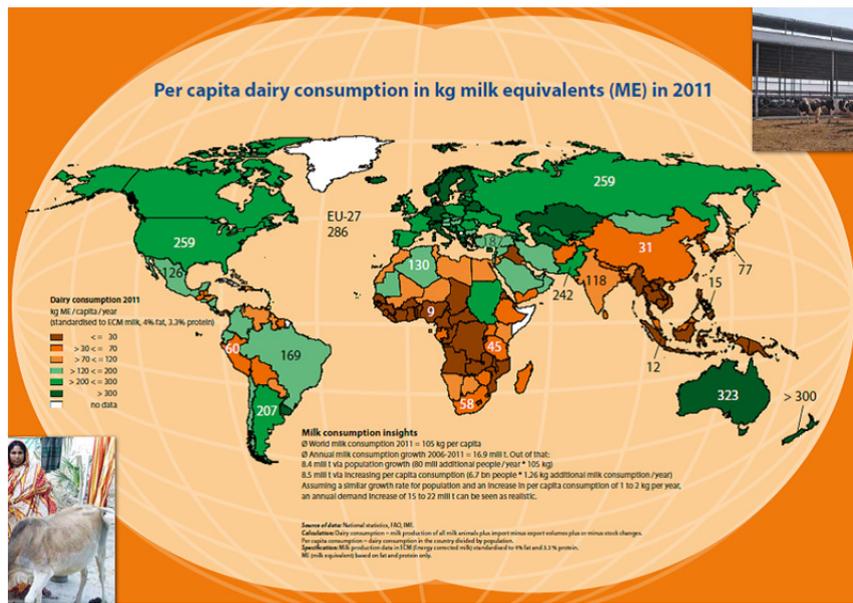
Figure 1.1 The Per Capita Consumption of Fresh Milk in China (kg)



Source: (Zhou, Tian, Wang, Liu, & Cao, 2012)

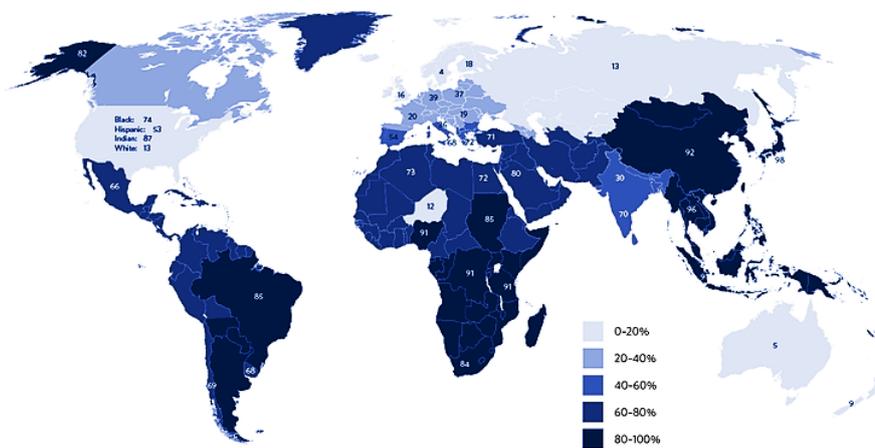
However, there are confounding factors alongside the impact of the milk scandal relating to dairy industry in China over the last decade. Firstly, Figure 1.1 shows the per capita consumption both in the urban and rural areas in China. From the figure we can see that urban consumption is very different from the rural areas. It is because people in the urban areas are much wealthier, and the urban masses possess more knowledge about the nutritional value of milk products (Gale & Huang, 2007). In rural areas, there is not enough importance attached to among people. Rural consumers have limited distribution, product and assortment options. It is reasonable to assume that the rural consumers are less sensitive to the concept of brands and branding due to relatively simple marketing and low prices. In addition the data from 2000 to 2003 shows an increasing trend in the consumption of milk and dairy products. However, consumption decreased notably since 2007. It is believed that the decreasing consumption from 2007 in rural areas is related to consumers' concerns about milk quality, food safety and contamination. Interestingly, the trend of milk consumption before the melamine scandal occurring was either stable or decreasing in both rural and urban areas. It is therefore likely that despite the melamine scandal implications, dairy firms need to change their brand marketing management practices and strategies so as to promote continued market growth.

Figure 1.2 Per capita dairy consumption in kg milk equivalents in 2011



Source: (IFCN, 2013)

Figure 1.3 Map of Milk Consumption & Lactose Intolerance around the World



Source: (Yamamoto, 2012)

In 2011, the International Monetary Fund (IMF) reported the per capita dairy consumption in kilogram (kg) milk equivalents (ME) all over the world (see Figure 1.2). The number can be seen that China only had a per capita dairy consumption of 31 kg, which is far less than most other countries. A probable explanation is that over 90 percent of Chinese are suffering from

some level of lactose mal-absorption, according to the Yamamoto (2012). It is mentioned by Xiu and Klein (2010) as well. However, the Organisation For Economic and Development (2013) expected that the dairy product consumption in China will increase 38 percent by 2022. Most newspaper and websites media hold the same point of view that there is still large potential for growth in the market for dairy products in China (The Wall Street Journal, 2014). The per capita consumption of milk and dairy products indeed has increased from around 22kg to 31kg between 2010 and 2011 (IFCN, 2013). In addition, the annual production of milk increased nearly five times during the period from 2000 to 2008 (Pei et al., 2011). Some consumers converted from fresh milk to other substitutes for milk, such as yogurt, imported milk or milk powder due to the problem of food safety. In summary, how to manage milk products and milk brands for Chinese consumers is a challenge for the majority of Chinese dairy companies.

The dairy market in China, especially for milk, is very different from western markets, e.g. the New Zealand dairy market. It can be summarized into positive and negative aspects, from the local dairy firms' standpoint.

On the positive side, there is a greater need for the consumption of milk in China. Pure milk accounts for a majority of consumption out of all dairy products (Zhou et al., 2012). It is probably driven by changes in the Chinese food consumption patterns, which have shifted closer to the Western style (Pei et al., 2011). Chinese have realized the benefits of milk to daily life and health. The Melamine Scandal is also an opportunity for reforming quality assurance in the dairy industry in China. The Chinese government has introduced a series of laws and regulations about food safety after 2008:

- 2008.10.9 Regulations on Supervision and Administration of Dairy Product Quality and Safety (Dairy Product Regulations)
- 2009.6.1 Food Safety Law of the People's Republic of China
- 2011.11 The State Council gave the Ministries of Health and Agriculture a year to revise safety and quality standards for milk-products and develop a process to ensure that animal feed does not contain melamine or any other dangerous substances
- 2013.5.1 Supervision and Administrative Measures on the Inspection and Quarantine of Dairy Imports and Exports came into force

- 2014.5.1 new Chinese regulation were put into effect that will spell the end for some of the smaller global milk powder exporters to China

On the other hand, what the Chinese dairy firms facing more are threats. Firstly, Chinese consumers have lost trust in the Chinese dairy brands (Qiao, Guo, & Klein, 2010). Except for Sanlu, the company that went bankrupt due to the Melamine Scandal (Veil & Yang, 2012), Yili and Mengniu were also found to contain melamine in some of their products (n.d., 2008). After the scandal, there were news items about milk produced from Yili and Mengniu containing aflatoxin or carcinogens, or altered dates of production (Qin, 2014). The current situation is that, in order to compete with other milk brands, Chinese dairy companies have placed greater focus on advertising, packaging, to the detriment of product quality (Li & Wang, 2011). Yili and Mengniu are the largest two dairy companies in China, but also among the world's top 20 dairy companies (n.d., 2014b). The other major companies include Guangming (Bright), a competitor located in Shanghai, and Sanyuan, a local Beijing dairy firm (Z. Wang, Mao, & Gale, 2008). Products of these companies are nationally distributed. Furthermore, the foreign dairy companies are a threat that cannot be neglected by the domestic brand managers. Nestlé entered into the Chinese market in 1908 (Nestlé, 2014), becoming the most well-known dairy brand in China. Since Chinese dairy products have so many problems with food safety, foreign dairy companies have seized the opportunity by either by entering into the Chinese market or by increasing existing marketing and distribution intensity. With the demand for food safety in China, consumer are more willing to buy imported dairy brands that have a high reputation and unpolluted image (Knight, Gao, Garrett, & Deans, 2008). There are dozens of international milk distributed into the supermarkets and online shops in China. For most Chinese families, with the improvement of living standards, international brands are more affordable as well. Also, news that Chinese consumers go outside of China to buy dairy products can often been seen (E. Wong, 2013).

Therefore, in this complicated situation, how Chinese national brands stand out amongst other brands, and how Chinese consumers choose amongst brands are important questions for Chinese food marketers and brand managers to understand.

This paper will focus on both domestic and foreign milk brands in China. Before entering into the subject, there are few detailed facts about the milk products different from western market. There are mainly six national brands (Yili, Mengniu, Guangming, Sanyuan, Deluxe,

and Jindian) in the entire market, but Deluxe and Jindian are sub-brands under Yili and Mengniu. Local brands in China are countless, which will be regarded as one group. Most milk on the market is whole milk, and only a small portion of people drink low-fat milk or skim milk in China. Pure milk is mainly packaged into four various packages, depending on storage time. The first one is fresh or raw milk, which can only be stored chilled for 24 to 36 hours. The second one, which can be stored for one to two weeks, is called pasteurized milk. The third type is ultra-high temperature (UHT) milk. Its shelf life is from one month to 45 days, and is packaged in soft bag or tetra pillow packs. The last one is also called UHT milk, but with more advanced technology, so it can be stored at room temperature for between 2 months to 12 months. Its package is known as tetra brik (TetraPak, 2014). For more details, please refer to the following picture.

Figure 1.4 Examples of Different Types of Domestic Milk Brands in China



The price of domestic milk ranges from 4 RMB (0.8NZD) to 28 RMB (6NZD) per litre. Compared with 1.6NZD (New Zealand now, 2014) per litre in New Zealand, the average price in China is high for Chinese households. Milk with price over 28NZD per litre is regarded as high-end milk, such as Deluxe and Jindian. This kind of milk is created and

attracted with its high protein, and high-quality source of milk. Milk sold in China also is divided by single package and multiple packages. Multiple packages of milk are used by themselves, and it can also be the gift for the old, the sick or other important people. The price of multiple packages can be as high as 15NZD (5NZD/litre*3 litre). This is a rare situation, different with most other countries. The market of milk is segmented into many parts, so it is another challenge for milk brand managers.

Figure 1.5 Examples of Foreign Milk Brands in China



There are dozens of foreign milk brands available either in the supermarkets or online shops in China. The picture above is only a fraction of the whole market. As they are imported from overseas by overseas purchasing agents, they are all long life milk. The average price of foreign milk is around 5NZD per litre, including transportation expenses. Chinese households, concerned about food safety issues, have an increased potential for purchasing foreign brands rather than domestic, especially in big cities.

Therefore, if it takes few seconds to make decision about which milk brand to buy in New Zealand, it will take much more time, possibly one to two minutes for Chinese consumers on average. Consequently, there are many assessment criteria involved in the Chinese consumer decision process, which deserve to be researched in more depth than might otherwise be considered.

1.2 The Research Problem

The research aims to understand the perceptions of Chinese consumers towards various milk brands. The research aims to find out consumer choices or preferences of milk brands post the Melamine Scandal 2008. The findings of the research would help companies understand the needs of their consumers and design various strategies in order to regain consideration for purchase where brand performance has been poor.

1.3 The Importance of the Problem

Chinese consumers have become very cautious and scared of buying milk products. The sales of various dairy companies have been dropping notably after the melamine milk scandal. The current study therefore has both managerial and academic implications. The results of the study are important for companies to help restore their lost image with consumers. In addition, the findings will enable companies to implement appropriate branding strategies to gain back their lost market share. Lastly, the study also aims at adding to the literature in brand salience and double jeopardy.

1.4 The research question

In order to fulfil the aim of this research the following research question and sub-questions have been developed:

How to evaluate milk brands both in consumers' mind & the market in China?

Sub questions:

- 1 Have people and the dairy company recovered from the Milk Scandal?
- 2 How many different categories about milk in consumers' mind?
- 3 What the foreign dairy companies can learn from this study?

1.5 The Current Study

Managers usually evaluate brand performance from the products' market share, number of loyal customers or profit, while this cannot represent the real performance of a brand. This research will provide a new and effective measurement, comparing brand performance in consumers' mind and in the market, by mainly using two theories called brand salience and double jeopardy. These two theories are lack of more in-depth research, and enough application. In other words, loyalty appears both in mind and behaviour is loyalty. Mix research methods were considered the most appropriate in allowing rich information to be gathered for this project. These participants were all chose using a convenience sample, which will be discussed in detail in Chapter 3.

Chapter Two

2.0 Literature Review

In this chapter, a detailed review and discussion are presented about brand salience and double jeopardy in the background of consumer based brand equity.

2.1 Introduction

Consumers have a decision-making process (Widing, 2003), whether when they are buying milk or purchasing a car. Generally speaking, milk is regarded as a low-involvement product (Nguyen, Nguyen, & Barrett, 2008; Pinya & Mark, 2004), as the purchase decisions can be made in less than one minute (Vieceli & Shaw, 2010). However, in China, consumers need more time to decide which milk brand is appropriate to buy, but New Zealanders do not have to do this. Complaints are easily found about milk brands on the Internet in China, such as Weibo (similar with twitter). Therefore, the process of consumer decision making (Schiffman, 1997), based on cognitive psychology (Keller, 2003b; P. Z. Wang, Menictas, & Louviere, 2007), is essential to be understood for both academic researchers and marketing practitioners.

There are two primary aims of this study: 1. To investigate the usefulness of brand salience and double jeopardy in the context of consumer based brand equity. 2. To ascertain these two theories can be applied to the milk brands in Chinese market. Brand salience is proved to strengthen the potential of the brand being thought and bought (J. Romaniuk & Sharp, 2004; Vieceli & Shaw, 2011). What customers think should lead to what customers purchase at last. In other words, in order to make a brand become a purchased brand, or a brand with high degree of brand loyalty, brand managers should make the brand be salient in consumers' mind. Brand salience is an important brand management tool, but it is likely not used as often as it should be. Another major objective of this study was to investigate the phenomenon of double jeopardy. Double jeopardy is not well known but is often supported by evidence. A less popular brand has less-loyal customers, compared to a more popular brand (A. Ehrenberg & Goodhardt, 2002). Theoretically, there is a similarity in basic assumptions and model form between brand salience and double jeopardy. The key idea in brand salience is the more salient a brand is in consumers' mind, the more loyal customers the brand should have, and the more popular the brand should be.

There were no studies found that investigated the relationship between brand salience and double jeopardy. However, any findings should make an important contribution to the field of brand management.

2.2 Consumer Based Brand Equity

Brand equity is becoming increasingly important in both the marketing academic domains (Steven, Kevin, & Stephen, 2004; P. Z. Wang et al., 2007) and business practice (Walfried, Banwari, & Arun, 1995). A rank of brand value has been released by Interbrand every year since 2000, which has become a popular topic in global business. There are many other companies, like WPP Consulting and the Forbes that issue ranks of brand value as well. Brand equity was used to reflect the “added value” of brands since 1980s in marketing literature (Pappu & Quester, 2006; Vieceli & Shaw, 2011). In addition products with a more well-known brand can generate more money than a less well-known brand (Ailawadi, Lehmann, & Neslin, 2003). For example, Sony, Nikon and Ricoh sold camcorder alike in all respects except for brand name and price, but Sony camcorder’s average price is 10% higher than the Nikon’s. Moreover, Sony outsells the Nikon, and Ricoh enjoys a smaller market share (David A Aaker & Biel, 1993).

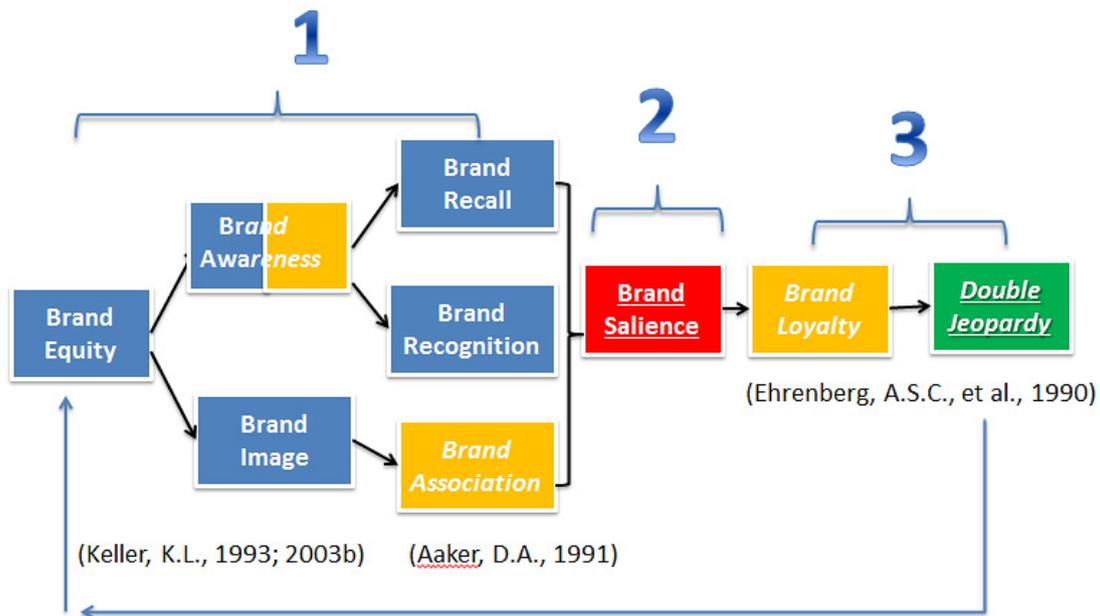
Brand equity is divided into two aspects, which are financial based brand equity and consumer based brand equity (David A. Aaker, 1991; Neal, 2008). The former is more specific, because it is measured by monetary value, which is useful for the purpose of mergers, acquisitions, or stock pricing (Victoria, Nabil, & David Michael, 2010). For instance, when Westpac Bank bought the Trust Bank, Westpac Bank spent NZD (New Zealand Dollars) 1.27 billion (“Westpac,” n.d.). However, put together all its tangible assets, Trust Bank is only worth around NZD80 million. The brand name of “Trust Bank” gained the extra monetary value that Westpac Bank spent. Similarly, Cadbury-Schweppes paid \$220 million for the “Hires” and “Crush” product lines of P&G, where 90% of the total expenditure was attributed to brand assets (Walfried et al., 1995). To sum up, brands with positive financial based brand equity can bring more loyal customers, higher market share, and potential profits (Elliott & Percy, 2007).

From the perspective of customer, brand equity indicates that the loyal users of a brand just 'knows' that brand is better, such as the example of Coca-Cola and Pepsi cola. Although the preference of two brands is random in blind taste tests, Coca-Cola has a higher market share (Elliott & Percy, 2007). If a brand with positive consumer based brand equity, customers are likely to be less sensitive to price rises, and more willing to look for the brand in a new distribution channel (Keller, 2003b). Besides, brand equity has influence on customers' confidence in the purchase decision, and promote customers' satisfaction with the use experience (David A. Aaker, 1991). Consumers' perception of added value brings positive financial consequences (Elliott & Percy, 2007; Walfried et al., 1995), and vice versa. Therefore, a deeper understanding about how consumers feel, think, and act are useful of for marketers providing management guidance (Keller, 2003a).

2.3 Models of Consumer Based Brand Equity

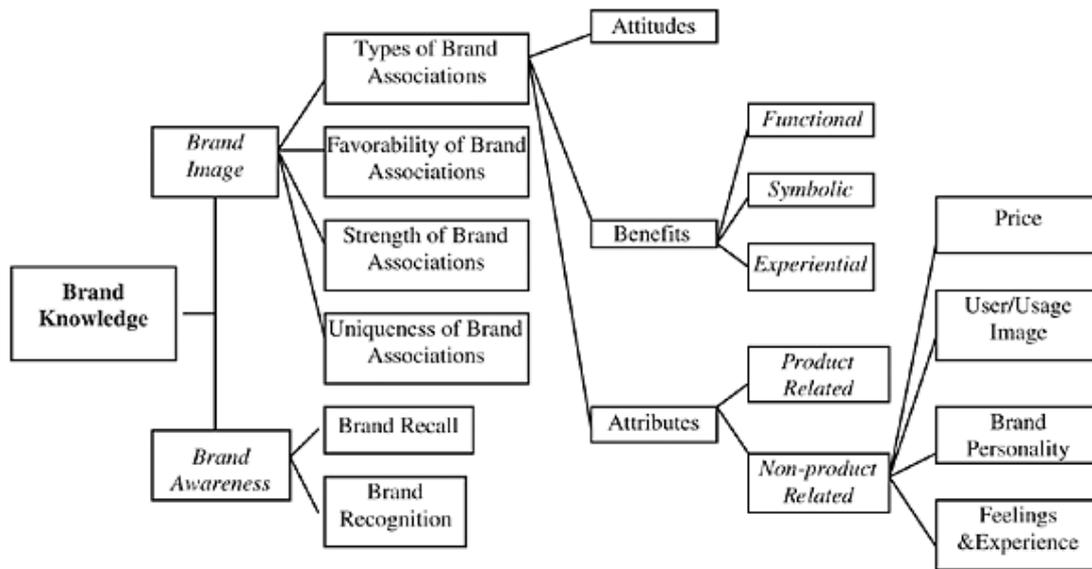
Consumer based brand equity is the background of this research, because it is what will eventually affect the success of a brand (Elliott & Percy, 2007). Academics, like David A. Aaker (1991) , Keller (2003b), and Kapferer (1992), Heding (2009) have proposed different models of consumer based brand equity, while they all hold different opinions about the compositions of the model. Research about consumer based brand equity is a complicated topic, as it needs to understand consumers' decision making process. Moreover, Elliott and Percy (2007) reported that there are at least 26 different ways measuring brand equity. The measurement varies according to different customers, different category of products, and different places. Therefore, this dissertation establishes a conceptual theoretical framework (see Figure 2.1) based on previous studies. The model will provide important managerial implications from a new integrated perspective.

Figure 2.1 Consumer Based Brand Equity Model



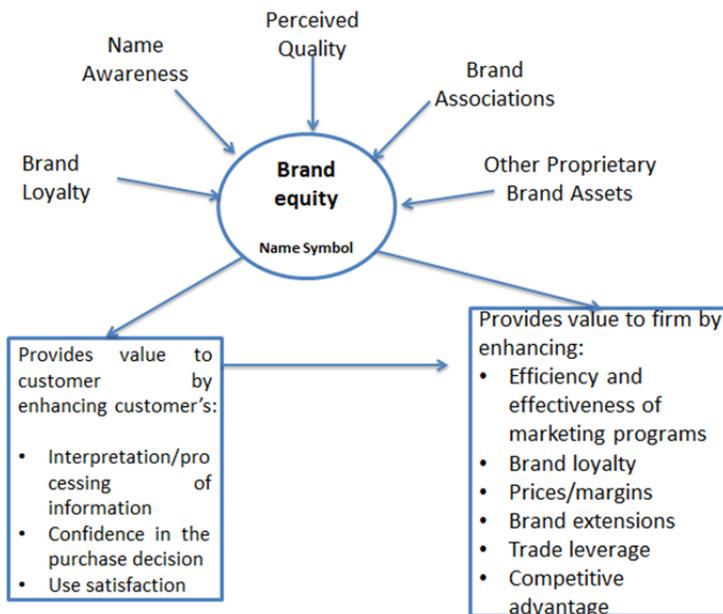
As shown in figure above, different colors and character style represent models put forward by different academics. The model is composed of three parts. On the left side of the model, blue parts come from Keller (1993) (see Figure 2.2). Keller points out that the sources of brand knowledge are brand awareness and brand image. Brand image is constituted by a series of brand associations in memory. While, David A. Aaker (1991) model (yellow part in Figure 2.1) includes five elements (see Figure 2.3), which are brand awareness, brand association, brand loyalty, perceived quality, and other proprietary brand assets. Aaker's model is a pioneered systematic model of consumer based brand equity, but the model neither explain the relationship between each element, nor the measurement of brand equity (P. Z. Wang et al., 2007). Besides brand recall and brand recognition, David A. Aaker (1991) actually gave another two levels of brand awareness, which are top-of-mind awareness and unaware of brand. There are two reasons of choosing brand recall and brand recognition in this study. On the one hand, they appear in both Aaker and Keller's models, but also they are recognized by most other scholars (Elliott & Percy, 2007; Vieceli & Shaw, 2011). On the other hand, unaware of brand cannot be called brand awareness, and top-of-mind awareness is part of brand salience that will be explained, following.

Figure 2.2 Keller's Model



Source: (Keller, 1998)

Figure 2.3 Aaker's Model



Source : (David A. Aaker, 1991)

The most important element in the overall model (Figure 2.1) is brand salience. Brand salience plays a connecting role between marketing activities and brand performance in the

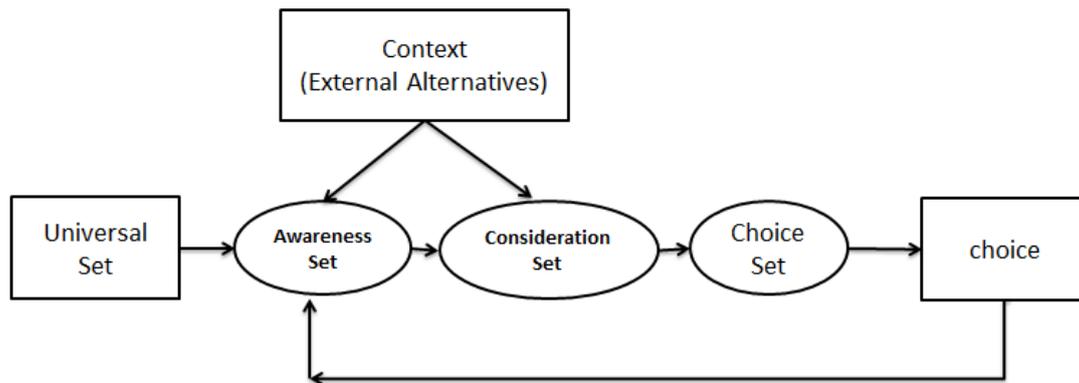
market (e.g. brand loyalty). Furthermore, double jeopardy is one of the consequences of brand loyalty. Double jeopardy (Goodhardt, Ehrenberg, & Chatfield, 1984) explains the relationship between why the more loyalty customers a brand has, the higher repeat purchase rate of this brand is. Overall, the antecedents of brand salience are lots of strong, unique brand associations and high likely brand awareness, and the outcomes of brand salience are loyalty customers, and highly possibility of repeat purchase rate (Vieceli & Shaw, 2011). The sales success of a competitive brand is depending on how salient the brand is. In short, this research will demonstrate making using of brand salience and double jeopardy together that evaluate comprehensive brand performance from both attitudinal and behavioral respects.

2.4 Brand Salience

2.4.1 What is Brand Salience?

As the name suggests, brand salience means one brand or a small group of brands are outstanding in consumers' mind. Without any product brand or category prompt, consumers are able to come up with salient brands. These brands are likely the consideration set (Olshavsky, 1994) of what consumers will buy in real life (see Figure 2.4). This phenomenon is as referred to brand salience. The research about brand salience has been restricted to a few author groups, but it has been increasingly discussed (Andrew S.C. Ehrenberg, Barnard, & Scriven, 1997; J. Romaniuk & Sharp, 2004; Trembath, Romaniuk, & Lockshin, 2011). Brand salience is worthy of further in-depth research, not only for branding management, but also for consumer behavior and cognitive psychology. It measures and summarizes the essence of marketing activities leading to profits. Table 2.1 is a summarized list of literatures about brand salience. The definitions are either proposed by the writers themselves or improved from prior studies. It can be seen that the definition of brand salience has developed from simple to complex and focuses from short-term to long-term.

Figure 2.4 The Existing Model of Consideration Set Formation



Source: (Olshavsky, 1994)

Table 2.1 Definition of Brand Salience from the Literature

Definition	Reference
“Salience,” refers to the <i>prominence</i> or “level of activation” of a brand in memory.	(Alba & Chattopadhyay, 1986)
Brand salience is the common factor in how many people are <i>aware</i> of the brand (by any measure), have it in their <i>consideration set</i> , regard it as <i>value-for-money</i> , <i>buy it or use it</i> and so on.	(Andrew S.C. Ehrenberg et al., 1997)
“Brand salience” refers to the <i>order</i> in which brands come to mind.	(Miller & Berry, 1998)
Salience generally refers to the <i>accessibility</i> or <i>easiness</i> of activation of a certain memory content	(Gluck & Indurkha, 2001)
The concept of salience, which has been referred to as the “ <i>prominence</i> ” of the brand in consumer memory rather than attitude.	(Jenni Romaniuk, 2003)
Salience is conceptualized as the probability that a customer will <i>think</i> of the brand at some point in time.	(Jenni Romaniuk & Byron Sharp, 2003)
Brand salience—the extent to which a brand visually <i>stand out</i> from its competitors—is vital in competing on the shelf.	(Lans, Pieters, & Wedel, 2008)
Brand salience is defined in this paper as the probability that a brand will be <i>recalled early</i> in a consumer’s consideration set, under a variety of situations and via a variety of stimuli, to the exclusion of competing brands.	(Vieceli & Shaw, 2010)

Brand salience is about the <i>long-term accessibility</i> of the brand.	(Trembath et al., 2011)
Brand <i>associations</i> influence consumers' salience and evaluation of a brand.	(Jenni Romaniuk, 2013)

The meaning of “saliency” originally came from Krech and Crutchfield (1948) in the area of social psychology. They use salient to describe attitudes and opinions for the individual standing out from the others. Their explanation provides enough knowledge about this kind of behavior, which is easily to understand. It is Alba and Chattopadhyay (1986) firstly gave a definition of salience in branding context, and found high salience of brands could inhibit the recall of low salience of brands. They also put forward that there are knowledge set, retrieval set and consideration set to describe how brands are chosen from memory (Alba & Chattopadhyay, 1985). Alba and Chattopadhyay’s “inhibiting brand name recall” was offered by Rundus (1973), who first suggests there are direct associations between category names and examples of those categories. After Alba and Chattopadhyay, Andrew S.C. Ehrenberg et al. (1997) expand and explain more about brand salience. Alba and Chattopadhyay mainly investigate brand salience when customers are stimulated in certain circumstances, but Andrew S.C. Ehrenberg et al. argue that brand salience should happen in any situation. Moreover people should not only be aware of the brand, but also do buy and use it. The research done by Miller and Berry (1998) focus more on the order of brand recall, so they believe brand salience is top-of-mind awareness and unaided brand awareness. Romaniuk and Sharp have been identified as major contributors of development of brand salience. They use the measurement of brand attributes to represent the level of brand salience. Vieceli and Shaw (2011) classified brand salience into five categories, which are prominence, familiarity, accessibility, order and associations. In this research, brand salience is discussed from the perspective of accessibility and associations. Overall, a salient brand should have the most positive associations and top-of mind awareness in the memory of consumers. Thus, consumers can think of this brand without cues or only the cues of its category in any situation.

2.4.2 How Does Brand Salience Work?

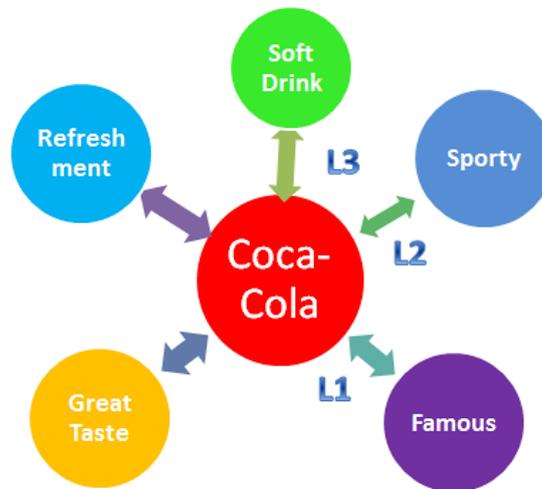
Associative Network Memory Model

Before understanding brand salience, it is essential to understand Associative Network Theory (ANT) of human memory first, which provides a conceptual framework from cognitive psychology for understanding marketing phenomenon. The model's prototype is Activation Theory of Memory (Anderson, 1983b), first proposed in 1976. After that, the theory was improved and widely known as associative network model of memory (Anderson, 1983b; Martindale, 1991; Shocker, Ben-Akiva, Boccara, & Nedungadi, 1991). The model explains the process of how people encode, store and retrieve information (Anderson, 1983a). The following will expand from these three aspects.

Encoding

Companies spent a great proportion of their cost on advertisements and promotions of their brands, as it can make consumers build a network of the brands in their minds (Jenni Romaniuk, 2003). According to Pappu and Quester (2006), the diagram (Figure 2.5) below is summarized to aid in understanding the network. This is just one example of associative networks in consumer's memory. Each network is consisted of few nodes. The central information (Coca-Cola) is called concept node (Anderson, 1983a). The nodes around the concept (famous, sporty, soft drink, refreshment and great taste) are called proposition node. In marketing context, the information stored in proposition nodes is also called attributes of the brand. The distance of the link between propositions and concept varies (Anderson, 1983a), which means the strength between brand and different attributes is different (J. Romaniuk & Sharp, 2004). For example, people may link 'Famous' with Fonterra's milk directly, but not Pam's milk. Furthermore, the link, also called a brand association, displayed below, works in both directions (Pappu & Quester, 2006). That is to say, when consumers provide Coca-Cola as a brand, they may recall it is in the category of soft drink. Conversely, if consumers are given soft drink as the activation, they could recall either Coca-Cola or Pepsi Cola. It is likely that people recall Coca-Cola first, due to the association between Coca-Cola and soft drink is shorter than the association between Pepsi Cola and soft drink.

Figure 2.5 Example of Association Network Model of Memory



Storage

A memorized brand goes through transient working memory to permanent long-term memory (Ruchkin, Grafman, Cameron, & Berndt, 2003). Even it stays in long-term memory, the strength between brand and associations will decay (Anderson, 1983b), but slowly. Anderson (1983b) also provided formulae to calculate strength value and retrieval time. If consumers have observed the information cue more than once, the information cue will enhance the connection between the brand and the image exposed (J. Romaniuk & Sharp, 2004). That is why advertisements have to be repeated again and again. Till (1998) deduces implications that it is better to use celebrity endorsements consistently over time. Under such circumstances, the brand and the celebrity are the nodes of the association. If the old celebrity is replaced by a new one, people have to build another association from the brand.

Retrieval

Retrieval happens when there is activation, such as writing notes on their shopping list, or standing in front of the shelf in the supermarket. There is a list of brands in consumers' brain. All brands known to consumers are referred to as the knowledge set, and the brands recalled in buying situations are the retrieval set (Alba & Chattopadhyay, 1985). Retrieval set is only a small portion of the knowledge set. Even though all the available brands are physically in front of consumers, they will still retrieve information from memory and then decide which one to buy (J. Romaniuk & Sharp, 2004).

Academics use cues (Alba & Chattopadhyay, 1985; Hastak & Mitra, 1996; Rundus, 1973) as the activations that consumers connect brands with. Cues can happen anytime, for instance, before customers entering into supermarkets, or suddenly when a glimpse of a familiar logo in someone's trolley. Consumers seldom notice why they enter into one certain shop not another one, or pick up one dress on the shelf not others. It is one of the reasons brand salience was neglected in the past (J. Romaniuk & Sharp, 2004). It occurs subconsciously. Cues are not stable: The same brand may not be bought twice in different situations, even with the same set of cues (Alba & Chattopadhyay, 1985). Holden (1993) found a wide variety of cues, and three commonly used types are product category attributes, benefits attributes and situation-based attributes (Jenni Romaniuk, 2003). There is a close relationship between cues and attributes in the scope of brand equity in some literature. From a marketing perspective, attributes can act as retrieval cues. However, cues are commonly more used in the field of cognitive psychology. Attributes also play roles as evaluating criteria between brands after they have been retrieved.

Alba and Chattopadhyay (1985) initially points out that brand cues can inhibit brand recall, but Nedungadi (1990) offers the opposite opinion, which proposes that brand cues play a role in facilitating brand recall. While through the research of Hastak and Mitra (1996), and Miniard, Unnava, and Bhatla (1989), they find that the a single brand cue, opposed to a highly salient cue, did not inhibit recall. Anderson (2013) has recently claims that the inhibitory effects appear after facilitatory effects, through observation. In addition the more cues of a brand, the more likely consumers will think of on the scene of shopping, and the greater propensity of the brand will be bought (Jenni Romaniuk, 2003). The aim of 'feel good' brand advertisements or promotions without specific attribute cues to push brands to stay in consumers' minds. However, it does not mean the company should always develop many attributes of the brand. Anderson (1983a) claims that if the brand has too many links our from the central concept, the strength of association between brands and attributes will be weaker, and less slowly be recognized. The appropriate number differs according to different industry and customers.

The above explains the brand-centered network model in buyers' memory. To put it simply, once there is a cue that activates the network, consumers will have a retrieval set of few selected brands, and then consumers will look for attribute associations for each brand from their memory. The model is a first step to understand the principles of how a salient brand

can stand out from its competitors. In the case of shopping in supermarkets, it is difficult for people to choose a brand from products filling with more than three layers of shelves. Shoppers usually notice the products displayed in the shelf parallel to their eye levels, and then their eyes movement is from the bottom to the top (Lans et al., 2008). Brands that people first notice play the strongest impression in their mind. It is “brand salience” that plays a significant role during the short time devoted to choice. The more salient a brand is, the higher the possibility that the brand will be purchased, and the less that chance consumers will switch their brand loyalty (Jenni Romaniuk & Byron Sharp, 2003). Some academics (Trembath et al., 2011; Vieceli & Shaw, 2010) put forward that brand salience is more effective during low-involvement purchase process. However, the aim of this study will show brand salience is not restricted to only low-involvement products and categories.

2.4.3 How to Measure Brand Salience?

It seems brand salience is an abstract concept, from the literatures written above. Even J. Romaniuk and Sharp (2004) think it is unlikely to capture all aspects of brand salience from a single survey, owing to the complexity of memory and the lack of awareness by the buyer of the process. This study will put forward a simple measurement of brand salience, on the basis of integration of the results of previous studies.

Measuring brand salience is actually measuring brand performance in consumers’ mind. There are currently two main approaches, which one of them is based on associative network memory model using the NBD-Dirichlet model (Jenni Romaniuk, 2013), and the other one is called perceptual mapping method by means of correspondence analysis (Bendixen, 1995). The former method experienced a series of evolution. In the early literatures, Alba and Chattopadhyay (1985) asked the participants to name all the brands (use shampoo as the object) they could recall. It is an individual test for up to 5 minutes, and different numbers of shampoo brands were provided for different groups in advance. Lately, J. Romaniuk, who is the main contributor, published a lot of articles by herself or with other researchers (Jenni Romaniuk, 2003, 2013; J. Romaniuk & Sharp, 2004). The similarities of her researches are that respondents were all provided with more than a dozen of attributes, and were asked to associate each brand with a list of attributes. Researches have been done in the category of fast food, telecommunications market, fast-moving consumer goods (FMCG) market, and

tourism market. J. Romaniuk and Sharp (2004) propose a framework for measuring brand salience, which is useful as a guidebook. There are few points worth noting during research, such as letting participants answer yes or no according to the attributes provided in advance rather than Likert-type rating scales (e.g. how much do you think that Brand A is value-for-money?), and measuring the brand with competitors at the same time rather than a single brand in isolation. Research designed recently by Jenni Romaniuk (2013) has improved from previous research. During that experiment, respondents had to associate brands of carbonated drinks to attributes. The result below shows the NBD-Dirichlet model can be applied to offer benchmarks for the underlying structure of a brand's associative network. Most brands' observed association penetration (Ab) and associate rate (Aw), except Diet Coke and Sunny Delight, are nearly matched with the estimated data. Romanuik's paper only explains that model deviations are beyond the scope of the paper. She leaves it for future research, which will be addressed in this paper following.

Figure 2.6 An Example of How to Measure Brand Salience by using the Dirichlet Model

NBD-Dirichlet fit of mental market share for carbonated drinks.

	MMS %		Ab %		Aw (mean)		SOM %		
	Obs	Est.	Obs	Est.	Obs	Est.	Obs	Est.	
Coca-cola	23	23	94	88	5.2	5.6	30	23	
Fanta	12	12	68	73	3.7	3.4	16	13	
Diet Coke	10	10	51	68	4.2	3.1	18	12	
Pepsi Cola	9	9	66	67	3.1	3.0	13	11	
Dr Pepper	9	9	59	66	3.3	2.9	13	11	Mental market share=MMS
Sprite	9	9	66	65	2.9	2.9	14	11	
7 Up	7	7	56	59	2.8	2.6	11	10	
Lilt	7	7	55	58	2.8	2.6	11	9	Associative penetration=Ab
Sunny Delight	7	7	47	57	3.1	2.6	12	9	
Schweppes	5	5	54	50	2.2	2.3	9	8	Association rate=Aw
Virgin Cola	2	2	30	28	1.7	1.8	7	6	
Average	9	9	59	62	3.2	3.0	14	11	Share of mind=SOM
Mean AbsEr	0.03		5		0.3		3		
Corr. Obs v Est	1.00*		0.90*		0.91*		0.98*		

Obs = data from survey; Est = NBD-Dirichlet estimations.
 * p<0.01.

Source: (Jenni Romaniuk, 2013)

This measurement has a few disadvantages. It is complicated with a lot of numbers, so practitioners may not easily get the whole picture. Without the numbers, brand managers probably already know the market rank of Pepsi Cola behind Coca-Cola. From the perspective of Pepsi Cola's brand managers, they may be disappointed because their market share is behind that of Diet Coke, and naturally want to know the reasons for that. The aim of

studying brand salience is to provide useful tools for practitioners, and add to previous academic research by studying a practical application—milk in China.

Another method for understanding brands attributes is constructing perceptual maps by using correspondence analysis. As brand associations are directional, perceptual maps are divided into two broad categories: decompositional (attribute-free) and compositional (attribute-based) (Bendixen, 1995). Figure 2.7 is an example of attribute-based approach, which is more visualized to present which attributes are associated with which type of wine (Sirieix & Remaud, 2010). Perceptual mapping belongs to multi-attribute positioning approach, and the other ways of brand attribute positioning are single attribute positioning and share of mind (J. Romaniuk & Byron Sharp, 2003). No matter whether mental market share method, or perceptual mapping, is used, they use the same type of data, which are a set of associated attributes. The advantage of measuring attributes is cost-saving, as it can be obtained from simple questionnaires, not panel data (Torres & Bijmolt, 2009). It is an important tool for understanding the position and distinctiveness of these brands (Bendixen, 1995; Sirieix & Remaud, 2010). However, the weakness of perceptual mapping is that it cannot diagnose the rank of these brands in the market. The model is not stable as well, because the map will be different with adding or deleting one attribute. Besides, it cannot predict the development of the brands.

Figure 2.7 An Example of Measurement by Using Perceptual Mapping

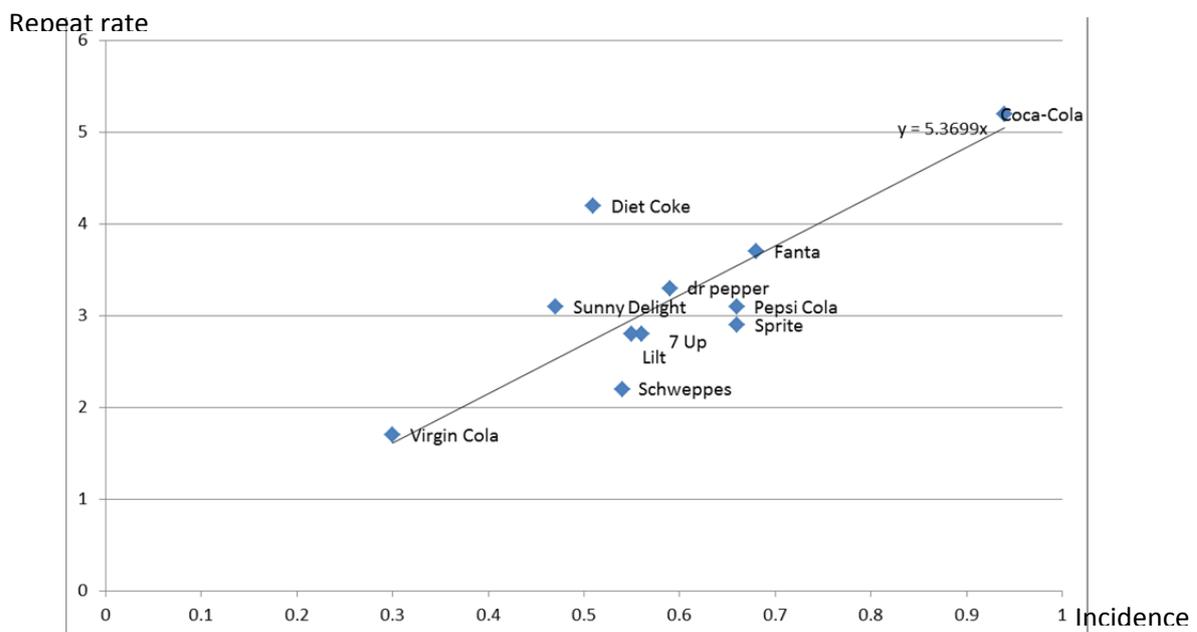


Source: (Sirieix & Remaud, 2010)

Improvements from Previous Models

On the basis of previous studies, the model for this research makes a few improvements as follows: Firstly, by making charts for association rate versus association penetration instead of showing only tables. By borrowing data from Jenni Romaniuk (2013), the graph below is made. It can illustrate the level of brand salience in consumers' mind. The horizontal axis is association penetration, which means the proportion of people giving at least one brand association. The vertical axis represents association rate, which calculates how many associations by those who have at least one brand association. The reason of choosing these two variables is because they are typical X—Y graph for a causal relationship, as in X (horizontal) causes Y (vertical). The pattern is that the more people give at least one brand association, the more associations will be given by those who have at least one brand association. Through a more visual method, brand managers will more clearly know if their brands perform well in the market.

Figure 2.8 Example of Brand Salience Model



Source: (Jenni Romaniuk, 2013)

Secondly, the interpretation is important of the result. The Figure 2.8 shows that some brands (e.g. Sprite, Schweppes, and Diet Coke) are out of line, because they are in another category of mind. If brand managers do not realize this, mistakes will be made. Taking Diet Coke as the example, from the graph, people who associated at least once with the brand associated many

more attributes than the model predicts for the rest of the category. From the other perspective, with the same attributes associated, diet coke has less people associating it: Brand managers risk assuming that there is not enough coverage of advertisements without the benefit of the brand salience graph (Figure 2.8). They may inadvertently spend more money on advertisements, in magazines, on TV, and on social media. However, it may be owing to that Diet Coke is different to all other sugar drinks. People who buy the brand may do not buy normal coke, for example. On the other side of the line, Sprite and Schweppes both have fewer attributes comparing to the brands with the same number of people who associated at least once. It is because these two brands are both clear and non-fruit flavored fizzy drinks, often used as a cocktail mixer, similarly, these are likely not in the same category of the mind as the rest. Thus people who buy the brand may not buy normal coke. Without the understanding of the analysis, managers may mistakenly consider their advertisements are ineffective, or the quality of the advertisements is not satisfying. After exclusion brands of a different category, the other brands will be position consistently on the line. It is not a coincidence, and the research of this study will examine the applicability of this model.

In addition, the model is able to explain and predict brand performance patterns by using the Dirichlet model (Andrew S.C. Ehrenberg, Uncles, & Goodhardt, 2004). This information is useful for practitioners as well. Brand salience is measuring mental market share, so combing it with findings of sales market share will help the marketers understand further (Jenni Romaniuk, 2013). As Jenni Romaniuk, Sharp, Paech, and Driesener (2004) and Jenni Romaniuk (2013) both put forward that brand salience shows some ability to predict the real market share, and therefore demonstrate external validity. If the results of two methods do not fit with each other, there should be a signal of problems for brand management. Double jeopardy is another part of this research, which will be explained later, as a tool to measure brand performance in the real market. In this study, I compare mental market share to brand purchase rank by volume to demonstrate the behavioral link

2.5 Awareness and Brand salience

The agency DDB Worldwide Communications Group Inc. (DDB) once did a survey about asking marketing directors which characteristics they consider to be significant for a strong

brand (Kapferer, 1997). Surprisingly, 65 percent directors chose brand awareness as the most important factor. Besides, the strength of signs of recognition by the customer was chosen by 36 percent people. It shows that brand awareness plays a significant role in brand management. Brand awareness influences consumers' decision-making, especially for low-involvement purchase decision process (Huang & Sarigollu, 2012; Keller, 1998). It is important to have a high level of brand awareness under various of conditions and circumstances (Keller, 1998). The same thing was mentioned by Trembath et al. (2011), what they believe is that brand is better to be thought by as many consumers as possible, not how well people regard the brand. A noteworthy point is that brand managers should not only pursue high level of brand awareness, but also positive awareness.

Brand awareness is classified into two types, which are brand recall (also known as spontaneous awareness), and brand recognition (also known as aided awareness) (Jenni Romaniuk et al., 2004). David A. Aaker (1991) states that brand awareness involves another level, which is top of mind awareness. Top-of-mind awareness is achieved from the first named brand in an unaided recall task (David A. Aaker, 1996; Laurent, Kapferer, & Roussel, 1995). However, as mentioned earlier, top of mind awareness can be conceptualized as a part of brand salience. Conversely, brand salience is not just about brand awareness. Andrew S.C. Ehrenberg et al. (1997) note that a brand which is more salient will have more people who are aware of it (no matter through which awareness measure), who are familiar with the brand, who have positive brand attributes of the brand, and more people who are loyalty.

Two types of brand awareness activate the network of brands in different directions. Brand recall is prompted by some definition of the product field, but brand recognition is prompted by showing consumers the brand names (Vieceli & Shaw, 2011). For example, people only write product category on their shopping list (e.g. bread, honey, or milk), then they will find certain brand in the supermarket. It is the process of brand recall. The typical situation of brand recognition is when consumers occasionally see Cadbury chocolate in shops. It is not on their shopping list, but the brand name reminds them that it worth being bought. It is brand recognition. Brand recognition often happens in store, and brand recall often happens outside the store (Keller, 1998). Recognition awareness measurement is easier to achieve than recall awareness measurement (Elliott & Percy, 2007), as it is an easier cognition for the human brain. The nature of brand awareness results in brand bi-directional associations (Anderson, 1983b; Pappu & Quester, 2006). In addition, although Keller did not mention top-of mind

awareness, Keller (2003b) put brand salience as a separate part of consumer based brand equity, and defined it as possessing both depth and breadth of brand awareness. Therefore, brand awareness is the first step of achieving brand salience.

How to achieve brand awareness? It is especially important for low involvement products, as it is decided in one or two seconds (Vieceli & Shaw, 2010). The first step is gaining recognition in order to create familiarity with the brand (David A. Aaker, 1991). It is because that brand awareness starts from ‘unaware of a brand’, moves to ‘brand recognition’, and then to ‘brand recall’ (David A. Aaker, 1991). Advertising, promotion, sponsorship and event marketing, publicity and public relations and outdoor advertising can potentially increase familiarity and awareness of the brand (Keller, 1998). After a brand has got enough recognition, it is more sensitive and meaningful to work on brand recall (such as Budweiser, cheerios, and Chevrolet). It is likely that increasingly brand awareness will lead to the increase of market share (Huang & Sarigollu, 2012).

2.6 Associations and Brand Salience

J. Romaniuk and Sharp (2004) use quantity (how many) and quality (how fresh and relevant) of the network of brand information in memory to reflect brand salience. In the context, quantity and quality mean the number and effectiveness of brand associations in the network. Awareness itself cannot create sales (David A. Aaker, 1991), so it has to be complement with brand associations. Brand associations are a core component of consumer based brand equity (Jenni Romaniuk & Nenycz-Thiel, 2013). Brand associations mainly play two roles: the first is as cues for customers to evoke brands from memory; the second is to help customers decide which of the subset of brands is appropriate at that point of time (Nedungadi, 1990; Jenni Romaniuk, 2013). The more associations a brand has, the more likely the consumer will choose the brand (Jenni Romaniuk, 2013; Vieceli & Shaw, 2010). Many researches have also proved the positive relationship between brand associations and customer loyalty (Jenni Romaniuk & Byron Sharp, 2003; P. Z. Wang et al., 2007). The resulting brand associations held in a consumer’s memory constitute the brand image, and affect their behavior (Torres & Bijmolt, 2009). Because it is related with human psychological activities, consumers have different values for different categories of brands. In the context of consumer based brand equity, the associative network memory model can be represented as the breadth and depth of

brand association (Vieceli & Shaw, 2010). Therefore, the measurements of brand salience mentioned earlier calculate the number of attributes that participants could associate with the brand.

Furthermore, the differentiation between brand association and brand attribute is not clearly described in the existing literature. It is significant to understand that different researchers often use same terms to represent slightly different concepts. Association means the connection between attributes and brands (Anderson, 1983b; Torres & Bijmolt, 2009), as its original meaning is “a mental connection between ideas or things” (“Association,” n.d.). Association can only be measured by strength, either strong or weak. Attribute is those descriptive features that characterize a product or service (Keller, 1993). Keller (1993) groups brand associations into three major categories: attributes, benefits, and attitudes. On the basis, attributes include product-related attributes (e.g. gluten or gluten-free), non-product-related attributes (e.g. package, price, country of origin), and benefits involve functional (e.g. eliminating-dandruff shampoo), symbolic (e.g. luxury brands), experiential benefits (e.g. scent or feeling of beauty). However, the definition of each category is overlapped and unclear. This research will use attributes to represent all the situations related with the category. Although the words may be different, the concepts expressed here are fundamentally the same (Elliott & Percy, 2007). Besides advertising, point-of-purchase displays, free samples, and special price deals are all promotion devices, through which customers acquire product attributes (Schiffman, 2011). More brand associations should lead to higher level of brand salience (Vieceli & Shaw, 2010).

2.7 The Outcome of Brand Salience

Brand salience has an impact on future purchase likelihood (Vieceli & Shaw, 2010). As brand equity is compromised by many parts, shown in Figure 2.1, brand salience is the connection between brand equity and brand loyalty. Much literature studies and supports the positive relationship between brand equity and brand loyalty (David A. Aaker, 1996; Jenni Romaniuk & Nenycz-Thiel, 2013; Steven et al., 2004; Walfried et al., 1995). There is no reason not to believe that if brand salience is managed well, it will lead to greater brand loyalty. In turn, increased brand loyalty will increase the salience of the brand (shown in the Figure 2.1).

2.7.1 Brand Loyalty

Brand loyalty is closely related to brand equity (Keller, 2003b). David A. Aaker (1996) hold view that brand loyalty is a core unit of brand equity. Brand loyalty it is more specific, and more well-known to everyone. It has been researched more in depth. Loyal consumers are easily identified. It is hard to say if brand equity happens first or brand loyalty. The reason that loyal customers chose certain brands could be because the brand has a better brand image, or the value added to the brand is more important to them. These are involved in the research area of brand equity. However, brand equity leads to brand loyalty, to added market share, and eventually to greater profits (Schiffman, 1997). The model (Figure 2.1) actually is a close loop, as brand equity and brand loyalty reinforce each other in the long run.

Consumers of a brand may be practically divided into three loyalty groups, which are (1) loyal buyers of a brand, (2) brand switchers, and (3) non-customers (David A. Aaker, 1996). Loyal buyers could be willing to spend more time on searching the brand in a new distribution channel, pay premium price on the brand, and recommend the brand to others (Yi & La, 2004). Different types of customers result in different market segmentations' strategies (Schiffman, 1997). Besides, brand loyalty involves both attitudinal and behavioral features (Arjun, 1995; Doyle, Filo, McDonald, & Funk, 2012; Schiffman, 2011), although not always in the same study. Behavioral loyalty is evidenced by that customers who repeatedly purchase your brand compared to the total number of purchases they make in that category during a period of time (Neal, 2008), which can be in turn transferred to measurable financial brand equity. Attitudinal loyalty is of little value unless people's purchase willingness or overall satisfaction is translated into action (Neal, 2008). Therefore, only measuring either aspect of brand loyalty is not measuring the real total loyalty. Some practitioners believe that it is essential to measure both attitudes and actual behaviors to a brand (Schiffman, 2011). This is another reason for putting brand salience and double jeopardy together. Behavioral and cognitive theories will be both studied. As a result, it can diagnose if customers are behaviorally loyal or attitudinally loyal. It is important for marketers to understand if their brand performs the same both in the consumers' mind and in the market.

2.7.2 Double Jeopardy

Every company's goal includes having its brand with high customer loyalty (Yang, Bi, & Zhou, 2005). As loyalty requires both psychological and behavioral measurements, this study chose repeat purchase behavior as one aspect of the performance of brand loyalty. The number of buyers and purchase frequency are related to the Double Jeopardy effect: those small brands are more likely to suffer in two respects—they have fewer purchasers who buy the brand less often than larger brands (Mark D Uncles, 2011).

A. Ehrenberg and Goodhardt (2002) describe that people not knowing about double jeopardy is like rocket scientists not knowing the earth is round. Andrew S. C. Ehrenberg, Goodhardt, and Barwise (1990) state that double jeopardy was not widely known not only for marketing scholars, but also not for marketing practitioners. This has not changed much after decades. Double jeopardy is not only argued as the best-known empirical generalization in marketing (M. Uncles, Ehrenberg, & Hammond, 1995), but also a useful diagnostic tool to evaluate brand performance (Janet, Zane, & Kathryn, 2003). Double jeopardy was emphasized as a “lawlike” theory, which can indeed interpret the market better, and then managers are able to plan brand strategies accordingly (Arjun, 1995; A. Ehrenberg & Goodhardt, 2002).

Double jeopardy was firstly proposed by McPhee in 1963 (Mcphee, 1963). The name was given because McPhee thought it is unfair for less popular products suffering from less loyalty (Andrew S. C. Ehrenberg et al., 1990). In the beginning of the study, double jeopardy was applied on Hollywood actors, comic strips, and radio presenters. Expanded by A. Ehrenberg and his colleagues, who is the main scholar developing the theory after it was put forward, double jeopardy has begun applicable in brand management in the category of packaged goods and fast-moving consumer goods (FMCG). Few studies have been conducted in Europe, North America (Wright, Sharp, & Sharp, 1998), and Australasian markets (Wright et al., 1998) across different categories of product (e.g. coffee, TV series and automobile). However, there is relatively little work undertaken in China. Mark D. Uncles and Kwok (2008) and Mark D. Uncles, Wang, and Kwok (2010) did research in China on six different categories of packaged goods (include toothpaste, instant noodles, carbonated soft drinks, laundry detergent, yogurt and soy sauce) across eight cities during five years. It found that brand managers can use double jeopardy to predict patterns of store-type patronage in China. The model is very useful of making diagnostics among very competitive markets.

Therefore, the model can describe and conceptualize past and current consumer buying behavior patterns, and it also has the ability of predicting the future development of brands in competitive markets (Andrew S. C. Ehrenberg et al., 1990; Mark D. Uncles et al., 2010). From practitioners' point of view, double jeopardy helps to solve problems when they need to react when another brand decreases its products' price, or find out if a new brand will be their powerful competitors (Janet et al., 2003).

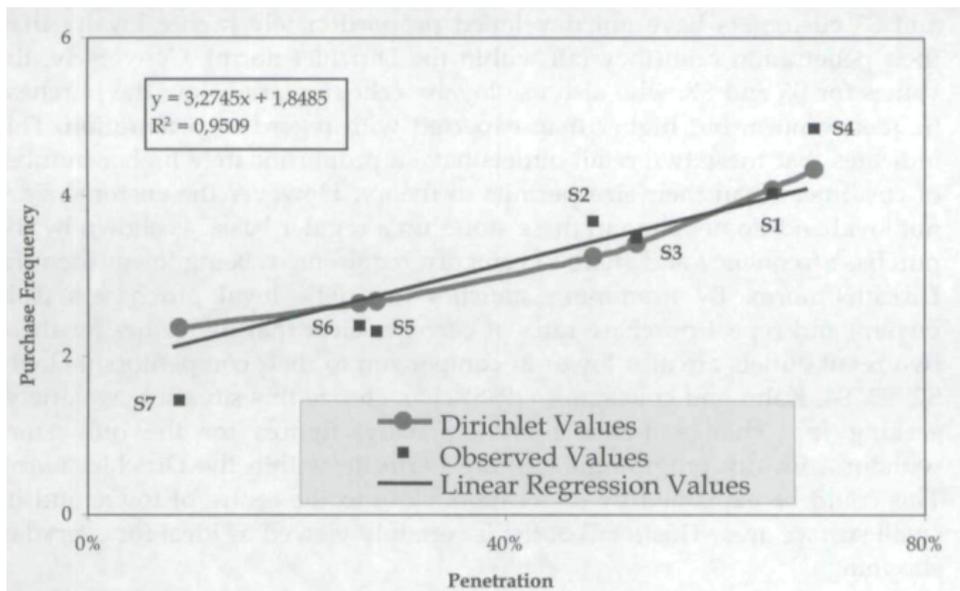
2.7.3 How to Measure Double Jeopardy?

Applying the Negative Binomial Distribution (NBD) and the Dirichlet multinomial distribution models is able to actually model all the double jeopardy patterns (A. Ehrenberg & Goodhardt, 2002; Meyer-waarden & Benavent, 2006; Wright et al., 1998). The measurement is simple and useful.

Although there are scholars argue that the Dirichlet model is a zero-order static stochastic model, i.e. non-dynamic, static, it is recommended by various researches (Meyer-waarden & Benavent, 2006) that it is still useful. One of the reasons is that market shares of different brands tend to be stable in a period of time, so marketing mix activities is a stable net effect. Besides, comparing to the real market with the empirical stable market, the model allows practitioners to check if the brand behaving as it is supposed to be, under normal, nearly stationary situations.

The most important two variables in the model are penetration and average purchase frequency. The figure below is an example of double jeopardy through applying the NBD-Dirichlet model. From the Figure 2.9, point S4 shows "excessive loyalty", because its purchase frequency is higher than the predicted values. It means people, who go to the shop, visit it more often than expected. The phenomenon is no problem, but if the shop wants to expand, it could think about open another branch. Conversely, S7 is the opposite way. It has more penetration at the level of purchase frequency. The reason might be that the shop sells something different with the others, but price is more expensive.

Figure 2.9 Double Jeopardy Whole Market



Source: (Meyer-waarden & Benavent, 2006)

Average Purchase Rate for brand j

$$\frac{\alpha_j \gamma \beta}{S}$$

Penetration for brand j

$$= \sum_{k=1}^{\infty} f_{\gamma, \beta}(k) \left(1 - \frac{\Gamma(S) \Gamma(S - \alpha_j + k)}{\Gamma(S + k) \Gamma(S - \alpha_j)} \right)$$

Given where α_j : Dirichlet parameter for brand j NBD Shape parameter: γ , NBD scale parameter: β , a set of random variables: $R_j, R_1 + R_2 + \dots + R_h = k$, number of brands: h , Dirichlet $S = \sum_{j=1}^h \alpha_j$.

Refer to Rungie and Goodhardt (2004), which has detailed calculation steps. As for the points outlying the regression line, there are few explanations: Doyle et al. (2012) summarize that the exceptions could be niche brands (e.g. Monster Energy drink), super-loyal customers (e.g. Apple) and change-of-pace brands (e.g. low alcohol drink). If the brand does not belong to any of the above situations, it could be that the problem is its distribution, price or promotion, according to specific conditions.

2.8 Summary

This research is one of the two studies to undertake brand salience (or functional equivalent) and double jeopardy together, comparing consumers' mental market share and the actual market share for (Subir & Kunal, 2004). The result will highlight deficiencies in the marketing activities that may hampering brand equity transforming into sales. Previous scholars have put forward that comparing the scores in two market is vital for future research (Jenni Romaniuk, 2013). Theoretically speaking, if the brands are managed without problems, the brand ranks in mental and actual market share should be substantially the same, even though the real market will be influenced by price promotions or distributions. This method also covers two stages of brand loyalty, which are attitudinal and behavioral. Previous articles almost always do research from only one aspect, either mental or behavioral; this research will be a starting point for exploring them together.

Chapter Three

3.0 Methodology

After identifying the necessity of improving milk brands' management in China, and analyzing past studies about brand salience and double jeopardy, it is time to apply brand salience theories into practice. In the previous chapter, it is mentioned that various methods have been developed and introduced to measure brand salience and double jeopardy. This study has learnt lessons from previous studies, and it aims to firstly demonstrate, by these two concepts together, how simply brand performance can be measured. If the data support the theory, this method may be worthwhile to be widely used.

3.1 Introduction

The reason of choosing the category of milk as the research object has been introduced in the first chapter. As the result of the Melamine Scandal, the milk market in China is no longer as simple as it is compared to the other countries. Consumers are cautious of making a decision of purchasing milk brands. As a result, in order to achieve market position, brand managers should not only pursue the market share of brand, but also keep it salient in consumers' mind.

Mixed methods, namely both qualitative and quantitative data collection procedures were adopted for this study. Qualitative methods offer an effective way of getting a comprehensive view of the Chinese milk market from consumers coming from different areas in China. The project used a convenience sample of 7 Chinese students on campus at Otago University. The in-depth, semi-structured interviews were undertaken from April to May in 2014. The quantitative part included a structured online questionnaire, designed and revised with the help of previous interviews. Participants were recruited by using convenience and snowball sampling (Naresh K. Malhotra, 2010), such as friends and relatives. The survey was conducted in 2014. By analyzing the answers from the questionnaire, we are able to obtain detailed brand performance metrics both in consumers' minds and in the marketplace, and measure brand loyalty levels. In addition, this research will make be diagnostic, to identify which brands that are mismanaged or mis-categorised if any. This will demonstrate how this method can be a useful managerial tool for brand managers.

3.2 Research Design

As stated in the literature review, brand salience can be measured by counting associated attributes of the brands by respondents. To ensure all the attributes are covered, the attributes were identified and tested first in the interviews before the questionnaire was conducted. Because purchasing behavior contains a lot of personal opinions, the semi-structured interviews and open-ended questions were chosen. Along with interviews conducted, the questionnaire was revised and improved to guarantee that questions formed would give a comprehensive score for the dimensions of brand performance.

The questionnaire (see Appendix B) was divided into two sections: the first part concentrated on consumers' previous experiences with purchasing milk, and the second part addressed consumers' attitudes towards different milk brands. Questions were asked, like how much do you spend on milk each time, and how often do you buy milk, instead of asking directly how much do you spend on milk per week, in order to decrease participants' cognitive effort. There were questions about purchasing situations, type of milk package, and family composition. As for the brand-attribute associations, Likert scales were not chosen, as Driesener and Romaniuk (2006) show the results are similar when using either Likert-type rating scales or 'pick-any' brand-attribute association measures which a cognitively easier for the participant. It can also decrease participants' time for consideration. Therefore, from the previous experiences, we were able to derive two measures of double jeopardy model, namely penetration and purchase frequency; the second part similarly has two measures for the brand salience model, which are repeat association rate and incidence of attributes associated.

3.3 Qualitative Research

3.3.1 Sample

An entire of 7 interview participants were recruited for the research. The reason of focus group was not chosen is because participants' opinions will interrupt with each other during discussion. Like mentioned previously, someone's answer may play as a cue for another participant, thus the brand will inhibit the other brands to be retrieved. Taken reality into consideration, 7 interviews are sufficient at this stage. A small sample for qualitative research

is more controllable and less problematic (Davies, 2014). The eighth interview did not contribute any new information, so saturation had been achieved. The interview participants' age ranges from 20 to 27. There are 5 females and 2 males. The number of female participants accounts for more than 70%, owing to females being considered to have more expertise on shopping (Alba & Chattopadhyay, 1985). Their cities of residence are mainly from first-tier cities, with the reminder from second-tier cities (G. K. M. Wong & Yu, 2003) or costal development areas in China. From the Table 3.1, we can see that the milk consumption behavior of 26 people was researched in the interview. Because each participant represents one family, and each family at least have 3 family members. The detailed demographic is shown in Table 3.1.

Table 3.1 Participants' Demographic Characteristics

Participant	Age	Gender	Hometown City, Province	Family composition
1	22	female	Dalian, Liaoning	3 people (parents and her)
2	26	female	Tacheng, Xinjiang	3 people (parents and her)
3	25	female	Shanghai	3 people (parents and her)
4	21	female	Beijing	3 people (parents and her)
5	20	female	Beijing	3 people (parents and her)
6	25	male	Jiangmen, Guangdong	3 people (parents and him)
7	21	male	Xi'an, Shanxi	5 people (grandparents lives with his family together)
8	25	male	Beijing	3 people (parents and him)

It is noted that the second participant of the interview comes from the northwest part of China, which is a region of developed animal husbandry. In that area, they regard local fresh milk, with no formal package and brand name at all, more highly than the national big brands, which a formulated and packaged for longer life. The place of residence does matter in this situation, because national brands will not be salient no matter how well the brand is managed. Also, the participants been interviewed are all students studying abroad at their own expenses, so their household income is at the moderate level in China. From their answers, they prefer products with high quality, and they do not care about price so much, compared to families with lower income levels.

3.3.2 Procedure

Participants were selected from friends of mine, so their basic backgrounds are known before the interviews, like hometown in China and age. The prerequisite of participants is that they must have bought or drunk milk over the past year. Even though they are students, students are usually the main participants for academic research. From the answers they gave, parents do listen to their opinions about purchase choice during shopping. I had face-to-face interviews with them individually, and each respondent was asked about 15 open-ended questions during 20 to 30 minutes. At last they were shown pictures of different milk brands, and they were asked to associate each attribute with the milk brands provided. There is no participant reported problems in understanding or answering the questions.

Interviews were conducted between April and May in 2014, which was just the beginning of semester in the university. Because participants need to recall events that happened in China were better that the interviews were conducted soon after their return from home. Before the interviews commenced, the participants were informed of their rights and asked to read the information sheet provided (Appendix C). They were informed that the whole interview would be recorded. They agreed and completed the consent form. Questions began with were about their demographic background, because “how many people in your family” is related with “how much milk do they buy usually”. The answers we got actually represent the whole family’s consumption behavior. The full interviews’ transcripts are in the Appendix D.

Attribute Selection

Finally, a total of 13 attributes were developed from the qualitative component of the research, shown below in Table 3.2. the 13 attributes are equivalent to 13 possible choice situations (Jenni Romaniuk, 2013). Nestlé was used as a test value among 6 national brands, because it is the oldest foreign brand, not the same category of the mind as the others. Besides, each region has its own regional milk brands, so all the local milk brands are regarded as a group, called local brands. Note as stated earlier, local milk is not long-life formula milk, unlike all other national and foreign brands. The last attribute “it is a foreign brand” is especially designed for Nestlé, as it has been active in the Chinese market for over 100 years. It is wondered that how much proportion of people realize it is a foreign brand. The attribute about enhancing face as a gift was added from interviewees’ answers about their previous purchasing experience. It is a special phenomenon related with the Chinese culture

compared with other countries. High-ended milk brands are usually bought as gift for friends and relatives, especially during the holiday. Owing to regional differences in China, almost each province has its own regional milk brands. It is not available in other province.

In addition there is one thing should be noted of reading the Table 3.2 below. Participants have to choose the brand(s) which they think is (are) associated with each attribute, by reading along the row from left to right. It is important because if participants do another way around, the results will not be a fair measure of association and therefore useless (Torres & Bijmolt, 2009). The aim is to prompt attribute first in people’s mind, then they will find appropriate brands they think is linked with the attribute. If the participants read by each line, they may associate many attributes with each brand. This is an attribute dominated question. However, it is analyzed by vertical column-space. After collecting the data in the quantitative research, the incidence and repeat rate of brand salience and double jeopardy models can be used for further analysis.

Table 3.2 Table of Association Attributes and Brands in the Survey

	Mengniu	Yili	Deluxe	Jindian	Guangming(Bright)	Sanyuan	Nestlé	local
Famous								
Cheap								
Tasty								
Fresh								
Unpolluted								
Nutritious								
Trustable								
Convenient to buy								
Attractive ads or packaging								
Value-for-money								
Packaging is convenient								
Enhance face as a gift								
Is it a foreign brand?								

3.4 Quantitative Research

3.4.1 Sample

Online survey was launched after analyzing the qualitative research. In the survey, people who hardly care about the brand of milk were excluded from the research directly at first. The data was collected after the ethic form was approved. Respondents of surveys were obtained by using convenience and snowball sampling (N. K. Malhotra, Peterson, & Kleiser, 1999; Zikmund, Ward, Lowe, & Winzar, 2007). Compared to the participants in the qualitative part, there are more middle-aged participants, who have steady incomes, answering the questionnaire. Their opinions should be varied compared to the students.

3.4.2 Procedure

The survey was deployed to 270 respondents. 177 completed the questionnaires such that those can be used for the measurement of brand salience, and those can also be used for the measurement of double jeopardy. The sample covers 26 different cities. Online survey flow control helps respondents skip inappropriate questions and prompt brand attributes visually, which mail survey and telephone interview cannot achieve. Another advantage of using online survey is that respondents can take their time and fill in the form more carefully. There are 13 attributes described previous in the questionnaire, covering a wide variety of aspects of the brand. The attributes were chosen from the words interviewees mostly used as describing brands choice. People just need to tick or not in the table of attributes to represent if they agree the attribute is linked with the brand or not. The reasons of choosing 6 national brands, Nestlé, and local brands are: 6 national brands were chosen as the top six brands according to their market share. As the average number of chosen attributes is less than 5 of 13, it is assumed that the 13 attributes covered all main aspects of choice situations.

In the research of Jenni Romaniuk (2003), she notes this methodology did not control or measure past behavior. This study has improved on this aspect, as the participants are asked how much they spend on certain brand each week, and how often they buy that brand. Pictures of the brands are shown to participants, as I found only showing the name of the brand does not help enough to assist participants to recall the details of the brand or image of the brand.

3.5 Data Analysis

The results are analyzed by using the Dirichlet Model, which was developed by Goodhardt, Ehrenberg and Chatfield (Goodhardt et al., 1984; Rungie & Goodhardt, 2004). The model is the integration of the negative binomial distribution (NBD) and the Dirichlet multinomial distribution (DMD). Jenni Romaniuk (2013) has already used the model to predict patterns in buying behavior.

The DMD-NBD model estimates the brand association incidence and repeat association rate ASIF all brands are within the same category of the mind and all attributes are relevant to that category. Comparing observed and estimated brand association incidence and repeat association rate graphically will allow diagnoses of many brand performance problems, including mis-categorisation. The DMD-NBD model also allows calculation of category loyalty, via the category polarization statistic, for comparison with other studies, markets and categories.

Chapter Four

4.0 Results

Shopping seems to be a very personal-opinion dominant behaviour, but through analysing and sorting, it is found that there is a pattern of consumers' thought and behaviour. The behaviour reflects consumers' consideration. This chapter will present and describe the results analysing through SAS software and Microsoft Excel. The argument will be supported by the answers from interviews (transcripts of interviews are in the Appendix D) and other background information. Interviewees, as introduced in the last chapter, are Chinese students in the Otago University, and who are born around 1990s. The concept of brand management became popular in China when these 20s' adults were born. They are access to different types of media as well. Qiao et al. (2010) point that highly educated participants have a fairly high level of concern for safety of dairy products. Therefore, these interviewees' points of view should be very informative.

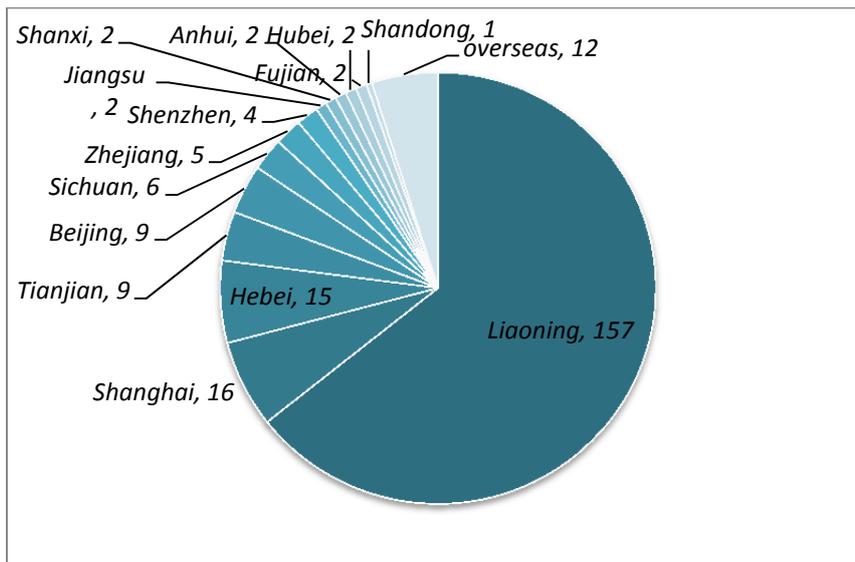
4.1 Survey Sample

The survey is completed by convenience and snowball sampling (Zikmund et al., 2007). A total of 270 questionnaires were collected, but 177 responses were fully completed for the analysis of brand salience and double jeopardy models. There are 244 participants achieved for demographics' analysis. The characteristics of the survey samples are as delivered below.

Place of residence (sorted by province)

Results are generalized across 12 first-tier cities and some second-tier and few third-tier cities in China, as shown in the pie chart below. There are 199 responses from the first-tier cities. Participants who live in Liaoning Province accounts for two thirds of the total number, as most of the convenience samples live in this area. According to the latest 2013 Chinese cities classification list (non-Hong Kong, Macao and Taiwan), there are totally 19 first-tier cities in China (Y. Zhang, 2013) (see Appendix E). Beijing and Shanghai are the conventional first-tier cities, but the purchasing power of other cities is inevitable. Cities of the participants are either municipalities, center cities in the region, provincial cities or coastal cities in economically developed areas (G. K. M. Wong & Yu, 2003).

Figure 4.1 Place of Residence



Gender

More than half of the respondents were female (59%). Women usually are the main buyers in the family (Shoham & Brencic, 2003), the same as this research. A larger majority of people in the survey chose women as the answers about who is the buyer of milk in your family.

Table 4.1 Gender

	Number	Percentage
male	100	0.410
female	144	0.590
total	244	1

Age

Table 4.2 Age

Year of birth	Number	Percentage
1990-1995	61	0.25
1980-1989	126	0.516393
1970-1979	34	0.139344
1960-1969	23	0.094262
total	244	1

The results obtained from the preliminary analysis of age are presented in Table 4.2. 75% of the participants were aged between 25 and 55 years. People around this age have stable income. Besides, most of them have their own families as well. Therefore, the research can be said that done among 244 households. The result will be reasonably representative of the market.

Income

The table below illustrates the monthly household income. As shown, the left of the table is the income of people who live by themselves, and the right side is on a family basis. According to the responses, the family usually is composed from 2 to 5 family members. The low-income and middle-income families accounts for the majority of the survey.

Table 4.3 Income (in RMB)

	Single		Family	
	<5,000	61	<10,000	77
	5,000~10000	14	10,000~20,000	46
	>10,000	7	20,000~30,000	9
			>30,000	6
Total		82		138

(The exchange rate between RMB and New Zealand dollars is approximately 1 versus 5)

Place of purchasing

From the table below we can see that the majority of people choose supermarket as the place of shopping milk. Convenience shops rank the second of place of purchasing. Contrary to expectations, online shops are just chosen by six times, which is almost negligible. However, online shops are the main distribution of purchasing foreign milk brands. In addition, there is only one person that gave the example of other places where they buy milk, which is the vegetable market.

Table 4.4 Place of Purchasing

	Supermarket	Convenience shops	Online shops	Others	Total
Single	74	17	3	3	97
Family	126	18	3	6	153
Total	200	35	6	9	250

Three most important factors versus attributes selected according to the brands

The table below provides two ranks obtained from the questionnaire. The left two columns are unprompted answers about “write down three most important factors when you are selecting milk”, and the right two columns are prompted attributes associated with each brand according to the amount in descending order. It is apparent from the table that most factors on the left unprompted proposed by prompted participants themselves are covered by the attributes the survey provided. Interestingly, the rank of factors consumers care about is a little bit different in order from the rank of prompted attributes. For example, most people regard quality as the most important element of milk products, but the attribute participants associated most with the domestic milk brands is famous. The factors similar to quality on the right side are trustable and nutritious, which only occupy the fourth and fifth positions. The possible interference of this is that firms emphasis too much on its reputation, not its quality. Therefore, the table below is very useful as a start point for understanding milk in consumers’ minds.

Table 4.5 Prompted and Unprompted Attributes

Answers by participants		Selected from the attributes	
Quality	89	Famous	666
Tasty	72	Convenient to buy	426
Brand	49	Packaging is convenient	353
Price	41	Nutritious	344
Shelf life	36	Trustable	340
Safety	25	Tasty	322
Nutrition	24	Attractive ads or packaging	293
Fresh	20	Enhance face as a gift	284
Reputation	22	Unpolluted	272
Package	15	Cheap	251
Source of milk	25	Fresh	249
Hygiene	12	Value-for-money	235
No additives	10	Is it a foreign brand?	102

4.2 Evaluation of Milk Brands in Consumers' Mind

As mentioned in the literature review chapter, all the figures or models below are generated from the SAS as the results of the NBD-Dirichlet model. The data was downloaded from Qualtrics into SAS statistics software. Rungie and Goodhardt (2004) and Stocchi (2014)'s papers clearly show how researchers can apply the Dirichlet model to provide benchmarks for the underlying patterns of repeat purchases of the brands. Jenni Romaniuk (2013) and Goodhardt et al. (1984) have shown the applicability of the model with regard to the analysis of brand performance measures, namely brand salience and double jeopardy. The results observed in the survey brand association measures are very close to the NBD-Dirichlet model estimated, although there are few evidences of brand deviations. The reasons for the deviations will be discussed in detail, following.

4.2.1 Domestic Brands

With regard to measuring brand salience, inputs of the model are the observed and predicted incidence and repeat rate for domestic brands and foreign brands separately.

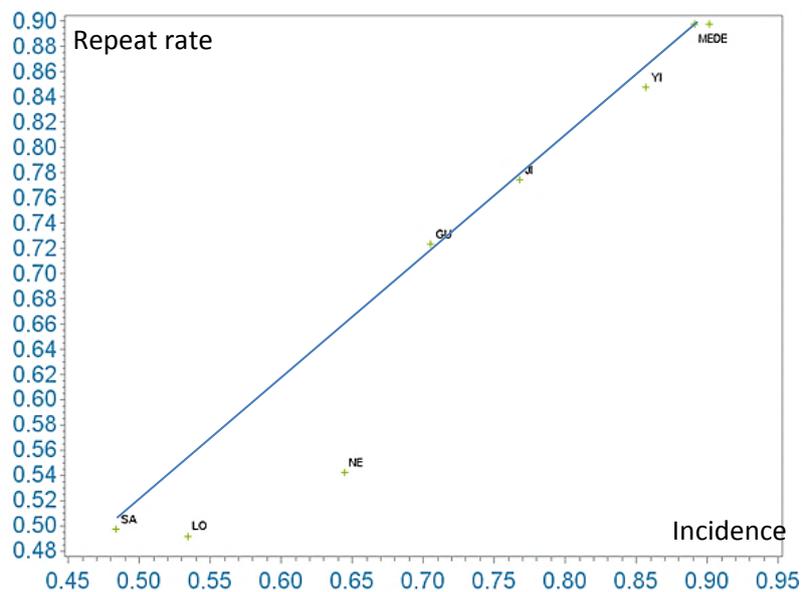
Observed Incidence versus Predicted Incidence

Figure 4.2 compares the observed incidence (percentage of people giving at least one brand association) with predicted incidence. From the data in figure, it is apparent that all brands are on the regression line except local brands and Nestlé. Both of their observed incidences are lower than predicted. The results indicate that local milk brands and Nestlé have fewer people associated at least one attribute. This result may be explained by the fact that local brands and Nestlé are in another category of mind. Nestlé is a foreign dairy brand, even though it has entered into the Chinese market for decades of years. Each local milk brand, needless to say, is known only in a certain region. In the mind, local brands, foreign brands, and the other domestic brands have different associative memory network. There are similarities between the result of this research and Jenni Romaniuk (2013)'s carbonated drinks. Diet coke and sugary coke are different in consumers' mind, so the predicted incidence is different from the observed. The reason is not explained in the Romaniuk's research, so this study offers an important insight into the differences even in one category. It is like people buy Nestlé and local brands should be in different situations.

Table 4.6 Short Label for Brands and Observed Incidence

Label	Sh_label	Observed Incidence
Mengniu	ME	0.898305
Yili	YI	0.847458
Deluxe	DE	0.898305
Jindian	JI	0.774011
Guangming	GU	0.723164
Sanyuan	SA	0.497175
Local	LO	0.491525
Nestlé	NE	0.542373

Figure 4.2 Observed Incidence versus Predicted Incidence



As for the first and second brand in the figure, namely Mengniu and Deluxe, almost 90 percent of subjects associated at least one attribute with them. It suggests that these two brands are managed really well in the market. Deluxe and Jindian are both positioned as high-ended brands, the time to market of Jindian is only one year behind the Deluxe, but the difference is apparent. The participants in the interviews mentioned more than once that they prefer Deluxe than Jindian.

“The package of Jindian is not better than Deluxe. But I heard from my teacher that the quality of Yili (which is the parent brand of Jindian) is better than Mengniu (parent brand of Deluxe). Maybe the ad is not better than Deluxe.”

“Not any milk is called Deluxe. This ad I also quite like. In my mind, I think Deluxe is more upscale than Jindian. And its value is higher than Jindian.”

Besides, the graph breaks the hypothesis before the data was collected, which is the markets of Deluxe and Jindian are different from their parent brands, Mengniu and Yili. People regard all of them the same, except local milk brands and Nestlé. The reason why Sanyuan is at the last position is that it focuses more on the market in Beijing. People live out of Beijing probably do not buy the brand often, so they could not associated the brand with many attributes in their memory. Therefore, for brand managers of Sanyuan, they should think about their brand awareness and distribution problem.

Observed Repeat Rate versus Predicted Repeat Rate

Local brands and Nestlé again show that they have a higher frequency of associations than estimates. The finding further supports the idea that these two brands are in another category of mind. Figure 4.4 and 4.5 compares provides two attributes which the local milk are on average most associated with. 62 percent and 38 percent, respectively, believe local milk is fresh and value-for money. The other brands perform more or less the same on these two attributes. Local milk brands and other brands on the regression line should be bought in different situations.

Table 4.7 Short Label for Brands and Observed Repeat Rate

Label	Sh_label	Observed-repeat rate
Mengniu	ME	4.805031
Yili	YI	4.386667
Deluxe	DE	5.006289
Jindian	JI	3.554745
Guangming	GU	3.078125
Sanyuan	SA	2.284091
Local	LO	3.022989
Nestlé	NE	4.25

Figure 4.3 Observed Repeat Rate versus Predicted Repeat Rate

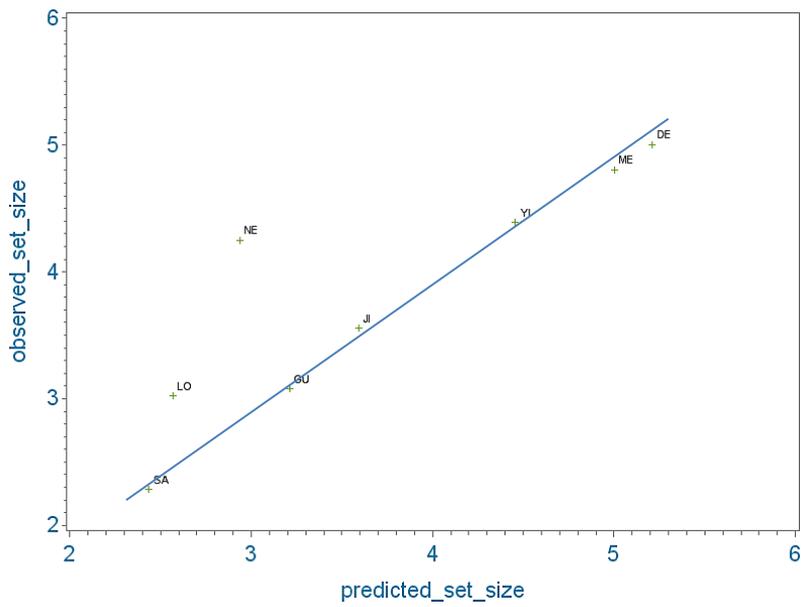


Figure 4.4 Percentage of the Associated Attribute ‘Fresh’

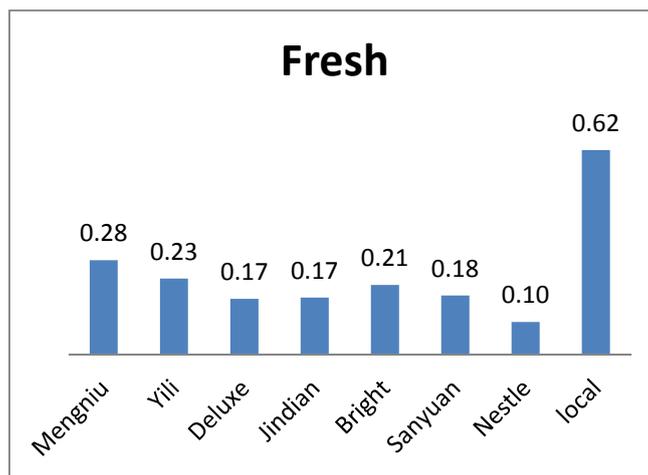
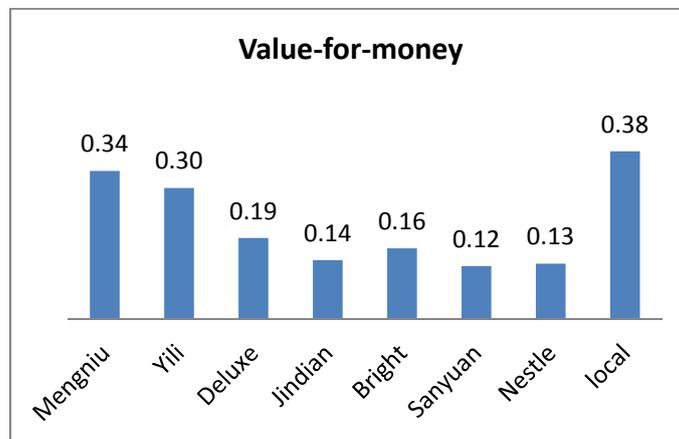


Figure 4.5 Percentage of the Associated Attribute ‘Value-for-Money’



For the participant NO.7, he lives with his grandparents together. His family bought Deluxe and a local milk brand together. The local milk is especially for his grandmother, as she has hypertension. The participant only drinks Deluxe at home, and he thinks the taste of local milk is bad. It illustrates the two brands has different attributes in their networks. The market of local brand and other big brands facing are partly different. Moreover, the second participant only believes in the local milk, so her family seldom buy other national brands for daily use. As she thought:

*“Foreign milk is also not trustable. During the process of making milk, there are problems”.
“Because of technical problem, the flavour of milk after processed is worse than Mengniu and Yili. But in consumers’ mind, the quality is better”.*

Besides, the more attributes brands are associated, the more easily these brands will be retrieved. Figure 4.3 explains why the Deluxe is mentioned by each interviewee that they have bought it before. With regard to Jindian, it is nearly 1.5 points lower than Deluxe. If the marketing activities are effective in conveying messages to potential customers afterwards, like Jindian, its score will grow by following the line. The reason that Nestlé has a higher repeat rate is because there is an attribute asked about “if this brand is a foreign brand”. Most participants did choose the attribute under Nestlé. This attribute can be removed during the analysis process. Except for this reason, Nestlé is still not in the same group of the domestic milk brands.

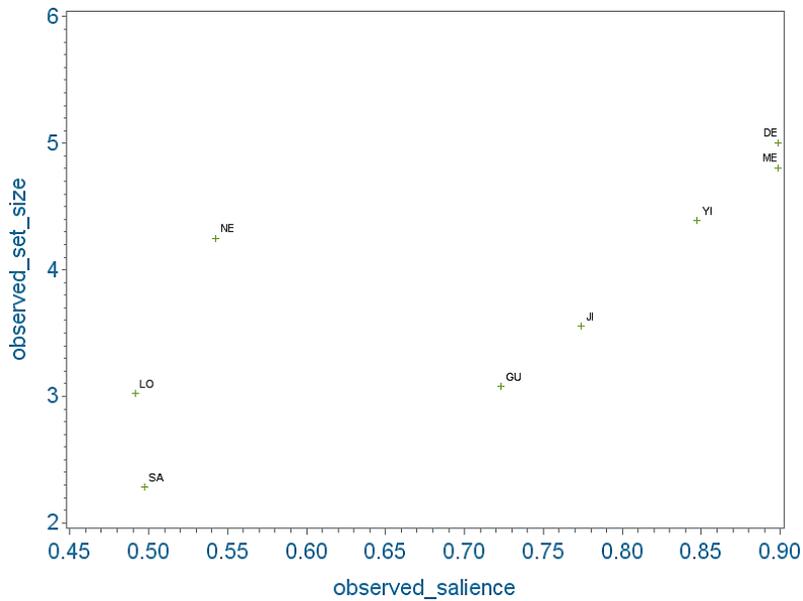
Observed Incidence versus Observed Repeat Rate

There is no doubt that the figure of brand salience is like this, after examining the incidence and repeat rate separately. Figure 4.6 have revealed the mental market share in the category of milk. It is likely a reflection of real market share. It would be interesting to compare the two markets, as many studies discussed the positive relationship between purchasing behaviour and brand associations (Jenni Romaniuk, 2013). In participants’ mind, Deluxe not only obtain the highest awareness among people, but also the most attributes. Mengniu is just a little bit behind Deluxe. The potential problem of these two brands could be the image of one easily affected by the other one.

Previous literatures only testify the applicability of NBD-Dirichlet model measuring brand performance, but the deviations open up a new angel of research to find out the reason. Since

Nestlé and local milk brands are in a different category, their brand managers should not compare their market performance with Deluxe and other brands. Also, local brands do not need to be influenced by the national milk brands, as people regard them distinguishably.

Figure 4.6 Observed Incidence versus Observed Repeat Rate



4.2.2 Foreign Brands

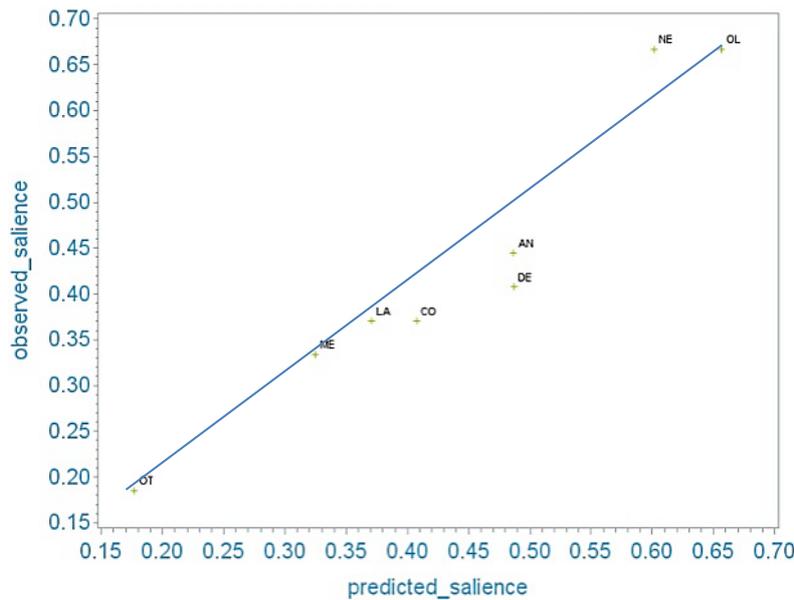
Observed Incidence vs Predicted Incidence

The results obtained from the SAS analysis for foreign milk brands are set out in Figure 4.7. The NBD-Dirichlet model does not fit perfectly, as there are not many people actually know about foreign brands. Of the 195 participants who responded to this question, 43 reported that they know about foreign brands. The table of attributes were filled by 27 participants. Only 19 participants can write down the brand’s name.

Figure 4.7 Short Label for Foreign Brands

Obs	sh_label	_LABEL_
1	DE	Devondale
2	OL	Oldenburger
3	CO	Country Goodness
4	ME	Meadow Fresh
5	AN	Anchor
6	LA	Lactel
7	NE	Nestlé
8	OT	Other

Figure 4.8 Observed Incidence vs Predicted Incidence



As shown in Figure 4.8, Nestlé is not surprisingly above the line, as its history in China is much longer than any other foreign brand. It is more well-known. Anchor, Devondale and Country Goodness are below the line. It indicates that these three brands have less consumers associated at least one attribute than predicted. However, Anchor actually officially entered into the Chinese market in 2013 (Anchor, n.d.). It has official website in Chinese, and Weibo account (similar with Twitter). The result does show Anchor has a problem in this market. There is an opportunity for Anchor to have the same degree of awareness as Nestlé in China. Brand managers of Anchor, Devondale and Country Goodness could reasonably improve brand awareness in this market without over-investing in communications.

“I think anchor is very famous. A lot of people mentioned about it, before, in China. It is more famous than Meadow Fresh.”

“I only know Anchor. I saw it on some websites before, and said it is a foreign brand, and it is good.”

More consumers should be surveyed in future studies to examine the familiarity of Anchor among Chinese consumers. Except for Anchor and Nestlé, there are no obvious promotional tools for the other foreign brands. Therefore, if they want to earn a part of the market share, these brands have to work on increasing their brand awareness.

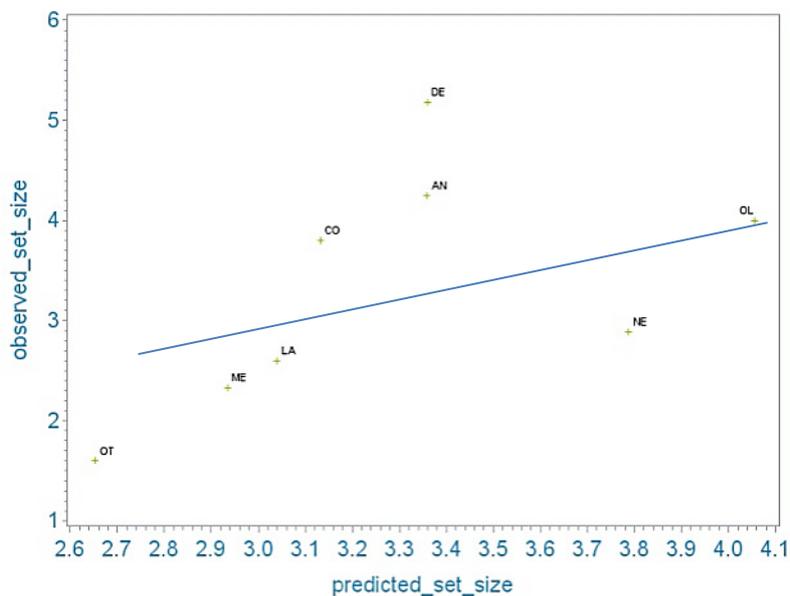
Observed Repeat Rate vs Predicted Repeat Rate

The figure below is more scattered and hard to summarize. Country Goodness, Anchor and Devondale are above the line, Oldenburger is on the line, but the other brands are below the line. We can see that although Country Goodness, Anchor and Devondale are less known, people who selected them selected more attributes than expected. One of the interviewee said:

“Because I like it (meaning Anchor), and I am on a diet. Skimmed milk, especially 99% defatted, there is not many brand have this kind of milk. In China, there is not much choice.”

If managing properly, Anchor will become the most competitive foreign brand in China. Surprisingly, Nestlé ranks the second on the last figure, but now it is below the line. Nestlé has a higher percentage of responses associated at least one attribute, but it is associated with less attributes. It is possible therefore that Nestlé has many different categories of products under its brand, like chocolate, coffee and soft drink. These products’ diffuse image could be a burden for people to retrieve the network of Nestlé’s milk.

Figure 4.9 Observed Repeat Rate vs Predicted Repeat Rate



Meadow fresh, Lactel and other foreign brands are below the line as well. These brands are not familiar among Chinese consumers, as they have not begun to manage their brands effectively in China. In the interviews, none of the respondents have bought or drunk Lactel before. Besides, there are no participants who associated Meadow Fresh with the attribute—cheap. It is apparent that price is an important factor effects consumers’ decision.

Observed Incidence vs Observed Repeat Rate

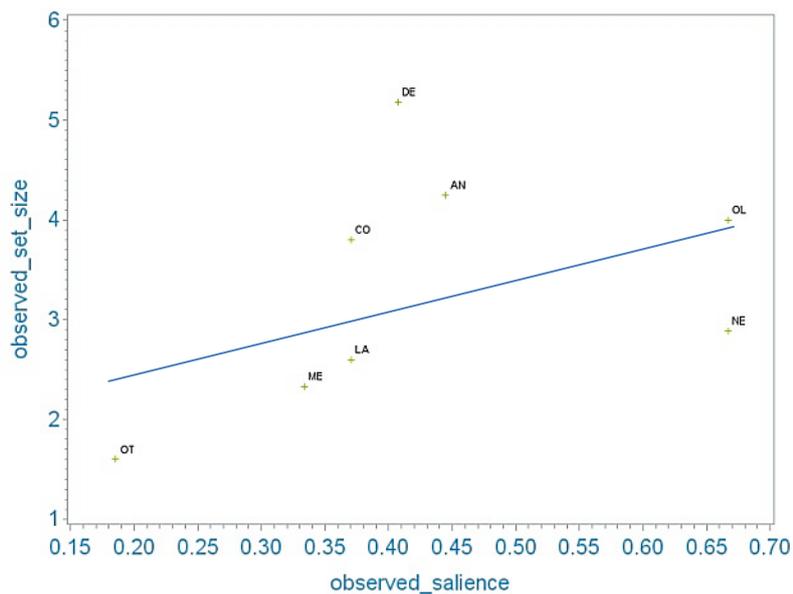
Figure 4.10 provides brand salience of all the foreign brands. Country Goodness, Anchor and Devondale perform well. Anchor and Country Goodness are New Zealand brands, and both are Fonterra’s sub-brands. Meadow Fresh is also a New Zealand brand. Devondale is an Australian brand. People have faith in these brands, which can be seen from the interviews. Oldenburger is only an average association set size.

“I don’t know any foreign brands, but I know New Zealand milk is good.”

“I only know Anchor. I saw it on some websites before, and said it is foreign brand, and it is good.”

“IL is a bit more than 10 RMB. Country Goodness is cheaper, and it is high quality and taste is not bad.”

Figure 4.10 Observed Incidence vs Observed Repeat Rate



Furthermore, Nestlé is in an embarrassing position. Possessing reputation, market, and loyalty customers, its image in people’s mind is different compared with the other foreign brands. In my opinion, consumers regard it as a domestic product but with a foreign brand. Due to the influence of Melamine Scandal (Wu, 2008) and other negative news as well (n.d., 2012), it is more polluted in this market than on other markets such as other New Zealand or Australia. The figures below are able to explain it clearly.

Figure 4.11 Percentage of Associated Attribute ‘Unpolluted’

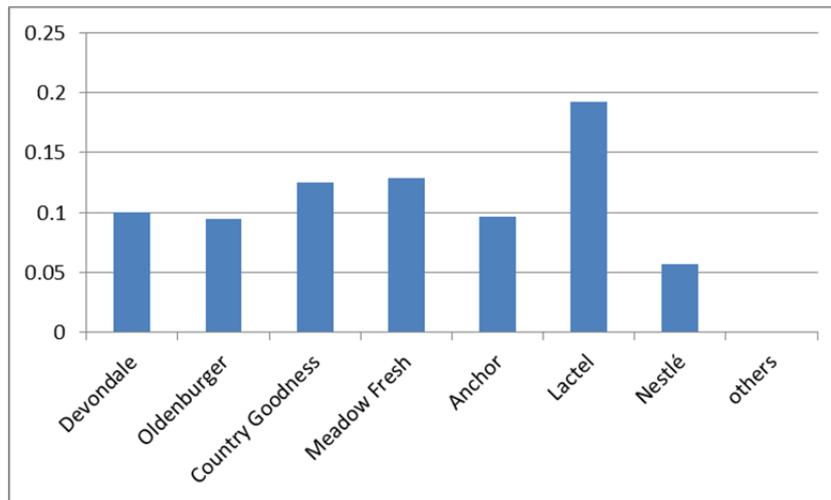
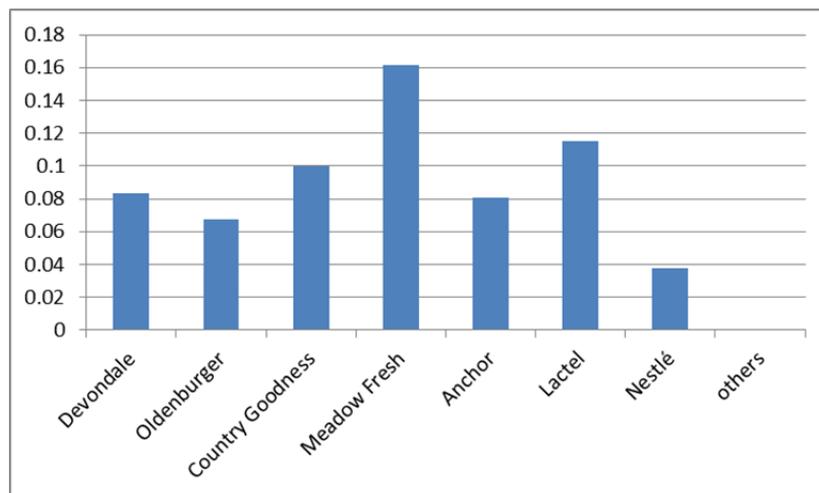


Figure 4.12 Percentage of Associated Attribute ‘Fresh’



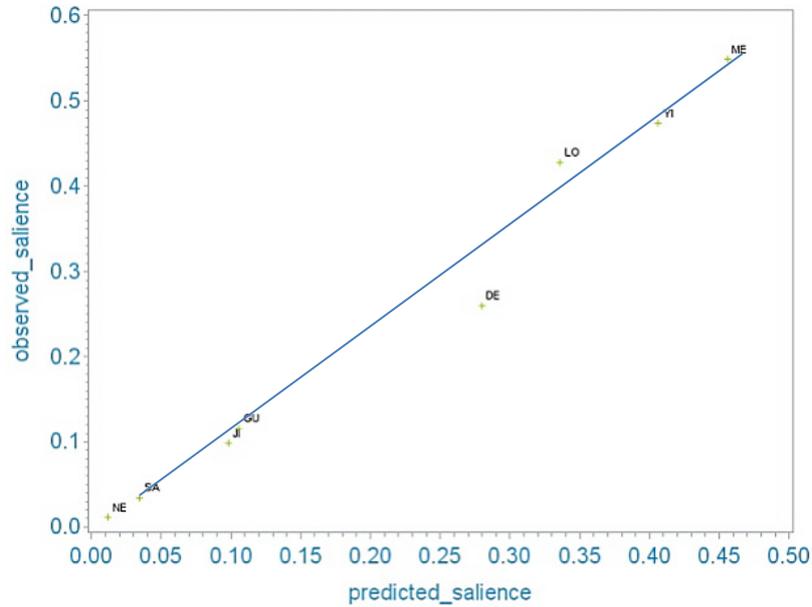
4.3 Evaluation of Milk Brands in Real Market

4.3.1 Observed Penetration vs Predicted Penetration

The results match the NBD-Dirichlet model. It shows the rank of different brands how many proportion of people bought per week. The ranks of Mengniu and Yili are not change from market share of mind to share of wallet. Over half of participants did buy Mengniu and Yili at least once weekly. The single most striking observation is Deluxe falling to the fourth

position. It should be the reason of price. Local brands are popular in the market share of wallet. There is seldom participant ever bought Nestlé and Sanyuan at least once.

Figure 4.13 Observed Penetration vs Predicted Penetration



4.3.2 Share of Volume versus Share of Wallet

Rank orders of brands by share of volume and share of wallet are exactly the same, except for local brands. The finding confirms that local brands are different from the others. The table indicates that the volume and monetary value of all the participants in the survey purchased and paid are distributed in the same rank. Therefore, the methodology demonstrates a high degree of external validity.

Table 4.8 Share of Volume versus Share of Wallet

	share of volume	share of wallet
Mengniu	1.076152026	1.735617328
Yili	0.96456965	1.545963717
Deluxe	0.731186915	0.954020732
Jindian	0.222543993	0.413792068
Guangming	0.211537398	0.379302
Sanyuan	0.098282892	0.1206905
Local	0.502512145	1.494260668
Nestle	0.03757325	0.045976

4.4 Important Parameters

There are some parameters in the Dirichlet model that carry the explicit meaning about purchase behaviour (Stocchi, 2014), which is very useful for comparison among different markets and categories of products. There are few studies in the area of brand equity that refer to these useful, readily available parameters. These are the parameters shape (γ) and phi (ϕ). Understanding them thoroughly will provide useful advices for practitioners.

Shape (γ): It indicates behavioural characteristics of a group of shoppers and the distribution of light and heavy purchasers (Stocchi, 2014). Lower γ values mean a larger proportion of heavy buyers or customer focus.

Phi (ϕ)/category polarization: is a transformation of the conventional S parameter, $1/(1+S)$, and measures the differences in buyers' choice probabilities (Stocchi, 2014). Hence, it implies the degree of brand switching and brand loyalty. The closer ϕ to 0, the lower loyalty of the buyers (Corsi, Overton, & Casini, 2014). When Φ equals to 1 it represents 100 percent loyalty. It offers a valuable competitive benchmark to evaluate the level of competition for retrieval in the market of the mind.

Table 4.9 Parameters

	Share of mind		Share of wallet	
	Domestic brands	Foreign brands	Domestic brands	
shape	2.9773	2.0404	2.2498	avg_pfolio_size
Cat_polarise	0.061688	0.22138	0.35368	1.93216

Surprisingly, the category polarization was found low both in the domestic milk market and foreign milk market in consumers' mind. Compared to 0.06 among the domestic brands, buyers of foreign milk market have a higher level of loyalty. It shows how tough competitions it is in the domestic market. In the real market, the category polarization is much higher than the market in mind. It suggests that the real market is less competitive than the market in mind. Buyers' choice is subject to price, distribution, or promotions in the shop. In addition, consumers who buy foreign brands tend to be heavier buyers than those purchasing the domestic brands, as seen from the shape parameters. The parameter of shape is lower than in mind, thus people tend to buy less than the amount they think in mind. The average portfolio size means buyers actually often switch between two brands.

Chapter Five

5.0 Discussion

The study aimed to diagnose brand management of the current milk market in China, from the perspective of consumers. The main contributions of this study presents that Chinese consumers are as loyal as other countries, even though the category is milk, with scandal contamination. Customers regard the quality of the products as primary considerations, other than price, although there is research linking Chinese consumers with being price sensitive (Qiao et al., 2010; Z. Wang et al., 2008). Due to the Milk Scandal and other problems of food safety in the category of milk, the milk category in China is likely associated with more and different attributes than in other countries, motivating this research. Practitioners need to understand the market in the buyers' mind. The main findings Chinese dairy companies and academics can take away from this research is as following.

5.1 Summary of Findings

The key academic contribution to the literature provides an exciting opportunity to advance the understanding of brand salience, and double jeopardy in the background of consumer based brand equity. By applying them through the NBD-Dirichlet model in the category of milk, it can compare both attitudinal and behavioral brand performance, solving the problem Jenni Romaniuk (2013) and Jenni Romaniuk and Nenycz-Thiel (2013) mentioned about the lack of the studies combining attitudinal and behavioral ways of measuring brand performance. As attitudes determine the behavior, it is more important to start research from consumers' mind. Double jeopardy is the supplement of brand salience. Moreover, this research provides the practicability of consumer based brand equity. From the perspective, understanding what they need, what aspect of product they most valued, and what the process of their thinking are the key for companies promoting the concept of brand in consumers' mind. This method is reasonably simple to operate, and deserves to be move broadly promoted into more industries and categories of products as a brand management tool. The results also supported the findings of J. Romaniuk and Sharp (2004), as a new way of looking into the relationship between brand perceptions and consumer behavior.

Furthermore, this present study identifies the complexity and variability of the Chinese milk category. The market for milk associations in people's mind is more competitive than the

market for milk consumption. Mengniu and Yili steadily occupy the leading positions in the industry. Guangming is trying to narrow the gap between it and Mengniu and Yili. Sanyuan actually is struggling in the market. All the local brands together account for a part of market share that cannot be overlooked. Big brands are trying to use price reduction and promotion to attract consumers, which decreases their profit margins. It may be a possible explanation for so many food safety issues happened among low-share milk. In short, starting from a new viewpoint, it helps the managers learn about the market. It could be a good reference for academics and practitioners to get the basic knowledge about a market. On the basis of this research, further study could research this methodology in more depth.

In addition, this research fills a gap no similar research has done before in China. The particularities of consumers, products and background of market are not problems for the application of this method.

5.2 Answering the Sub-Questions Proposed in Chapter One

5.2.1 Have People and the Dairy Company Recovered from the Milk Scandal?

After the crisis of confidence in the dairy industry, it is wondered if consumers lost trust for Chinese milk brands, and have people recovered from the crisis. The study found that the characteristics of milk that people care more are quality, taste and trust. The criteria of choosing among brands have changed from concerning money to concerning safety. Just like the interviewees mentioned: “My family thought there was no problem of milk, before the milk scandal”; “Safe is important. We have no other choice”. After six years of the scandal, it seems that all the big dairy brands have recovered their brands’ images in people’s mind. Even though Mengniu, was the company most affected by the scandal and following negative news, it stays the most salient brand in participants’ mind. Mengniu do recover from the scandal, and have made the right strategies. The scandal did not stop people purchasing domestic milk brands. However, the Chinese now are very sensitive about any food safety issues, and the image companies have rebuilt is not solid. The association between the brand and attributes related with quality has to be strengthened by the company. Advertisements cannot satisfy the Chinese consumers now, what they need to know about are the production

processes. Word-of-mouth may play more important role in making the brand salient in buyers' mind.

5.2.2 How Many Different Categories about Milk in Consumers' Mind?

Due to the complexity of different types of milk in china, as mentioned in the first chapter, it is guessed that Deluxe and Jindian is in a different category of mind, compared with the others. The result shows people regard all the domestic brands same in their mind, except local brands. It is apparent that Deluxe is the most salient brand. It seems the management of Deluxe really works well in people's mind. Quality is the key thing for Deluxe getting success. The same as local brands, people believe in the local company. It is cheap, but less tasty, less famous, which are all nearly completely different from the other national domestic brands. As a high-ended brand as well, Jindian is ranked well behind Deluxe. Consumers mentioned the advertisements of Deluxe are impressive, and its taste is richer. It explains why more participants associated Deluxe with the attribute of enhancing face as a gift. However, people are confused about the meaning behind "Jindian", which sounds not like a dairy name. In terms of the advice for Jindian, it could add a new attribute into its association network, such as 'good for the old or the sick'. Generally, it also suggests that making the attribute of quality most salient in shoppers' mind will assist the brand having higher potential to be purchased.

5.2.3 Suggestions for Foreign Brands Management

The main focusing product for foreign dairy companies now is not liquid milk studied here, but milk powder. Price, distribution and shelf life are the main attributes for foreign milk brands are lack of. Foreign brands sold in China are all long life coffin packages, so some people are concerned about the too long a shelf life, and they are not available in all supermarkets. Only Fonterra (the parent company of Anchor and Country Goodness) has built farms in China, which is the only milk base overseas for Fonterra (n.d., 2014a). Fonterra has great advantages to compete with the other dairy companies. However, Nestle realized the necessity of building farms in China in 2014 (Z. Zhang, 2014), consistent with recent law changes in China (see Chapter One). After the farms are put into use, it will be a greater threat for the domestic brands. With regard to the dairy companies who have not built farms in China, it will be hard to manage their profits and brands. From these results, there is only a small share of consumers purchase foreign brands milk regularly, so the priority of foreign

milk brands is expanding its awareness. Conversely, some domestic brands, like Guangming and Yili have invested and purchased farms in New Zealand, in order to obtain the best source of milk. Thus, consumers will make connections between the brands and a relatively unpolluted country, fresh air and developed production skills and high level of traceability

5.3 Managerial Recommendations

The findings presented in this research have provided strong support for a combined model of brand salience and double jeopardy to evaluate milk brands at attitudinal and behavioral level. Using theoretical values from the NBD-Dirichlet model as a benchmark, brand managers are able to audit the performance of established brands, analyze market partitioning, assess new brand, and evaluate dynamic situations.

The results of this research have substantive implications for marketing management. It elaborates in detail the current situation of Chinese milk market, which could be a very comprehensive reference for academics and practitioners to understand the market. Our discovery suggests that this procedure can be used to examine current brands imagery, as well as past brand purchase behavior. On the basis of establishing a wide variety of attributes of the brand, the next step is developing a strong, positive and distinguished association. Differentiation from competitors is another task for brand managers. Emphasizing one shared aspect or a different aspect is likely to make the brand stand out from the others. The success of Deluxe is partly due to the differentiation of its product positioning, as the first luxury milk brand.

Although brand salience is usually used in the low involvement purchase process, this study offers a new insight into the process beyond the initial scope. In this Chinese context, milk is not a typical low involvement purchase category, so this method can be tested into more different categories in the high involvement purchase process.

Chapter Six

6.0 Limitations and Recommendations for Future Research

Although this study provides milk market in China with valuable information about brand management, there were a couple of limitations.

A key limitation of this research is the sampling. Firstly, due to the practical constraints, this paper cannot provide information across all the areas in China. Especially there are not enough answers for foreign milk brands. Replication of the study would be recommended if they can employ more responses in different areas, or a specific area. Also, comparing the results between different years is helpful to examine the dynamics of milk market in China. Another potential but less important problem is that the time of participants answering in the survey are not limited. Previous studies that use focus group method all control the time of participants retrieving brands/attributes. By using online survey, this is not controllable.

All the research was designed and conducted by myself, although under supervision of the supervisor, there is potential researcher confirmation bias of the research being involved. Such as, the attributes are not tested if they are all “valuable”. “If it is a foreign brand” seems did not help too much for the evaluation. Besides, evaluative and descriptive attributes (Jenni Romaniuk & Byron Sharp, 2003) may need to be asked separately. Future research should also test the effect of cues in different situations. Attributes could have different influences when consumers buy milk for their family, or for the old, or as a gift. Consumers are becoming more concerned about their health, so calcium supplementation, defatted, and other unprompted functional nutritious issues arising in this study deserve further research.

This thesis does not engage with the influence of different promotion tools on the network in memory. TV advertisements, websites, street advertising and so on should affect decisions differently. From Olympics games, entertainment shows to films’ advertisements embedded, dairy companies have spent millions on sponsorships.

Further research could also investigate the degree of relationship between brands and different attributes. For example, quality in the questionnaire have been mentioned the most, so it will be interesting to know how much influence of this criterion on selecting brand. In other words, the strength of association between the brand and the attribute is worthy to be researched more in depth. The domestic milk brands are called look-like brands (Andrew S.C.

Ehrenberg et al., 1997). Brands usually share attributes with each other. Their marketing communication activities are similar and sometimes one company will follow the other one's strategy. Research questions that could be asked include choosing from 1 to 5 about two similar brands, like deluxe and Jindian, on the same set of attributes used in the survey.

The importance of trust among Chinese consumers is always a popular topic in food industry. *"We did not buy these brands after the melamine scandal"; "I think it is good to buy assured products. It does not matter to pay more money"*. The Melamine Scandal still deeply influences the Chinese, which makes consumers become more cautious on making a choice. It suggests investigating how trust and price respectively influence in a decision among brands for Chinese consumers in the milk category.

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Appendices

All the appendices are in the DVD-ROM

Appendix A: News about the Melamine Scandal

Appendix B: Survey Questionnaire (also printed following)

Appendix C: Consent Form and Information Sheet (also printed following)

Appendix D: Interview Transcripts

Appendix E: The Classification of Chinese Cities

Appendix A: News about the Melamine Scandal

1 BBC (31 October 2008) Chinese melamine scandal widens

<http://news.bbc.co.uk/2/hi/asia-pacific/7701477.stm>

2The Telegraph by Richard Spencer (22 January 2009) Two sentenced to death over China melamine milk scandal

<http://www.telegraph.co.uk/news/worldnews/asia/china/4315627/Two-sentenced-to-death-over-China-melamine-milk-scandal.html>

3 U.S. NEWS by Paul Mooney (9 October, 2008) The Story Behind China's Tainted Milk Scandal

<http://www.usnews.com/news/world/articles/2008/10/09/the-story-behind-chinas-tainted-milk-scandal>

4The Guardian by Tania Branigan (22 January 2009) China to execute two over poisoned baby milk scandal

<http://www.theguardian.com/world/2009/jan/22/china-baby-milk-scandal-death-sentence>

5 The New Zealand Herald (10 October, 2008)

Fonterra donates to Chinese charity after melamine scandal

http://www.nzherald.co.nz/business/news/article.cfm?c_id=3&objectid=10536840

6 NBC news (22 January, 2009) 2 face execution over china poison milk scandal

http://www.nbcnews.com/id/28787126/ns/world_news-asia_pacific/t/face-execution-over-china-poison-milk-scandal/#.VIbGGvmSyX0

7China Daily (23 August, 2010) Six arrested in melamine-tainted milk scandal

http://www.chinadaily.com.cn/china/2010-08/23/content_11186225.htm

8CBC new (16 November, 2008) More child deaths linked to China's melamine scandal

<http://www.cbc.ca/news/world/more-child-deaths-linked-to-china-s-melamine-scandal-1.757828>

Appendix B: Survey Questionnaire

English ▼

Default Question Block

参与者告知信息文件

[参与者告知信息文件](#)

CONSENT FORM FOR PARTICIPANTS

I have read the Information Sheet concerning this project and understand what it is about. All my questions have been answered to my satisfaction. I understand that I am free to request further information at any stage.

I know that:-

1. My participation in the project is entirely voluntary;
2. I am free to withdraw from the project at any time without any disadvantage;
3. Personal identifying information, like the city where I live, will be destroyed at the conclusion of the project but any raw data on which the results of the project depend will be retained in secure storage for at least five years;
4. The results of the project may be published and will be available in the University of Otago Library (Dunedin, New Zealand) but every attempt will be made to preserve my anonymity.

I agree to take part in this project.

Have you bought (by yourself/with others) milk more than three times in this year?

- Yes
 No

Have you ever cared about milk brands when you buy or drink milk?

- Yes
 No

What year were you born?

Gender

- Male
- Female

Which city are you living?

Do you live by yourself or with families?

- I live by myself (including live with flatmates).
- I live with families.

Block 1

What is your income?

- below 5,000Yuan
- 5,000Yuan to 10,000Yuan
- above 10,000Yuan

How often do you buy milk?

- Less than Once a Month
- Once a Month
- 2-3 Times a Month
- Once a Week
- 2-3 Times a Week
- Daily

How much do you usually spend for each time? You can type the amount out or choose from one of the options.

- I prefer to type the amount out.

- 10 to 20 Yuan
- 20 to 30 Yuan
-

- 30 to 40 Yuan
- 40 to 50 Yuan
- above 50 Yuan

Where do you usually buy milk? (you can choose more than one choice)

- supermarket
- convenience shops
- online shops
- others

Block 2

How many people in your family?

How many people in your family often drink milk?

Do you live with the old together (over 65)?

- Yes
- No

What is your household income?

- below 10,000 Yuan
- between 10,000 to 20,000 Yuan
- between 20,000 to 30,000 Yuan
- above 30,000 Yuan

Who usually is the buyer of milk in your family?

How often does your family buy milk?

- Less than Once a Month
- Once a Month
- 2-3 Times a Month
- Once a Week
- 2-3 Times a Week
- Daily

How much does your family usually spend for each time? You can type the amount out or choose from one of the options.

- I prefer to type the amount out.
- 10 to 20 Yuan
- 20 to 30 Yuan
- 30 to 40 Yuan
- 40 to 50 Yuan
- 50 to 60 Yuan
- 60 to 70 Yuan
- 70 to 80 Yuan
- 80 to 90 Yuan
- above 90 Yuan

Where does your family usually buy milk? (you can choose more than one choice)

- supermarket
- convenience shops
- online shops
- others

Block 3

As for the category of milk, can you write down the most important three factors when you are selecting milk?

According to frequency, can you list at least two brands of milk you usually buy? (eg. Mengniu, Yili, Deluxe, Jindian, Guangming, etc.) If you remember the details (eg. flavour, fat content, or weight) as well, please write them together.

Brand A Brand B Brand C Brand D **brand A**

What is the reason for you buying \${q://QID29/ChoiceTextEntryValue/1} more often?

In what situation do you buy \${q://QID29/ChoiceTextEntryValue/1}? (you can choose more than one choice)

- self drinking
- baking
- as a gift for the old
- as a gift for the sick
- others

How often is \${q://QID29/ChoiceTextEntryValue/1} typically available and in stock when you go to buy milk?

- always available
- not available about 1% of the time
- not available about 20% of the time
- not available about 40% of the time
- available about half the time
- not available more than 50% of the time

Which package of \${q://QID29/ChoiceTextEntryValue/1} do you usually buy? (If the brand only have only one package, choose that one which fits the brand.)

- fresh milk/raw milk (stored chilled for 24hours to 36hours)
- pasteurized milk (stored chilled for 7 days to 15 days)
- ultra-high temperature (UHT) milk (shelf life from 30days to 45days, soft bag or tetra pillow)
- ultra-high temperature (UHT) milk (shelf life from 2 months to 12 months, tetra brik)

Do you buy single package or multiple package?

- single package
- multiple package

How many packages do you usually buy for each time? (eg. two packages or one box)

How much did you spend for one week on average $\{q://QID29/ChoiceTextEntryValue/1\}$? You can type the amount out or choose from one of the options.

- I prefer to type the amount out.
- 10~20 Yuan
- 20~30 Yuan
- 30~40 Yuan
- 40~50 Yuan
- above 50 Yuan

As for $\{q://QID29/ChoiceTextEntryValue/1\}$, are you willing to pay extra 10% to buy it?

- Yes
- No

brand B

What elements of $\{q://QID29/ChoiceTextEntryValue/2\}$ attract you to buy?

In what situation do you buy $\{q://QID29/ChoiceTextEntryValue/2\}$? (you can choose more than one choice)

- self drinking
- baking
- as a gift for the old
- as a gift for the sick
- others

How often is \${q://QID29/ChoiceTextEntryValue/2} typically available and in stock when you go to buy milk?

- always available
- not available about 1% of the time
- not available about 20% of the time
- not available about 40% of the time
- available about half the time
- not available more than 50% of the time

Which package of \${q://QID29/ChoiceTextEntryValue/2} do you usually buy? (If the brand only have only one package, choose that one which fits the brand.)

- fresh milk/raw milk (stored chilled for 24hours to 36hours)
- pasteurized milk (stored chilled for 7 days to 15 days)
- ultra-high temperature (UHT) milk (shelf life from 30days to 45days,soft bag or tetra pillow)
- ultra-high temperature (UHT) milk (shelf life from 2 months to 12 months, tetra brik)

Do you usually buy single package or multi-package of \${q://QID29/ChoiceTextEntryValue/2}?

- single package
- multiple package

How many packages of \${q://QID29/ChoiceTextEntryValue/2} do you buy once? (eg. two packages or one box)

How much did you spend for \${q://QID29/ChoiceTextEntryValue/2} in one week on average? You can type the amount out or choose one of the options.

- I prefer to type the amount out.
- 10~20 Yuan
- 20~30 Yuan
- 30~40 Yuan
- 40~50 Yuan
- above 50 Yuan

brand C

What elements of \${q://QID29/ChoiceTextEntryValue/3} attract you to buy?

What elements of \${q://QID29/ChoiceTextEntryValue/3} do you dislike? (If there is no element, you don not need to answer)

How often is \${q://QID29/ChoiceTextEntryValue/3} typically available and in stock when you go to buy milk?

- always available
- not available about 1% of the time
- not available about 20% of the time
- not available about 40% of the time
- available about half the time
- not available more than 50% of the time

In what situation do you buy \${q://QID29/ChoiceTextEntryValue/3}? (you can choose more than one choice)

- self-drinking
- baking
- as a gift for the old
- as a gift for the sick
- others

Which package of \${q://QID29/ChoiceTextEntryValue/3} do you usually buy? (If the brand only have one specific package, choose that one which fits the brand.)

- fresh milk/raw milk (stored chilled for 24hours to 36hours)
- pasteurized milk (stored chilled for 7 days to 15 days)
- ultra-high temperature (UHT) milk (shelf life from 30days to 45days, soft bag or tetra pillow)
- ultra-high temperature (UHT) milk (shelf life from 2 months to 12 months, tetra brik)

Do you usually buy single package or multiple package of \${q://QID29/ChoiceTextEntryValue/3}?

- single package
- multiple package

How many packages of $\${q://QID29/ChoiceTextEntryValue/3}$ do you buy once? (eg. two packages or one box)

How much did you spend on $\${q://QID29/ChoiceTextEntryValue/3}$ in one week on average? You can type the amount out or choose from one of the options.

- I prefer to type the amount out
- 10~20 Yuan
- 20~30 Yuan
- 30~40 Yuan
- 40~50 Yuan
- above 50 Yuan

brand D

What elements of $\${q://QID29/ChoiceTextEntryValue/4}$ do you like?

What elements of $\${q://QID29/ChoiceTextEntryValue/4}$ do you dislike?

How often is $\${q://QID29/ChoiceTextEntryValue/4}$ typically available and in stock when you go to buy milk?

- always available
- not available about 1% of the time
- not available about 20% of the time
- not available about 40% of the time
- available about half the time
- not available more than 50% of the time

Which package of \${q://QID29/ChoiceTextEntryValue/4} do you usually buy? (If the brand only have one specific package, choose that one which fits the brand.)

- fresh milk/raw milk (stored chilled for 24hours to 36hours)
- pasteurized milk (stored chilled for 7 days to 15 days)
- ultra-high temperature (UHT) milk (shelf life from 30days to 45days, soft bag or tetra pillow)
- ultra-high temperature (UHT) milk (shelf life from 2 months to 12 months, tetra brik)

Do you usually buy single package or multiple package of this brand?

- single package
- multiple package

How many packages do you usually buy? (eg. two packages or one box)

How much did you spend on \${q://QID29/ChoiceTextEntryValue/4} in one week on average? You can type the amount out or choose from one of the options.

- I prefer to type them out.
- 10~20 Yuan
- 20~30 Yuan
- 30~40 Yuan
- 40~50 Yuan
- above 50 Yuan

Block 8

Do you know how many units does one box of Deluxe/Jindian have?

- 8
- 10
- 12
- 14
- 16
- 18
- I don not know.

Do you know any foreign milk brands? If you know, please write down its name.

Yes

No

How do you know this or these foreign brands? (you can choose more than one choice)

word-of-mouth

websites

supermakets

magazines

others

For each of the words or phrases in the left column below, **please answer along the row from left to right**. Please choose the brand(s) which you think is (are) associated with the words on the left. You can choose more than one, as many as you think fit. If you are not sure what the brands look like, you can press the forward button to check their images.

	Mengniu	Yili	Deluxe	Jindian	Guangming	Sanyuan	Nestlé	local brand
famous	<input type="checkbox"/>							
cheap	<input type="checkbox"/>							
tasty	<input type="checkbox"/>							
fresh	<input type="checkbox"/>							
unpolluted	<input type="checkbox"/>							
nutritious	<input type="checkbox"/>							
trustable	<input type="checkbox"/>							
convenient to buy	<input type="checkbox"/>							
attractive advertisements or packaging	<input type="checkbox"/>							
value-for-money	<input type="checkbox"/>							
packaging is convenient for me	<input type="checkbox"/>							
is it a brand than can enhance face as a gift?	<input type="checkbox"/>							
do you regard it as a foreign brand?	<input type="checkbox"/>							

If you choose local brand, please write down the name of this brand.

Here are some of the main domestic milk brands in China. It is used for the previous two questions.



伊利（包括所有包装，例如：软袋/纸袋/纸盒等）蒙牛（包括所有包装）特仑苏（包含所有口味）金典（包含所有口



辉山（包括所有包装） 完达山（包括所有包装）

光明（包括各种包装）

For each of the words or phrases in the left column below, please answer along the row from left to right. Please choose the brand(s) which you think is (are) associated with the words on the left. You can choose more than one, as many as you think fit. If you are not sure what is the name of the foreign brand, you can press the forward button to check their images.

	Devondale	Oldenburger	Country Goodness	Meadow Fresh	Anchor	Lactel	Nestlé	others
famous	<input type="checkbox"/>							
cheap	<input type="checkbox"/>							
tasty	<input type="checkbox"/>							
fresh	<input type="checkbox"/>							
unpolluted	<input type="checkbox"/>							
nutritious	<input type="checkbox"/>							
trustable	<input type="checkbox"/>							
convenient to buy	<input type="checkbox"/>							
attractive advertisements or packaging	<input type="checkbox"/>							
value-for-money	<input type="checkbox"/>							
is it a brand than can enhance face as a gift?	<input type="checkbox"/>							

If you chose others for the previous question, please write down the brand's name.

Here are some foreign milk pictures. It is offered for the last question, if you have ever drank or bought these brands, but cannot remember its name.



德运



欧德宝



田园



纽麦福



安佳



Were there any parts of this questionnaire that you found difficult to understand or answer? If so, please tell us about it, with much detail as possible here.

Would you like a English copy of my results?

- Yes
- No

Thank you for taking part in this study. We have everything we need now. Bye.

Appendix C: Consent Form and Information Sheet



TU26
23/05/14

Form Updated: November 2013

**UNIVERSITY OF OTAGO HUMAN ETHICS COMMITTEE
APPLICATION FORM: CATEGORY B**

(Departmental Approval)

Please ensure you are using the latest application form available from:
<http://www.otago.ac.nz/administration/committees/otago000864.html>

1. **University of Otago staff member responsible for project:**
Surname First Name Title (Mr/Ms/Mrs/Dr/Assoc. Prof./Prof.)
Mather Damien Dr

2. **Department/School:**
Marketing Department

3. **Contact details of staff member responsible (always include your email address):**
damien.mather@otago.ac.nz

4. **Title of project:**

The evaluation of milk brands in consumer minds in Chinese market

5. **Indicate type of project and names of other investigators and students:**

Staff Research Names

Student Research Names

Level of Study (e.g. PhD, Masters, Hons)

External Research/ Names

Collaboration
Institute/Company

6. When will recruitment and data collection commence?

After the ethics form is approved, I will start to collect data.

When will data collection be completed?

The data collection will be completed before the end of June.

7. Brief description in lay terms of the aim of the project, and outline of the research questions that will be answered (approx. 200 words):

The aim of the project is to know which milk brands in Chinese market are managed well, and which aspects can be improved through my research. The research is mainly in the area of brand management, especially related to consumer based brand equity. As for brand management, if we can find associations that are commonly retrieved in the mind during the process of purchasing, these associations can be added or strengthened for that brand. Therefore, the brand will have a higher probability to be chosen, and the market share of brand will definitely be increased.

Questions will be asked like: Which brand do you usually buy; If you have never bought milk, which brands are you aware of; How often do you buy milk; How much did you spend on milk usually per week; Where do you usually buy milk products; Please rank milk brands depend on your purchase frequency and preference and so on.

8. Brief description of the method.

Because the target of my research is the Chinese market, I will have individual interviews with Chinese consumers. There will be about 10 participants, and each interview will last less than 30 minutes. I know many Chinese students in the campus, and they are also milk consumers. My interviewees are Chinese students in the university, and their age is usually around 20. Usually they are my friends, so it makes easier to get in touch.

I will not be collecting any data that can be used to identify individual interviewees, although I will collect some basic demographic data that can be linked to milk purchasing (such as gender, age, family size, and region of China within which the family lives).

Reporting Sheet for use ONLY for proposals considered at departmental level

9. **Disclose and discuss any potential problems:** (For example: medical/legal problems, issues with disclosure, conflict of interest, safety of the researcher, etc)

I think there will not be any potential problems.

*Applicant's Signature: 

Name (please print): DAMIEN MATHER

Date: 16/5/14

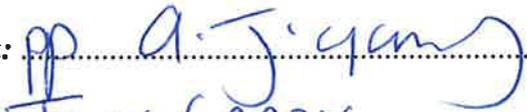
*The signatory should be the staff member detailed at Question 1.

ACTION TAKEN

Approved by HOD

Approved by Departmental Ethics Committee

Referred to UO Human Ethics Committee

Signature of **Head of Department: 

Name of HOD (please print): TONY GARRY

Date: 26/5/14

**Where the Head of Department is also the Applicant, then an appropriate senior staff member must sign on behalf of the Department or School.

Departmental approval: *I have read this application and believe it to be valid research and ethically sound. I approve the research design. The research proposed in this application is compatible with the University of Otago policies and I give my approval and consent for the application to be forwarded to the University of Otago Human Ethics Committee (to be reported to the next meeting).*

IMPORTANT NOTE: As soon as this proposal has been considered and approved at departmental level, the completed form, together with copies of any Information Sheet, Consent Form, recruitment advertisement for participants, and survey or questionnaire should be forwarded to the Manager, Academic Committees or the Academic Committees Administrator, Academic Committees, Rooms G22, G23 or G24, Ground Floor, Clocktower Building, or scanned and emailed to either gary.witte@otago.ac.nz or jane.hinkley@otago.ac.nz

[Reference Number:]

[Date]



The Evaluation of Milk Brands in Consumer Minds in Chinese Market
INFORMATION SHEET FOR
PARTICIPANTS or PARENTS / GUARDIANS ETC.

Thank you for showing an interest in this project. Please read this information sheet carefully before deciding whether or not to participate. If you decide to participate we thank you. If you decide not to take part there will be no disadvantage to you and we thank you for considering our request.

What is the Aim of the Project?

This project is being undertaken as part of the requirements for Wenwei Sai's Master of Business Degree. The aim of the project is to know which milk brands (including domestic and international brands) in Chinese market are managed well, and which aspects can be improved through my research.

What Types of Participants are being sought?

There will be several participants involved in my interviews. Participants, who are Chinese, and once bought milk, are eligible for this research. For most of the participants, we are friends, and we have known each other for a period of time. In terms of the benefits as participants, you can get a copy of my final research, if you want. Besides, after researching and reading my report, you may think more, and be more informed about, your choices when you buy milk again.

What will Participants be asked to do?

You will be asked to answer approximately 15 questions during 20 to 30 minutes. The questions are very easy, and you just need to remember which brand of milk you have bought, and which brand you prefer to buy and why. If more questions have to be asked after initial interviews, I might have to meet and ask you again.

Reporting Sheet for use ONLY for proposals considered at departmental level

Please be aware that you may decide not to take part in the project without any disadvantage to yourself

What Data or Information will be collected and what use will be made of it?

- *What raw data or information will be collected?*

You will be audio taped during the whole interview. The tapes will be transcribed, in order to summarize the common knowledge among all the interviewees. Personal information, like age, how many people in your family and how much you spent on dairy will be asked. The purpose of doing interviews is to enable the design of a more valid questionnaire for a subsequent quantitative phase of this research programme.

- *Who will have access to the data or information?*

My supervisor and I will have access to the data.

- *How will data or information be securely managed, stored and destroyed?*

The data collected will be securely stored in my laptop that only my supervisor and I will be able to gain access to it. Data obtained as a result of the research will be retained for 5 years in secure storage. Any personal information held on the participants such as contact details and audio or video tapes will be destroyed at the completion of the research even though the summary data derived from the research will, in most cases, be kept for much longer or possibly indefinitely.

- *What data or information will be reflected in the completed research?*

The results of the project may be published and will be available in the University of Otago Library (Dunedin, New Zealand) but every attempt will be made to preserve your anonymity.

- *Will the participants have the opportunity to correct or withdraw the data/information?*

Participants will have the opportunity to correct or withdraw the data or information before the end of June.

- This project involves an open-questioning technique. The general line of questioning includes the evaluation of milk brands in consumer minds in Chinese market. The precise nature of the questions which will be asked have not been determined in advance, but will depend on the way in which the interview develops. Consequently, although the Department of Marketing is aware of the general areas to be explored in the interview, the Committee has not been able to review the precise questions to be used.
- In the event that the line of questioning does develop in such a way that you feel hesitant or uncomfortable you are reminded of your right to decline to answer any particular question(s).

Can Participants change their mind and withdraw from the project?

You may withdraw from participation in the project before the end of June and without any disadvantage to yourself.

What if Participants have any Questions?

If you have any questions about our project, either now or in the future, please feel free to contact either:

Name of Student Researcher Wenwei Sai and

Name of Supervisor Damien Mather

Department of Management

Department of Marketing

University Telephone Number: No

University Telephone Number: No

Email Address saiwe210@student.otago.ac.nz

Email Address

damien.mather@otago.ac.nz

This study has been approved by the Department stated above. However, if you have any concerns about the ethical conduct of the research you may contact the University of Otago Human Ethics Committee through the Human Ethics Committee Administrator (ph 03 479-8256). Any issues you raise will be treated in confidence and investigated and you will be informed of the outcome.

The Evaluation of Milk Brands in Consumer Minds in Chinese Market
CONSENT FORM FOR
PARTICIPANTS

I have read the Information Sheet concerning this project and understand what it is about. All my questions have been answered to my satisfaction. I understand that I am free to request further information at any stage.

I know that:-

1. My participation in the project is entirely voluntary;
2. I am free to withdraw from the project at any time without any disadvantage;
3. Personal identifying information such as audio recordings and computer transcription documents will be destroyed at the conclusion of the project but any raw data on which the results of the project depend will be retained in secure storage for at least five years;
4. This project involves an open-questioning technique. The general line of questioning includes the past purchase experience and the evaluation of several milk brands. The precise nature of the questions which will be asked have not been determined in advance, but will depend on the way in which the interview develops and that in the event that the line of questioning develops in such a way that I feel hesitant or uncomfortable I may decline to answer any particular question(s) and/or may withdraw from the project without any disadvantage of any kind.
5. There will not be any potential harm in this research.
6. The results of the project may be published and will be available in the University of Otago Library (Dunedin, New Zealand) but every attempt will be made to preserve my anonymity.

I agree to take part in this project.

.....
(Signature of participant)

.....
(Date)

.....
(Printed Name)



Appendix D: Interview Transcripts

The first interview: 2014/4/19 (D is me, C is the interviewee)

D: firstly, I want to know some information about your family. Who usually bought daily necessities in your family, your mom, dad or you?

C: usually my dad goes to the supermarket, but sometimes dad and mom and I will go together.

D: do you know which brand or which category does your family usually buy?

C: yes.

D: do you know how often does your family buy milk?

C: we don't drink milk.

D: never?

C: yes.

D: did you ever buy milk?

C: sometimes my mom does bakery, and we will buy milk.

D: do you know which brand does your mom use?

C: I don't know.

D: you don't know?

C: because it is bought from a very big supermarket in Dalian

D: you mean Metro?

C: yeah.

D: can you figure out the picture of the milk brand?

C: yeah.

D: then I showed her some pictures from my phone. Do you know which country does that brand originally come from?

C: Holland. Then she pointed out it is Devondale (an Australian brand).

D: do you think, in your mind, your family only bought this brand?

C: in my mind, my mother likes to try different brands?

D: are they all foreign brands?

C: not really.

D: can you say the frequencies of milk your family usually buy?

C: twice a month. We bought one liter once.

D: can you rank different brands, according to its frequencies.

C: the first one is Devondale. Second one is a Chinese brand, Guangming/Bright.

D: how much do you usually spend once?

C: I don't know how much it is, actually, because we bought a lot of things together. I think about 10-20 RMB one liter.

D: you said you bought milk just for baking. Can you say the reason why you don't drink milk?

C: because my father has diabetes, he doesn't drink milk. And I don't really like milk, so does my mother.

D: do you have any substitutes, instead of milk?

C: no. I like drinking coffee, without milk.

D: your mother buys milk in the supermarket, you mentioned before. Does your mother also buy milk online, or dairy shops?

C: yeah, or in the dairy shops.

D: the reason why you don't buy it online is?

C: it is easy to buy it in the shops. You don't need to buy it online, and it cost a whole day something (I think it means transportation). Another reason is we don't use milk that amount, so we don't need to buy it online.

D: do you have any reason why you chose these two brands, not the others?

C: my mom trusts foreign brands more than Chinese brands, because many accidents happened. Guangming, she said is healthier than other Chinese brands. I don't know quite well about the truth.

D: do you buy any milk products as gift during holidays or festivals?

C: I think it is not the best choice as gift, but I know someone bought it as gift. As for my family, no one drinks it.

D: did someone buy a box of milk as gift to give your family, or your relatives' family?

C: yeah, used to. My parents' company used to give milk.

D: which brand?

C: Yili.

D: is it just called yili, not other sub-brands?

C: yeah. But sometimes they will change, Deluxe also.

D: Except these two brands, can you name another five examples?

C: mengniu, yili, guangming, eh..., anchor. I cannot remember other names.

D: anchor is a new Zealand brand, right?

C: yeah, but I don't usually drink anchor, I drink another one. I don't remember the name.

D: did you see the brand here or in China?

C: I saw it here. En, I think china also have.

D: do you know we also have a local brand, right?

C: I can recognize the bottle, but not the name.

D: is it sanhuan?

C: yeah, yeah, yeah

D: what the other questions? Oh, I have about ten phrases, and I want you to try to link these words with brands? If you think the word expressed the brand, tell me.

C: oh, my god. I don't usually drink milk.

D: I will ask you, so just tell me which one you think is appropriate. For example, Mengniu, I have fresh, unpolluted, nutritious, trustable, cheap, high quality, tasty, famous,

C: famous.

D: so you don't want to choose the other words, right? That's all right. Next one is convenient to buy, attractive advertisements, and pays attention to social responsibility?

C: maybe (refers to social responsibility).

D: I will repeat these words again, and if you want to add more, let me know. (Repeat again)

C: no.

D: as for Yili, which one do you want to choose?

C: famous, high quality, healthy (nutritious), and the last one (social responsibility).

D: mengniu has another brand, you know, called Deluxe? (I repeated these words again)

C: deluxe, I think is fresh, trustable, not cheap, high quality, tasty.

D: did you drink it?

C: yeah, I drank this brand, so I know it.

D: famous?

C: yes.

D: convenient to buy?

C: yeah. D: I think all the brands are convenient to buy? C: yeah.

D: attractive advertisements? C: yeah.

D: social responsibility? C: yeah (not sure)

D: then I showed her the image of Jindian. She said she does not really know this brand.

D: did you buy Guangming?

C: my mom bought it, but I don't drink it.

D: I repeated these words to her.

C: she chose trustable, cheap, high quality, famous

D: these are five national brands, and these are the other five international brands. I showed

her pictures in my phone.

D: the first one is the brand your mother usually buys, which is Devondale.

C: fresh, unpolluted (I explained the meaning to her in Chinese), nutritious, trustable, not cheap, high quality, tasty, famous (I don't know), not convenient, advertisements not really, social responsibility not really

D: the second one is Meadow Fresh

C: fresh, high quality, convenient to buy in New Zealand (so hard to buy, not really convenient to buy in China, the dairy shops don't sell it), tasty, famous (I don't know. If I don't live in NZ, I will not buy it). Not attractive, not social responsibility.

D: how about nutritious?

C: it depends on which kind of milk it is, like light, or trim? I think the original one is more nutritious.

D: unpolluted? C: yep.

D: trustable? C: yes.

D: is it because you live in NZ? C: I think the dairy products in NZ are very trustable.

D: another NZ brand, Anchor. You saw it in the supermarket, but you never bought it, right?

C: yes.

She chose unpolluted, nutritious. Then I said you cannot just choose according to the picture, and explained to her you can choose none of them.

C: trustable, not cheap. The others she does not know. Actually, I think anchor is very famous.

D: why do you think so?

C: because a lot of people mentioned about it, before, in China. It is more famous than MF.

D: did you hear before from relatives, or friends?

C: yeah, from colleagues.

D: do you think they usually drink it?

C: I think so. They usually buy it.

D: do you think they usually buy it in the supermarket?

C: yeah, I saw it before, and they said they bought it. so I think they can buy it.

D: is it in our city?

C: yeah.

D: can you relate any words with this one. (Country Goodness) if none, it's ok.

C: it is famous. Although I don't drink it, I know the bottle. So I think it's famous, high quality, fresh, not really high price.

D: how did you know it is famous?

C: it is famous because it is always in the supermarket. People can see it, so you know it.

D: these three brands are all NZ brands, can you rank which one is the most famous one?

C: I don't know (means all nz brands). I think the MF is the most famous, and then Country Goodness. I just don't like Anchor.

D: the last one, Lactel. How is it?

C: I just saw it. I have no idea about it.

D: which brand for you maybe, not for your mother, do you like to buy in the future?

C: deluxe. Or the NZ one, Meadow Fresh. if I can buy it in China, I will definitely buy the NZ one.

D: for your family, you always buy these two brands. If the other brands are on discount, will you think of trying to change?

C: yeah, because if they give the discount on the international one, we usually think the overseas dairy products are better, and more trustable than Chinese brands. We may try something different to see if it is good. Because the main idea of it is to try, if it is tasty, we will buy it, no matter is the full price or discount. But the first time, we will definitely depend on the price.

The second interview: (D is me, S is the interviewee)

D: did you ever buy milk, or your family ever bought milk?

S: yes, we did.

D: can you remember which brand you once bought?

S: because stock rising in my home city is advanced, there is much loose-packed milk there. Farmers milk and sell. We bought in kg in plastic bags. As for packed milk, we bought Mengniu and Yili.

D: which kind of packaging do you buy of mengniu and yili?

S: we usually buy milk in paper bag or paper box.

D: how often do you buy milk, no matter which package?

S: we buy loose-packed milk twice a week. Unless loose-packed milk is out of stock, we will buy box-packed milk. Sometimes, we buy box-packed milk with flavours, like banana flavour, or strawberry flavour.

D: which brand are they? Mengniu and Yili?

S: yes. We drink milk with flavours as soft drinks. Because in Xinjiang, we also local milk with brands, we buy it more often (Hua Yuan and Xi Yu Chun).

D: you said you buy milk twice a week, so how much weight do you buy each time?

S: my family seldom buy pure milk. We only buy it when we drink it as soft drink. As for loose-packed milk, it has half a kilo and a kilo.

D: do you buy a kilo once a time?

S: we buy it not for drinking. It is used for baking.

D: how much do you usually spend once?

S: loose-packed seems 4 RMB for half a kilo. Box-packed, like mengniu and yili, is market price. For our local brands, they are cheaper compared with mengniu and yili.

D: how much do you spend a week? Is it 14-15 RMB?

S: yes.

D: where do you usually buy milk?

S: loose-packed milk has a fixed place. Farmers collect two big pail of milk, and it is the same time every week. The locals all know the spot.

D: it is not a shop?

S: it is usually a minibus. Shops also have, like vegetable shops. In supermarket, they will put it somewhere.

D: are they all loose-packed?

S: yes

D: how about box-packed?

S: supermarket or small shops

D: according to frequency and preference, can you rank the milk brands in order

S: the first one is the loose-packed milk, because it is local, and its milk quality is better. The second is another our local brand (Xi Yu Chun), because it is cheaper. Because Xinjiang is the area with advanced animal rising, our local brands are more popular (more trustable). As for milk with flavours, we buy mengniu and yili more often.

D: do you know any foreign brands?

S: I don't know any foreign brands, but I know New Zealand milk is good.

D: do you think NZ milk is good, before you come here?

S: yes. I think it is famous.

D: there is a list of different pictures. Can you link these words or phrases with these brands?

First, as for bagged milk of mengniu, can you choose which association do you think is related with the brand?

S: high quality, tasty, famous, convenient to buy, attractive advertisement.

D: the second is bagged milk of Yili. And same key words

S: high quality, tasty, famous, convenient to buy, attractive ads (refers to milk with flavours)

D: mengniu and yili both have other sub-brands, which are more expensive, you know. The next one is Deluxe.

S: nutritious (she drank it before). High quality, famous, remember its ads

D: next one is Jindian

S: I didn't drink it, but only heard it before.

D: which word can you related to this brand?

S: nutritious and high quality. It is not more famous than Deluxe

D: how about Guangming? What do you think of Guangming?

S: I only heard it before. I think its market share is not big. She guessed it is cheap.

D: the following is some international brands. Can you find which one do you know?

S: (she does not know any of these international brands).

D: how about Nestle

S: high quality, tasty (refers to pure milk without flavour), famous. Compared with guangming, it is more convenient to buy. Cannot remember its ads

D: next is the local brand, loose-packed

S: fresh, unpolluted, nutritious, trustable, cheap, high quality, not tasty, convenient to buy

It is known through mouth-to-mouth

D: next is bagged local milk

S: half fresh (compare with loose-packed), unpolluted, nutritious, half trustable, cheap, convenient to buy (for local)

D: if let you go to supermarket, which brand will you buy?

S: depends on what function of buying milk it is

My mom likes using milk to make steamed bun. In summer, we buy milk to make yogurt

D: in your mind, can you relate these words with the whole New Zealand milk brands?

S: I think fresh is just so so. I didn't see its ads before. I think it is trustable, nutritious.

D: are there no foreign milk brands in your supermarket?

S: sometimes, when we go to another city close to my city, there are some foreign brands, but they are expensive. I think the local milk is very good.

D: do you go to the spot every week to buy loose-packed milk?

S: yes, because my mom every week bake steamed bun

D: do you want to change another brand

S: the local milk is told mouth-to mouth. If one of them is assessed well, after try it, the quality and source is good. You know the milk skin, and the milk skin of local milk is very thick, like a cloth.

D: do you think even the loose-packed milk is different sold in different places

S: yes. Different shops have different source of milk. We think milk sold in the minibus is best. Sometimes if it is out of stock, we may have the second or third choice.

D: will you buy bagged milk, if it is out of stock

S: no. we will buy the second choice of loose-packed milk. Because making steamed bun needs lots of milk, bagged milk is not valuable

D: do you think bagged milk of national milk brands is not trustable?

S: yes. I think foreign milk is also not trustable. During the process of making milk, there are some problems. Because we have loose-packed milk, I think it is better.

D: in the circumstances of buying milk as gift, which brand will you buy?

S: Deluxe. Or jindian sometimes

D: do you think it is more high-levelled?

S: yes.

D: do you have the difference between you and your mom, when you buy milk?

S: no. I sometimes will buy milk with banana or chocolate flavour.

D: do you buy mengniu in this situation?

S: yes. And there is a local brand called Maijuan, we buy it more often. Mengniu has some products also with flavours.

D: do you have many local brands?

S: yes, about three.

D: do you know you can buy milk online?

S: I know. But I think it is not trustable, and not necessary.

D: if let you describe milk except the words I offered before, do you have some ideas?

S: as for loose-packed milk, it is fresh, secure. It is also high-recognized on-the-ground. Through mouth-to-mouth, even though there are no ads, when it is sold, there are many people waiting there. It is sold in limited time. We can make some additional products from milk. The problem is its quality guarantee period is short. We buy it, and use only for that day.

D: as for the second brand you usually buy, how is it?

S: also a local brand. There is no ads, and much cheaper than mengniu and yili. I guess because of technical problem, the flavour of milk after processed is worse than mengniu and yili. But in consumers' mind, the quality is better.

D: what make you buy the local brand? Even though the flavour is not good, and there are no ads

S: I think it is region discrimination. I think the source of milk in Xinjiang is good. The time cost for transportation is short. Maybe we have some ignorance; the less the process of making milk, the nutritive value is saved better. Compared with yili and mengniu, maybe because it is processed less, it is more nutritious.

D: when you study in the university, do you buy any milk?

S: I still prefer local brands. (Means Guangdong, Shenzhen, and Hong Kong brands) with flavours

The third interview (D is me, S is the interviewee)

D: have your family ever bought milk?

S: yes.

D: who usually go to buy milk in your family?

S: me.

D: you? (Which I think she probably knows better than people who don't buy milk)

S: yes.

D: how often do you usually buy milk?

S: when there is no available milk at home

D: so how long is it? One week or two weeks?

S: about half a month, because my family buys Tetra packaging

D: it is box-packed?

S: yeah.

D: you buy a box of milk once a time?

S: yeah.

D: which brand do you buy usually?

S: guangming or Deluxe of mengniu (she said wrong words of Deluxe). As for guangming, I will buy calcium and low fat one, and it is green package.

D: how much do you spend for a whole box?

S: about 50 RMB.

D: does it mean, you have to spend 50 every two weeks?

S: less a month.

D: does your family drink milk every day?

S: yes. And another thing is, when I began to lose weight, I bought imported milk. Because of melamine scandal, my family has changed milk brands. My mom buys milk on the website called "One Shop". We buy this big and skimmed milk.

D: where do you buy milk, including boxes of milk and imported milk?

S: we buy it on the website of "One Shop".

D: even though like guangming or Deluxe?

S: for guangming and Deluxe, we bought it in the supermarket. But afterwards, we didn't buy these brands.

D: did you mean after melamine scandal?

S: yes.

D: in terms of last year, if according to frequencies and preference, can you rank several different milk brands?

S: the first one is Anchor, which is a NZ brand. The second is em(she could not remember the name of the brand, then we checked some pictures). It is this one, Oldenburge (it took nearly a minute to find out which brand it is. Then she thought maybe another brand, called Devondale, she also bought.)

D: after you have changed to buy imported milk, how often do you buy online?

S: my mom usually buys a lot, because it has discount, and it can be stored for long time.

D: one month or two months?

S: I think around two months.

D: why do you put Anchor in the first place? Which element of this brand attracts you?

S: one is the safety issue. Another reason is someone recommended this brand. I tried, and found the taste was good, though it is skimmed.

D: in what circumstance will you mom change another brand?

S: cheap! Have discount!

D: do you also use milk for baking?

S: seldom.

D: next is this table. There are around ten brands here, and I want you to find which words can be linked with the brand. Do you know guangming is a Shanghai local brand?

S: yes.

D: do you have any other local brands in Shanghai S: no.

D: have you ever bought Mengniu? S: yes.

D: I will read these words, if you think it is related, let me know. (I just read these words)

S: I think it is convenient to buy, because you can buy it in the supermarket. I also think it is trustable, because it is a big brand in China. What is this one?

D: nutritious?

S: so nutritious.

D: but after melamine scandal, you even didn't buy Deluxe, why you think it is nutritious and trustable?

S: because this kind of package is fresh, it is more nutritious than box-packed, I think. It is also fresh, I think.

D: as long as you think it is appropriate in your mind

S: yes. It is also famous.

D: the next one is Yili, and same words

S: my family did not buy Yili at all. Because now we buy gift during holidays, only buy Deluxe. Is it the same in your city? One of the reason is the package is attractive, the other reason is it is expensive. It only has 12 small boxes, but the price it equal to maybe another brand's 20 boxes. People may think the more expensive, the better.

D: is it because the market share of Yili in Shanghai is not very high?

S: there are many in supermarkets. My family and I prefer to Mengniu.

D: how about Deluxe with these words

S: the second one-unpolluted, and trustable, famous, attractive ads (牛奶只喝特仑苏).

D: do you think it has social responsibility?

S: don't think so

D: next one

S: it is Jindian? D: have you bought it?

S: I drank it. But it was free, when I was doing volunteer. I don't have special impressions.

D: how about the taste when you drank it?

S: it seems the milk flavour of Deluxe is heavier.

D: compare these two, what's the difference between them? What is the shortcoming for Jindian?

S: the package of Jindian is not better than Deluxe. But I heard from my teacher that the quality of Yili is better than Mengniu. Maybe the ad is not better than Deluxe.

D: which package of guangming did you buy?

S: just this package.

D: which words can you think of?

S: trustable, convenient to buy (dairy shops also have), high quality, and tasty. It has some fresh packages, real fresh one. It is a bottle, having cover with aluminium foil. It can be delivered to your home every day.

D: did you buy it?

S: when I was very very little. It is called "guangming Xpress order".

D: do you think it is fresh this package, box-packing?

S: it is not fleshier than bottled one.

D: how about unpolluted?

S: I think it is also unpolluted. Because it is a local brand of Shanghai

D: do you know if there is cattle farm in Shanghai?

S: do you know Chongming Island? There seems is a farm. The production factory is in the Minhang District. Because it is local, we think it is fresh.

D: do you think it is nutritious?

S: en... it is hard to say

D: does guangming have any ads in Shanghai?

S: there are some. But I think there are not many television ads, there are some paper ads. You know, in a residential community, there are some people ordering bottled milk. The milk carton has Guangming on it, there is no need to have extra ads.

D: is it means there are some people now still ordering bottled milk?

S: yes. There are some different flavours.

D: is it expensive?

S: cheaper than this one (on paper). There is delivery every day.

D: why you did not order it now?

S: it is too troublesome. You have to pick it up every day. And you have to put the bottle back. When you go out, all the milk bottles are in the milk carton without picked up. There was not Tetra Pak. After primary school, we haven't ordered this type of milk.

D: there are some international brands here. Which brands have you bought?

S: Devondale

And Meadow Fresh, I haven't bought it, but I know this brand is NZ brand.

D: have you known it when you were in China?

S: yes. After I came here, I found it is like a national product, existing everywhere.

Oldenburg, I did not buy this package of milk. (She could not remember the details).

Country Goodness, I bought it before. My mom wants to drink this.

D: as for associations with these brands. How about Devondale?

S: unpolluted, nutritious, trustable, high quality, tasty, convenient to buy

When in discount, it is also quite cheap.

D: have you compared imported milk and Deluxe, which one is cheaper?

S: my mom said it is the big 1 litre is cheaper. 1L is a bit more than 10 RMB. Country Goodness is cheaper, and it is high quality and taste is not bad. I am not sure if it is very famous. Convenient to buy, mainly online, and deliver to your home

D: how long does it take to deliver?

S: it takes two or three days on "One Shop".

D: did you see any ads of this brand? S: no

D: how did you know this brand is good?

S: there is not good or bad. Mainly, if it has imported from Australia or Germany, as long as not Chinese products, I would like to try.

My mom likes Country Goodness. I think it is unpolluted, nutritious, trustable, cheap, tasty (my father also likes drinking it), and convenient to buy. I think the most famous one among these is Anchor, for me. Because Anchor also has butter and something, I like Anchor's butter. My classmates also know this brand.

D: have you seen its ads?

S: probably not. I didn't notice it before.

D: how about Meadow Fresh? Have you seen it in China?

S: no.

D: ok. Let's talk about Anchor.

S: unpolluted, nutritious, trustable. I found it is expensive, even in New Zealand. I found the shelf life is shorter than others. But I think its milk flavour is the heaviest. And high quality, tasty, famous I think, convenient to buy it online.

D: next is Nestle

S: I also like drinking Nestle, especially the chocolate flavour. Pure milk I still like Deluxe. I brought milk to school every day. Nestle in Shanghai, I think, is quite famous. People trust it.

D: you have drunk Lactel before, how is it?

S: it is just for fun. I want to taste it. The milk flavour is quite strong.

D: do you think it is more convenient to buy online than in the supermarker?

S: yeah. For "one shop", it is a big website, so you can believe in it. It is also deliver to home, so it saved your strength to lift. Though you have car

D: now you only buy milk online, will you change brand if there is another one on discount?

S: supposed to change. As for brand loyalty, I just follow the price. Because you don't know each brand, you may just want to try. You may find the one you prefer after comparing. After you find the better one, I will stare at that one. Definitely, the price is one of the considering factors.

D: you mentioned Anchor is the first one, according to frequency and preference. But it is quite expensive, why you still buy it?

S: because I like it, and I am on a diet. Skimmed milk, especially 99% defatted, there is not many brand have this kind of milk. In China, there is not much choice. So after someone recommended it is good, and with strong milk flavour, I bought it.

D: will you consider buying different brands according to your families' taste?

S: maybe. I may not buy Deluxe for old people. Because they are not used to fat free milk, and for my grandparents, they like fresh packing milk. They think it is fresher when buy milk once a week. Because storing for long time, even though with high technology, there might be preservative in it. They have this consideration.

The fourth interview: (D is me, E is the interviewee)

D: I asked you before, did you ever buy milk, and you said yes. So who usually buy milk in your family?

E: usually my dad, and sometimes my mom also buy milk

D: how many people do you have in your family?

E: three people

D: as for pure milk, which brand does your family usually buy? Can you remember?

E: how many brands should it be?

D: any many as you want

E: mengniu, yili, and sanyuan

D: how often does your family buy milk?

E: usually once a week

D: how much amount do you buy?

E: usually a box of milk (refers to the big box)

D: what kind of package in the box?

E: it is Tetra Pak in the box, sometimes big one, and sometimes small one

D: but a box once a week, which is quite a lot

E: yeah, my family drinks quite a lot. We drink in the morning, and in the evening.

D: can you remember how much is one box?

E: I think it is over 40 RMB, or over 50 RMB

D: the brands you bought are called mengniu and yili, not their sub-brands?

E: yeah.

D: where do you usually buy?

E: supermarket

D: did you ever buy it online or in the dairy shops?

E: no, my family does not trust it. We usually go to the supermarket, and buy anything for this week.

D: according to frequencies and preferences, can you rank the brands of milk you bought?

E: generally, sanyuan, mengniu, yili

D: anything else?

E: guangming

D: have you bought any foreign brand? E: no

D: have you heard of any foreign brand? E: yes

D: why did you put sanyuan as the first? Does it have any difference from others?

E: it seems sanyuan has not come out with any scandals. Actually, before the milk scandal, my family thought there was no problem of milk. After that, it seems mengniu also has some scandals and problems. Guangming also had problems, I think. Among these brands, sanyuan does not have any problems. When I watched its ads, I think it is trustable. Milk is produced every batch, if we drink the batch with problem, it is a big problem.

D: do you buy milk only for drinking? Do you use for baking or as a gift?

E: usually just drink. Sometimes use milk with cereals

D: if imagine, in a month, how many times do you buy sanyuan, and how many times do you buy mengniu and yili?

E: I think one time for sanyuan, two times yili and one time for mengniu

D: why did you buy yili for an extra time? What is the reason?

E: I think it is price issue. Sometimes it has promotions. It will have some extra bags tied out of the box, or some small gifts. Sometimes you are hoodwinked.

D: as for mengniu, what the good aspects or bad aspects of it, compared with the other two?

E: I don't feel it has some good aspects. To be honest, I did not taste different among different brands. Because you once buy a brand, and you drink it for a long time, but mengniu is such a big brand. Even you don't buy its milk, you may buy its yogurt, cheese. You may think it is reliable. And mengniu was the special milk for some activities, like Olympic game. I think this has some effects. Because it can hold the responsibility, we assume that it is not too bad.

D: how about yili? What is the different for it?

E: I think the price is lower than the others. Besides, special for the Olympics is written on the package.

D: do you think it has any quality difference for yili?

E: I did not feel any difference for quality difference.

D: can you say any foreign milk brands?

E: yashili.

D: it is milk powder. Do you know any brands for pure milk?

E: I saw some milk powder brands before I came here. Maybe not pure milk

D: I have some pictures of milk brands; can you find any brand you know?

E: I only know Anchor.

D: did you know it before you came here

E: yeah. I do not know the others. I know some of them after I came here.

D: how did you know Anchor?

E: I saw it on some websites before, and said it is foreign brand and is good.

D: did you drink it or buy it?

E: no. for pure milk, I seldom drink it as soft drink. We only drink milk my family bought. There are two points for buying milk, one is quality, and the other one is price. It is quite a daily necessity.

D: do you think it is not convenient to buy?

E: I think milk... for beverages, we would prefer to buy mengniu yogurt (changing, daguoli) or something like that.

D: don't you think the quality is better than mengniu and the other brands?

E: yeah, if you say, I would agree with that. If there is a foreign brand, especially a New Zealand brand, and there are also domestic weather-beaten brands, I will think the foreign brand is better.

D: did you see it in the supermarkets?

E: no. I won't particularly go to see it.

D: do you think the price is higher than domestic brands?

E: definitely.

D: there are around 10 different brands. On the left, there are 11 words or phrases; can you try to find which word is related with the brand? For the foreign brands, you only know Anchor, right? Do you know Nestle?

E: I am familiar with Nestle. The photos you showed me, Nestle is not among the brands.

D: yeah, because I think it entered into China very early.

E: yeah, very very familiar with it. I did not notice the sub-brands of mengniu and yili.

D: did you buy it before?

E: yeah, especially during the Olympic game, the endorsement of yili is Liuxiang. As long as half a year, I brought jindian to school every day. so this brand and that brand are different, though both for drinking, levels are different. As for gift, we once bought it as gift.

D: so let's do this table. The first is mengniu.

E: cheap, famous, pay attention to social responsibility

	mengniu	yili	deluxe	jindian	bright	anchor	nestle	sanyuan
fresh			√					
Unpolluted			√			√		√
nutritious			√	√				√
trustable			√			√		√
cheap	√	√						
High quality			√			√	√	√
Tasty				√	√		√	
famous	√	√	√		√			√
Convenient to buy			√	√	√		√	
Attractive advertisements			√	√	√		√	√
Pay attention to social responsibility	√				√			

D: for Beijing, do you regard sanyuan as a local brand?

E: I did not care about its origin. I feel where does the brand come from does not matter. Like mengniu and yili, these big brands, I feel they are Chinese brand (means famous), so I did not care if it is produced in Beijing. But probably sanyuan is a Beijing brand, because it is endorsed by Geyou (a Chinese famous actor).

D: sanyuan's headquarter is in Beijing. For you, the local brand is sanyuan, I think.

E: is jindian a brand?

D: it is a sub-brand of yili.

E: I know it is a sub-brand of mengniu or yili. When I feel a little bit distrust for the parent company, I will link them together. I remembered yili also has some problems. After I know, I am not interested in jindian also.

I think the ads of jindian are good. The products of jindian, or its brand, give me a good feeling of its perception. I feel it is unscale. The ads make you feel good. The ads are “为爱甄选，唯有金典”.

D: is it the ads during Olympic game?

E: not only for the Olympic, but also afterwards. There was a drama before; the ads of it are “爱她就带她看雪狼湖”. If you want to give this to a person, he or she will think you regard him or her importantly. I think it is the additional value.

D: compared with mengniu and yili, how about mengniu’s ad?

E: “not any milk is called Deluxe”. This ad I also quite like. In my mind, I think Deluxe is more upscale than Jindian. And its value is higher than Jindian.

D: why?

E: because I know jindian is a sub-brand of yili, but deluxe is a single brand.

D: deluxe is mengniu’s sub-brand.

E: I did not know. I feel, from package, deluxe is longer than jindian. I feel it is tall, big and superior. And the price is more expensive. If I bring jindian to school is one feeling, and if I bring deluxe to school is another feeling. I think it is to research consumer mind about its impression.

D: does sanyuan have a sub-brand?

E: I don’t know. Even it does have, I have not noticed it. If we want to buy gift or receive gift, it is usually deluxe and jidian, probably. If you give deluxe, you will feel more superior.

I think sanyuan is famous, but I don’t know if it is the reason that I live in Beijing.

D: you can just depend on your feeling. Did you ever buy guangming?

E: seldom. We bought it for few times. In my mind, I know guangming has a kind of milk, called fresh milk. Milk we bought is called pure milk, not the current day’s milk. I think it is guangming has fresh milk, which is soft package. We sometimes bought several packages, and drink it that day.

D: the expiration life is only one day?

E: yeah, after one day, it will be bad. In this aspect, I will prefer trust guangming, because the other companies do not have this type of milk.

D: another question is, as for sanyuan, which brand you usually buy, if the price increases from 3 RMB to 3.5 RMB, will you still buy it or change to another brand?

E: I think possibly I will change. Because my family drinks lot milk, if one bag’s price increases by 0.5 RMB, then how much the whole box will be? For example, why we buy sanyuan this week, and we will buy mengniu for the next week, it is because that brand is in discount or has some promotions. Therefore, it depends on the price, if we have to buy a lot. We will not pursue quality all the time.

D: even though after the milk scandal, if there are two different brands, one brand's quality is much lower, but the price is lower also. Which one will you choose?

E: it depends on how much difference of their price. If only a few RMB, I am ok with the higher price one. But if one bag has few dollars' difference, I may buy the cheaper one.

D: if a box of milk's price has increased from 40 to 45, will you still buy it?

E: I think that's ok. There is not much difference.

D: if it increased to 50?

E: I think it is quite expensive. I can use the extra 10 Yuan to buy something else.

The fifth interview: (D is me, C is the interviewee)

D: the first question is does your family drink or buy milk?

C: yeah, we drink and buy milk

D: if we mention the category of milk, which brand will you recall from mind?

C: Chinese brands? D: yeah

C: sanyuan, mengniu, yili. Where does Deluxe comes from?

D: it is the sub-brand of mengniu. Which brand does your family usually buy?

C: now it is sanyuan.

D: do your mom and dad drink it? Do you drink it?

C: my parents drink. I don't drink.

D: how often do you buy?

C: almost every three days.

D: how much do you buy for each time?

C: four bags

D: how much do you usually spend on milk?

C: basically, 10 RMB. Because the milk is quite cheap, bag-packed, 0.8 Yuan each bag

It is sold in the convenience shops in the community

D: do you also go to supermarket to buy milk?

C: we buy defatted milk in the supermarket. My mom does not know the price, because she has friend who works there, they give her directly.

D: who drinks the defatted milk?

C: my mom drinks it for losing weight. She does not drink it very often. When she drinks it, she drinks milk with protein powder.

D: for the defatted milk, which brand is it?

C: also sanyuan, a big box

D: is it 1L? C: yeah.

C: when I was young, I drank the small box of milk

D: so you don't drink it now? C: no

D: do you drink milk in New Zealand? C: no

D: can you rank milk brands according to your frequency and preference?

C: sanyuan, mengniu, yili. We used to drink mengniu, and the last one is yili. My mom said it is too dilute.

D: Do you refer to Deluxe for mengniu?

C: yeah.

D: are you still buying Deluxe?

C: yeah, we buy a big box of it.

D: who drink it? C: my mom, my dad does not drink it.

D: what's the difference for you to buy breakfast milk and Deluxe?

C: I don't know. A box of Deluxe can be finished for very long time. Breakfast milk, my mom drinks it every day.

D: If we use sanyuan as an example, the price now has increased from 0.8 Yuan to 1.0, will you continue buying it?

C: yes, it seems the price of it is 1.2 in the supermarket.

D: so it is cheaper in the convenience shop?

C: yes, I don't know why

D: your mom does not buy it in the supermarket usually? C: usually not

D: if the price in the convenience shop is equal to the supermarket, will you buy it?

C: yes.

D: will you recommend the milk you usually drink to others?

C: perhaps. But I am afraid they don't like the flavour

D: what's the difference of its flavour, compared with pure milk?

C: it is different. It has a flavour of wheat and egg.

D: do you know any foreign brands?

C: en... beiyinmei?

D: it is milk powder. I mean pure milk

C: I don't know really

D: did you see before in the supermarket?

C: no, I usually don't go to see milk products

D: if your mom will go to the supermarket, will you let your mom buy milk for you?

C: no, I will not buy even me go to the supermarket with my mom.

Usually, when I go to the supermarket, I will go to see yogurt category

D: do you drink yogurt?

C: yeah. Yogurt does not have some flavour

D: why yogurt does not have some flavour?

C: yogurt does not have a strong smell

D: if you drink yogurt, which brand do you like?

C: yili (大果粒)

D: for milk brands you usually buy, do you think these brands are value-for-money?

C: I think they are value-for-money

D: do you think all of them? Like deluxe?

C: deluxe is quite expensive, does not feel value-for-money

D: did you drink it before?

C: yes, once taste a little bit. But feel awful, strong smell

D: do you trust the companies of mengniu, sanyuan, and yili

C: because there are many problems of these companies, mengniu seems decrease from the first to somewhere I don't know. Only deluxe now is in the supermarket.

D: really?

C: yeah, I heard from my mom. The other products of mengniu now are placed in a small corner in the supermarket. Sanyuan is placed in the mail place in the big fridge, and then is yili. You nearly cannot find mengniu in the fridge. Only deluxe left

D: but deluxe does not need to be put in the fridge

C: yeah, so it is put somewhere close to fridge. Someone will buy a whole box of deluxe, and there is no single-selling. And on the package of sanyuan, there is a sentence like "dedicated for the Great Wall". So my mom thinks everyone is buying sanyuan now.

D: have you considered sanyuan as the local brand of Beijing?

C: I feel it is forced to buy sanyuan. When I was young, my mom did not buy it. After we know there are some problems of mengniu, we began to buy sanyuan.

D: before the problem, did your mom buy mengniu's milk?

C: yeah. Like mengniu's breakfast milk, but I feel the taste is the same.

D: did you ask your mom, what's the difference between mengniu and sanyuan?

C: she thought milk of mengniu was pure and fresh, and sanyuan is just so so. But now, after mengniu's scandal, sanyuan now is pulled to be the first.

D: so it is just because there is no problem with sanyuan

C: yeah, safe is important. We have no other choice.

D: here are some words and phrases; you have to choose some of them that are linked with the brand. For example, the first is mengniu, and you are familiar with it. Do you think it is fresh?

C: mengniu, fresh or not fresh? Maybe fresh, no, not fresh, because the expiration date is 45 days.

D: which package of milk do you mean?

C: paper-package

D: you once bought this kind of package?

C: yeah, like breakfast milk. I think this paper-package is not fresh, but the soft-package is fresh. The soft-package milk seems to be stored for only 7 days.

D: do you think it is unpolluted? C: it is polluted.

D: do you think it is nutritious? C: perhaps nutritious.

D: do you think it is trustable? C: it is not trustable now.

D: is it cheap? C: probably cheap

D: no matter which package, do you think they are all cheap?

C: soft-package is definitely cheaper than paper-package

D: I did not include Deluxe in these previous questions

C: I think deluxe is the most not fresh one. It can be stored for so long time. Perhaps 18 months or 16 months, or maybe 6 months. I like looking for its expiration date.

D: do you think mengniu's breakfast milk is high quality?

C: just so so

D: how about its taste?

C: taste is not good, too strong. (Because she does like drinking milk, each brand of milk she thought is not good). In new Zealand, the taste of milk is good, not much milk taste.

D: do you drink milk in nz? Which brand do you buy?

C: I don't know. Because my host buy milk, the lid of milk I know is blue.

D: how do you drink milk, with coffee?

C: I put cereal with milk together.

D: do you think it is famous?

C: it was very famous. But now people are contradictory when they hear mengniu. When I went back home, I asked my mom why you don't buy mengniu now. my mom said there is no mengniu, really. There were many different types of mengniu's milk in the supermarket like chestnut, chocolate and Fortified with calcium, general... Because my cousin drank milk like water, my aunt always buys milk. But now she does not drink milk.

D: so she does not drink mengniu only?

C: yeah, she drinks sanyuan now. But there are not many different flavour of sanyuan

D: do you think it is convenient to buy now?

C: not convenient, because only a small corner is selling mengniu.

D: how about the convenience shops in your community?

C: there is no mengniu milk now in the convenience shop

D: really? C: yeah

D: did you once watch its ads? C: only deluxe

D: how about ads before its scandals?

C: there were many ads before, different category of milk. Now there are only the ads of sanyuan. (三元, 人民大会堂专用)

D: do you think it pays attention to social responsibility?

C: I thought it was very believable, because everyone bought mengniu. Mengniu and yili was competing with each other, but I don't know what's wrong with yili, people just don't like yili. After mengniu's scandals, people feel disappointed, and only buy sanyuan.

D: because of milk scandal, yili is also influenced; do you think it is believable?

C: it becomes worse, but better than mengniu.

D: in your mind, your family does not buy yili?

C: we do not buy its milk, and we only buy its yogurt. Because it has my favourite flavour

D: as for deluxe, you said it is not fresh

C: yeah, it can be stored for very long time.

D: do you think it is unpolluted? C: it should be unpolluted, but I don't know why it can be stored for so long

D: do you think it is nutritious? C: just so so

D: is it trustable? C: supposed to be trustable

D: do you think it is different with another pure milk of mengniu?

C: I think they are different. I think mengniu pure milk is better than deluxe. I don't know why people now praise so highly of deluxe. I feel it is the same when drinking.

D: but you said you trust deluxe?

C: yeah, but we don't know if it contains high calcium. Perhaps drinking deluxe like water

D: do you think it is cheap?

C: not cheap. It is always sold in a big box

D: is it high quality? C: should be.

D: do you think it is famous? C: famous, I don't know why it is so famous

D: is it convenient to buy? C: yeah, but they are all sold in a big box

D: did you see its ads? C: I saw it (特仑苏, 经典牛奶).

D: do you think it is one of reasons that attract you to buy?

C: yes, should be. I think it is very important. Mengniu released deluxe

D: do you think it pays attention to social responsibility

C: after that thing, it began to pay attention

D: do you think because it did not pay attention to social responsibility, so it happened.

C: I think now it quite pays attention to. It does not have many ads now.

D: do you think there is difference between the deluxe and breakfast milk?

C: there is some difference. I think the package is different.

D: if your mom let you go to the supermarket, which brand will you buy, as for sanyuan and mengniu two brands

C: sanyuan. D: for safety? C: yes.

D: if your mom wants you to buy a more expensive one?

C: I will buy more bags, because deluxe is so expensive, something like 80. I remember that it was 40 something four years ago. Now the price is doubled. But I think it is good to buy deluxe as a gift, such as going to my grandmother's home. Breakfast is for drinking by ourselves.

D: did you buy jindian before?

C: when I was very young. Because it was new, for curiosity, and the taste is not strong. Afterwards, deluxe came out. They thought deluxe's taste is strong, they bought it

C: is there jindian still available now? D: sure, there are many different tastes also.

C: I think I did not see it in the supermarket. I just saw deluxe, and I ran away.

D: but if you buy milk as a gift, you should also see jindian somewhere near deluxe.

C: en, but it seems jindian is put so far. I bought deluxe before, and jindian is much cheaper than deluxe.

D: how do you think jindian, in terms of these associations?

C: I think it is the same as deluxe. Not so fresh, because it can be stored for very long time. Its fame is not higher than deluxe. Is jindian belonging to yili?

D: yes. Do you think it is nutritious?

C: should be.

D: do you trust yili? C: not really, I don't know why.

D: do you think it is cheap? C: cheaper than mengniu

D: how about its quality? C: so so

D: is it famous? C: it was very famous.

D: what your relatives or friends buy now, do you know?

C: all deluxe. Sometimes sanyuan. Sanyuan is for someone who drinks milk like water. Deluxe is for drinking one box daily.

D: did you see jindian's ads before?

C: yes, even three times a day.

D: do you think it attracts you to buy their products?

C: I think so. I like the golden package before.

D: have you seen the ads yili corporate with liuxiang? C: no

D: is it convenient to buy? C: used to be, now it is a little bit difficult.

D: how do you think this company?

C: I think because of my families does not like, so I think it is just so so

D: do you believe more in mengniu? C: yeah.

D: even though there is some problem with mengniu?

C: yeah. We still buy deluxe when we buy box-packaged milk.

D: do you know yili was built earlier than mengniu? C: yes.

D: do you drink guangming? C: no, I have not heard of it.

she did not see any foreign brands of milk. As for Sanyuan: she chose unpolluted, trustable, high quality, pay attention to social responsibility

The sixth interview: (D is me, B is the interviewee)

D: do you buy milk and drink milk?

B: I drank milk.

D: do you buy milk by yourself or with your parents?

B: I bought milk by myself

D: how many people in your family?

B: three people

D: which brand of milk do you buy usually?

B: I once bought yili, afterwards, I bought mengniu, and then was guangming.

D: why did you change from yili to mengniu and then guangming?

B: because I want to taste the other brands' flavour.

D: when does this change happen? During last year or last few years?

B: last few years

D: how often do you buy milk?

B: after finished.

D: how much do you usually buy for each time?

B: different brands have different amount in a box. If six packages in a box, I buy a box once a week. If it is 12 packages, I buy a box every two weeks.

D: which brand has 6 packages in a box?

B: guangming.

D: is it also small boxes, not paper-packages?

B: yes.

D: in terms of a week, do you know how much do you spend on milk each week?

B: different brands' price is different

D: how about six packages in a box?

B: I always count by unit price. Price ranges from 1.9-3.2 RMB.

D: which brand is 1.9?

B: it is the ordinary one of yili.

D: which one do you refer to?

B: the most ordinary one?

D: do you mean the soft-package one?

B: no, also box-package

D: how about 3.2?

B: it is mengniu something, I forget.

D: does it use mengniu as the brand? Not using deluxe?

B: it is deluxe, but deluxe+ something, not deluxe. More expensive than deluxe

D: how much is deluxe?

B: in my hometown, it is sold 2.9 or 3.0

D: where do you usually buy milk?

B: I usually go to the grocery store which is close to my home.

D: is it convenience shop?

B: small store which sells breakfast and bread

D: don't you go to the big supermarket?

B: no, I don't go to the supermarket. Because the small shop is close to home, it is easy to move

D: do you also buy it online?

B: no. because the internet was not very developed, and it is not necessary to buy online.

D: in terms of last year, can you rank milks brands according to your frequency and preference

B: I changed to drink yogurt last year. (Which shocked me)

D: so you did not buy milk last year?

B: I only bought four times of milk last year

D: why did you change mind to drink yogurt?

B: one of the reasons is that my friend told me it is not good to drink milk. He recommended a book about health. The book is written by someone in the WHO.

D: you changed to drink yogurt from last year?

B: I usually drank milk before last year. Milk and a kind of fruit milk (which I don't know)

Fruit milk is a kind of dairy product

D: so if we count the period you bought milk, which brand did you buy often?

B: I bought for most of the times were yili.

D: how about the second one? B: mengniu

D: so the third was guangming? B: yes

D: do you know any foreign brands?

B: Dutch Lady

D: is it liquid milk, not milk powder?

B: it is pure milk

D: where can you get this brand?

B: jizhi island. It is sold in the convenience shop in Guangzhou.

D: how much is it?

B: the price ranges from 3 to 6

D: how much amount of each unit

B: about 200 ml

D: how did you know this brand?

B: I once drank its milk powder when I was young

D: so when you saw it also sells adult milk, you will buy?

B: yeah.

D: how long do you buy for this brand?

B: It is not for how long, but for how many times. Because it is too expensive, I don't buy it very often. Its taste is different. Milk flavour is strong. It tastes so different with domestic milk.

D: how many times do you think you bought this brand?

B: it can be counted, less than 10 times.

D: how many did you buy each time?

B: 1 or 2 bottles. It is sold by a small bottle

D: does you parent drink milk?

B: my mom drinks yogurt, and my dad did not drink milk. But from last year, he began to drink milk. He saw some magazine said that milk with pieces of apple is good.

D: during the period of buying milk, if the price of yili changed from 1.9 to 2.2, would you still buy it?

B: I would buy.

D: but it became more expensive, why do you still want to buy? Do you think it is still cheap?

B: no, if you have getting used to one brand, after changing, your body will not be used to the new one. The body need a period of adaptive phase.

D: as for mengniu, if the price changes from 3.2 to 3.5 will you buy it?

B: I will buy. But if it becomes 4.0, I will not buy.

D: will you recommend the brand you like to others?

B: I will recommend to my best friends

D: what is the reason for convinced others?

B: it is pretty good.

D: if you cannot go to buy milk, will you let your mom buy milk for you? Will you point out the specific brand you want?

B: I will.

D: the brands depend on which brand you are drinking now?

B: yes, I will even tell how many I want to buy

D: how many do you usually want?

B: usually I will say how many units, if fewer than 12. If more than 12, I will not let her buy.

D: if there is no milk at home, how much will you let your mom buy?

B: 12. But if I go with her, I will buy 24.

D: is it because it will be heavy?

B: yeah.

D: do you think all the brands you buy are value-for-money?

B: I think if the price is around 3, it is quite expensive, not value-for-money.

D: do you mean the brand of mengniu, you mentioned before?

B: yes. Golden deluxe.

D: because there are many problems with milk brands in china, does it have influence on you purchasing milk?

B: it has influence.

D: will you change brand or just don't buy any milk?

B: I will not buy any milk.

D: because the problem started from 2008, did you decrease the frequency of purchasing milk?

B: actually not. When it first happened, I did not change my mind. After I read some articles, I began to decrease the amount of purchasing milk. There were some in-depth researches. After I know the inside story.

D: which brand or brands will you not buy, because you don't trust them?

B: I think mengniu has problem. I will not buy. Yili also has problem, but there is selectivity, because I trust the overseas investment of yili.

D: except these two brands, how about guangming

B: after it had problems, I did not buy it either.

D: will you link mengniu and deluxe? If mengniu has problem, you will also not buy deluxe?

B: yes.

D: is there any local brand in your city?

B: yes. There is buffalo milk.

D: did you once buy it? B: I drank two or three times.

D: how do you think about it?

B: it is similar with the ordinary milk. But most locals will buy it.

D: why don't you buy it? B: I have given up milk at that time.

D: does your parent buy this milk?

B: no, because it is filled in glass bottle. You have to return the bottles.

D: is it cheap? B: it is also more than 2.

D: do you think the quality is good? B: I think the quality is good.

D: because it is troublesome, you don't buy it? B: yeah.

D: does this brand have any paper or box-packaged?

B: I did not notice it. The brand name seems to be baifulu, but I am not sure.

D: the next question is this table.

B: I bought jindian less than 10 boxes. I bought guangming around 5 boxes.

D: did you buy milk with brand of yili or jindian.

B:jindian.

	deluxe	jindian	Dutch lady	nestle	Local brand
Fresh					√
Unpolluted			√		√
Nutritious			√		
Trustable	√	√	√	√	
Cheap					
High quality			√	√	
Tasty					
Famous					
Convenient to buy	√				
Attractive ads	√	√			
Pay attention to CSR				√	

B: (he thinks guangming is not linked with any association) I just want to try a new brand. I did not buy it for many times.

D: the next is some foreign brands. Have you ever noticed foreign brands in the big supermarket?

B: no. (He does not know any brands of photos in my phone)

D: do you know the details of this brand? (Because he said he once saw one of the brands)

B: I cannot remember. Sometimes, there is special festival of different countries.

D: did you ever buy it?

B: no, it is too expensive.

D: do you think it is quite expensive of the local brand?

B: no, it is cheaper than these brands (deluxe and jindian), but it more expensive than the ordinary milk. It is usually bought by parents, not like our age.

D: do you think there is any difference among deluxe, jindian and guangming?

B: this quality of package (guangming) is worse than others. Deluxe and jindian's straws are better than guangming.

D: but in terms of milk, what's the difference among these brands? Do you think straw is the factor that influences you to buy that brand?

B: I think straw will influence my choice. If straws are designed special, it will influence.

D: except the package, do you have any other opinions?

B: and ads. Their ads are great. It always remind you to buy their brands.

D: how about taste?

B: deluxe's taste is stronger than whole milk. Deluxe and jindian's taste are strong. And deluxe's name. it is more like dairy producer. Jindian is strange (refers to its name). guangming, the name sounds trustable.

D: if there is a brand on discount, will you change?

B: it depends. If it is 10 percent discount, I will not change. If it has 20 percent discount, I will think about it. If it has 30 percent discount, I will buy.

D: why do you only buy box-packaged, not soft-packaged?

B: I think it is personal habit. I think soft-packaged is not sanitary. I think the drinking way is troublesome.

The seventh interview: (D is me, P is the interviewee)

D: does your family buy and drink milk?

P: we drink and buy milk

D: which brand does your family usually buy?

P: deluxe and yinqiao. Yinqiao is Xi'an local brand.

Basically, we buy these two brands. Is deluxe belonging to mengniu?

D: yes. How often do you buy these two brands?

P: we buy deluxe about every three weeks. We once booked milk. It is fresh, and produced every day. Two bottles are delivered every day.

D: when did you order milk? How many years ago?

P: two years ago. We felt that milk is not so fresh, so we did not continue to order.

D: how often do you buy yinqiao?

P: it depends on personal preference. Because my grandma has hypertension, she cannot drink milk with high fat. She buys yinqiao with low fat.

D: do you live with your grandma together?

P: yeah.

D: what kind of package is yinqiao?

P: box-packaged

D: is it also sold in a box?

P: yeah.

D: how often does your grandma buy yinqiao?

P: because she drinks this by herself, it takes quite long between two times. Nearly two months, she will buy the next time.

D: how much do you spend each time when you buy deluxe?

P: 69? 69-89 usually

D: does the price change sometimes?

P: deluxe has different kinds, like calcium supplementation or some other types. I am not very clear about it. Price is different.

D: how much is yinqiao?

P: seems to be around 50.

D: as for you, do you only drink deluxe?

P: let me think about it. After I came here, and the first time went back, my mom was still ordering the local delivery milk, but I could not get used to it. I think it taste bad, so I let my mom buy deluxe. They drink the local brand. I think the flavour of deluxe is good.

D: the milk you once ordered, does it have a brand?

P: no, it is produced and delivered from factory.

D: does your parent drink this milk?

P: en

D: as for you, if the price of deluxe increases from 60 to 65 will you still buy it?

P: I will

D: how much do you think you won't buy, if the price is too high? Such as 70 or 80

P: deluxe is already more expensive than the others. Its price range is from 69 to 89, so the highest price I can accept is 90. If the milk I usually buy was 70, this function can only set price at 70. I can understand if it increases to 80. If it changes to 90, equal to the highest price, I think there is no need to keep buying.

D: for people who did not drink deluxe, will you recommend it to them?

P: I will

D: how to convince them?

P: I will give them to taste it first. When I studied in china, I didn't have time to eat breakfast, I would bring bread and milk. Sometimes I brought an extra one, because there were many in my home. I would say this is good, and you can try it. Something like that.

D: why does your parent don't drink deluxe?

P: they drink it now, but they like drinking fresh milk. They think deluxe still has additive.

D: is the fresh milk cheap? P: it seems not so cheap.

D: how much is it? P: about 4 or 5 for two bottles. Basically, pouring into the pot, it will become be half full.

D: do you know any foreign brands?

P: I drank meadow fresh.

D: do you drink it when you are in china? P: I could not find it in china.

D: if your mom will go to the supermarket, will you let your mom buy milk for you?

P: I won't tell her which brand I want. I will only say there is no milk at home. She knows the fixed brand I drank.

D: other than deluxe, do you have replaced brand?

P: jindian

D: when will you buy it? When it is on discount?

P: maybe... (he thought for a while) during a period of time, because jindian belonging to yili, that period I think deluxe was too expensive, I want to find another brand which is cheaper. I bought jindian. After a while, there was news that yili milk had problem. I bought deluxe again.

D: but did you also see mengniu's milk had problem as well

P: I don't see them together

D: do you think deluxe and mengniu are separated brands?

P: I think their levels are different

D: do you think the price of deluxe is quite expensive? Is it value-for money?

P: as for drinking, I think it is the same for drinking any milk. But because there are many people living in my home, and their health is not good, I think it is good to buy assured products. It doesn't matter to pay more money.

D: do you think its nutritional value is higher? P: yeah

D: how many people are living in your family? P: my grandparents, parents and me, five people.

D: because we all know there are problems with mengniu and yili, do you still trust these companies? Do you think after problem exposed, the milk it produced is good?

P: how to say. I feel there is no normal thing in china, so it does not matter if I go back. They are all not healthy. After all things we usually buy and make, we cannot just abandon it. We still need to drink milk. If deluxe cannot be drunk, do you know how many problems the others will have.

D: do you think deluxe is a little bit more trustable, compared with the others? P: yeah

D: what the difference between deluxe and jindian, except for quality?

P: it tastes better.

D: what is the element that attracts you to buy? Even jindian is on discount, you may still want to buy deluxe.

P: firstly, it is the question of habit. Because we have bought deluxe for long time, we have the loyalty emotion. Besides, it represents a different level. When your income has reached this level, you should buy this kind of thing. Moreover, it does not have harm on your body, and it is helpful for you. Therefore, we always buy it. Another thing is it is a lot. It accounts for many market shares in the supermarket.

D: do you mean they are laid for large space in the supermarket?

P: yes.

D: except for supermarket, do you buy milk in other place? Like convenience shops?

P: maybe not, because the supermarket is opposite of my home.

D: have you tried to buy online? P: no

D: why? P: my home is opposite the supermarket, so why I have to let it be express delivery.

D: did you ever see exported commodity?

P: there is no exported product in normal supermarket. There is supermarket that only sells exported products, I know.

D: have you seen any foreign milk?

P: when I was in New Zealand, I was not at home. My mom once bought New Zealand milk. I forget the price that she once told me. It is barrelled, like the bottle we see here. She bought for twice. It seems one barrel is over 80, quite expensive. She does not buy it now. She said we cannot afford it.

D: because you study here, and you have heard about NZ milk scandal, do you think it has influence on your purchasing milk?

P: no. no matter what, it is better than Chinese milk.

D: now it is the table. Did you once buy soft-packaged milk?

P: once bought, when I was in primary school. I bought it in front of school, which was stored in hot water.

D: how long has your family bought deluxe?

P: about 7 or 8 years

D: did you start from the beginning of deluxe was sold?

P: almost. Like 12 or 13 years old

D: what did you think when you first drank it?

P: I feel it was very upscale. Because at first, all milk were packed in soft package. Suddenly, a new package of milk was packed in box. When you brought it to school, I felt very different.

D: can you see these kinds of packages (soft-package) in the supermarket? Does yinqiao only sell in your city?

P: I don't know. I feel they are sold country wide.

D: if you feel these words can be associated with the brand, you can write a tick

	mengniu	yili	deluxe	jindian	yinqiao
Fresh			√		√
Unpolluted					
Nutritious			√		
Trustable			√		
Cheap	√				√
High quality			√		
Tasty		√	√		√
Famous	√	√	√	√	
Convenient to buy	√	√			√
Attractive ads	√	√	√	√	
Pay attention to CSR		√	√		
leadership			√		
Value-for-money			√	√	√

D: do you think deluxe and jindian are not convenient to buy?

P: because these two brands are quite high-levelled among these brands, they are sold in big supermarket. The others are sold in newsstand and street vendors. Compard these brands

(he thinks high quality contains fresh and nutritious)

D: will you buy nz brand, after you go back home, if the price is not so high.

P: I will.

D: do you know many websites sell exported milk? Do you want to try? Because you drink good quality milk in New Zealand

P: to be honest, no.

D: do you think it is troublesome?

P: because I think babies ask for high quality milk, adults may not ask so high.

D: actually, comparing deluxe and exported milk, deluxe is more expensive than exported ones. Do you want to change mind?

P: just so troublesome

D: why don't you buy bagged milk?

P: it looks low.

D: do you not trust them?

P: we are not entirely buy deluxe, and sometimes may buy bagged milk as well. Buying deluxe has formed a kind of habit.

D: if we put 10 times, did you all buy deluxe for these ten times?

P: let me think. After that problem, we didn't buy any jindian. Sometimes someone gave gift, which is jindian. We also drank it.

D: do you buy deluxe as gift?

P: yes.

D: what is the most important factor of milk, in your opinion?

P: tasty

D: what do you mean by tasty?

P: sweet 😊 because I am not allowed to buy soft drink, I drink milk as beverage.

D: do you know there are 12 units in the box of deluxe?

P: it is 24?

D: if three of your families drink milk every day, will you finish by 4 days?

P: (shocked) no. He called his mother. His mom also does not know.

D: how do you drink a box for one or two weeks?

P: my family does not drink milk every day.

D: do you drink milk daily?

P: basically, I drink every day. we don't only buy a box of milk once. At least two boxes.

Is it really only 12 units? How it can be?

Appendix E: The Classification of Chinese Cities

First-tier cities	Beijing, Shanghai, Guangzhou, Shenzhen Chengdu, Nanjing, Tianjin, Hangzhou, Ningbo, Wuhan, Xi'an, Chongqing, Qingdao, Shenyang, Changsha, Dalian, Xiamen, Fuzhou, Jinan
Second-tier cities	Kunming, Suzhou, Zhengzhou, Changchun, Hefei, Nanchang, Ha'erbin, Changzhou, Yantai, Nanning, Wenzhou, Shijiazhuang, Taiyuan, Zhuhai, Nantong, Yangzhou, Guiyang, Dongguan, Xuzhou, Daqing, Foshan, Weihai, Luoyang, Huai'an, Huhehaote, Zhenjiang, Weifang, Guilin, Zhongshan, Linyi, Xianyang, Baotou, Jiaxing, Huizhou, Quanzhou
Third-tier cities	Urumqi, Lanzhou, Jiuquan, Sanya, Jiamusi, Ganzhou, Jiujiang, Jinhua, Taian, Yulin, Xuchang, Xinxiang, Zhoushan, Cixi, Nanyang, Liaocheng, Haikou, Dongying, Zibo, Zhangzhou, Baoding, Cangzhou, Dandong, Yixing, Shaoxing, Tangshan, Huzhou, Jieyang, Jiangyin, Yingkou, Hengyang, Chenzhou, Ordos, Taizhou, Yiwu, Shantou, Yichang, Datong, Anshan, Xiangtan, Yancheng, Maanshan, Jiexiu, Xiangfan, Changzhi, Rizhao, Changshu, Anqing, Jilin, Qinhuangdao, Zhaoqing, Xining, Binzhou, Taizhou, Langfang, Xingtai, Zhuzhou, Deyang, Mianyang, Shuangliu, Pingdingshan, Longyan, Yinchuan, Wuhu, Jinjiang, Lianyungang, Zhangjiagang, Jinzhou, Yueyang, Jining, Handan, Jiangmen, Qiqihar, Kunshan, Liuzhou, Yuncheng