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Point of Sale Marketing Strategies

RENOVA CASE STUDY

Mariana Pimenta Valério Salaviza Manso

Master's Dissertation

Business Strategy – *Estratégia Empresarial*

Supervisor:

PhD. José Manuel Fonseca

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*Two things are infinite: the Universe and human stupidity; and I'm not sure about
the Universe. – Albert Einstein.*

To the best man I've ever met. António Valério.



Author's Declaration of Originality

I declare that this thesis is my own work and has not been submitted in any form for another degree or diploma at any university or other institution of tertiary education. To the best of my knowledge and belief, the thesis contains no material previously published by any other person except where due acknowledgment has been made. I declare that I have read the student guide about plagiarism and disciplinary implications that could arise from non-compliance with regulations.

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ABSTRACT

Think about the products you repeatedly buy at the grocery store – toilet paper is probably a major item on the list, right? The European market for tissues, which includes the production of tissue paper, paper towels, toilet paper, and paper for industrial use, annually moves a turnover of around 10 billion euros a year. The European Tissue Symposium (*ETS*), an organization that brings together European producers, including the Portuguese *Renova*, estimates that the market will continue to grow at a rate of 3% per year and in emerging markets can advance more than 7% per year.

Low cost products are no longer an option for Portugal, since today other can produce them even at a lower price. As a *fast moving brand*, pioneer in launching innovative products – antibacterial kitchen roll, black toilet paper, and wet toilet paper, – *Renova* is perceived different in the market and able to create consumption patterns. The company accounts for a turnover of about 130 million euros, today is present in 60 countries with 600 workers and produces about 100,000 tons of paper per year.

This essay's focus is on the point of sale, nowadays undergoing a fundamental and strategic role in the retailers' actions, driving the creation of new retail concepts. Being one of the main contact bridges between the trademark and the consumer, it embraces direct implications on their mutual relationship. More and more companies are realizing the strategic importance of trade marketing operations. For *Renova*, producing an innovative, smoother and dermatological tested toilet paper is not enough; it's necessary for the market to recognize it.

Through a case study about an essential commodity available on a large scale in a mass market, this research findings demonstrate how point of sale strategies can be decisive during the purchase process when several and diverse competitors act in the same segment make almost impossible to compare prices on the spot.

Keywords: Trade Marketing; Point of Sale; Business Strategies; *Renova*;



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NOMENCLATURE

ETS – *European Tissue Symposium*

AMA – *American Marketing Association*

US – *United States of America*

ERC – *Efficient Consumer Response*

POPAI – *Point of Purchase Advertising Institute*

CAE – *Classificação das Atividades Económicas*

OCDE – *Organization for Economic Cooperation and Development*



INTRODUCTION

The upsurge of retail power in Portugal required a change of attitude from the industry. Now the focal point is in customers' relationship. In the recent past the major concern of manufacturers was restricted to the final consumer. But in the present days, more than ever, to ensure the success of a business or a brand is essential to know in greater detail not only each customer and buyer but also the point of purchase.

Due to the rising level of competition and the low differentiation between *perceived quality* in each product, it is extremely important to know the customer, its needs and values, along to understand *how he buys*.

With a marketing perspective and focusing on increasing success strategies, this study aims to understand company's performance at the point of sale: how it can either kill or add value to the product and where Trade Marketing becomes important boosting the brand efficiency.

According to Miranda (1997), the best-oriented companies start to regard and treat the retailer not only as a customer or market participant, but also as a fundamental component of the entire process of distribution. It is possible to integrate three approaches in Trade Marketing, (i) maximize the value offered to the customer (ii) ensuring the profitability in negotiations and, at the same time, (iii) reduce dependence on customers. Besides, Trade Marketing must also ensure that the established positioning strategies are preserved assuring brands visibility and attractiveness to consumers at the point of sale (Miranda, 1997).

This case study refers to a Portuguese company operating in the consumer goods industry for more than 56 years. It has been steadily increasing its market share, to finally achieve market leadership.

Nowadays present in more than 60 countries and operating as a brand that believes in the value of experience and emphasizes the relationship with the consumer at the point of sale, *Renova* is resetting the tissue paper values in the market. Its strategies have been asserting themselves as powerful winners.



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PART I

LITERATURE REVIEW



CHAPTER I

1. WHAT MARKETING IS...

... All about. According to the American Marketing Association, July 2013, *Marketing is the activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large* (AMA, 2013). But we came a long way to get here.

The English word originates from a few Latin words, as *Mercatus*, the place of purchase and sale; *Mercari* (verb) to negotiate, make buying and selling; *Merx*, object to negotiate commodity. Some Brazilian authors even tried to translate it to Portuguese as *Mercadologia* (Richers, 1986) or *Mercância* (Gracioso, 1971).

From the actual point of view, it is important to contemplate the consumer's behavior, strongly influenced by the point of sale; the power and influence of retailers, which concentrates the economic strength; marketing actions that aim to fortify brand image in consumers' minds and the industry itself, which, significantly increases the amount and variability of products and brands, i.e., competitors.

Studying European retail, Toledo, Neves & Machado (1997) state, "*Between manufacturers and retailers there are several forces that affect the industry power balance, which currently belongs to the retailer.*" Thus, Trade Marketing aims to maximize the value offered to the consumer, ensuring profitability and, at the same time, reducing the dependency and risk on customers (retailers). From a Marketing perspective, Trade Marketing should also guarantee that strategies are preserved at point of sale, in order to become products and brands visible and attractive to consumers.

Marketing is a new terminology of a practice, whose origins date back to the beginnings of exchange and trade (Motta, 1983), when individuals began to reflect and apply these behaviors. Already Greek philosophers such as Plato and Aristotle discussed markets, trading activities and traders. The contemporary concept of marketing combines a planned, structured and satisfying long-term win-win relationship, in which individuals and parties obtain their desires and needs.

However, was the original use of the term 'marketing' merely an application of a new name, to an old practice? Bartels (1988) places the birth of Marketing as a subject between 1902 and

1905, when five American universities began to offer courses on the subject, (Chauvel, 2001). Most analysts agree that Marketing arose as a branch of ‘applied economics’.

Facing the ‘Trade Era’ when production consisted of limited handmade goods and generally traded through exploration, over the years, the development and enlargement of the marketing concept has been following the changing and dynamic context of business world. It has not always been considered essential, but due to market changes, increased competition and consumers becoming increasingly demanding, marketing acquired a bigger importance in the industrial environment. In the early twenty-first century, considering customer needs is inherent to any business.

Before 1920 *"a good product sells itself"*. The biggest concern was about the design and production of goods and services, dismissing the relationship with consumers (Boone & Kurtz, 2006). Everything that was produced was sold. The result was a non-existent marketing market (Cobra, 2002). Those were the times when Henry Ford, a remarkable industrialist, develops and innovates the assembly line, considering that *"people can have the Model T in any color—so long the it's black"*. An era closed with the Wall Street Crash, where goods were no different from each other, focused on labor intensity with low payments and production efficiency based on cost control, productive planning and rational distribution (Cruz, 2011). The major question for companies was to produce and sell: *"if somebody makes a product, somebody else will want to buy it"* (Kotler & Prentice Hall, 1997).

This offer-driven economy was followed by a period where *"Customers will only buy what truly meet and satisfy their desires and prove higher utility or added value from all the present and available in the market offers."* Along this new view in the business world, as well market research marketing function is developed in organizations, revolving companies’ approach into an outside-in strategy, finding on the market the answers on what to produce (Cruz, 2011).

Entering a new cycle, the Sales Orientation Era is defined by the organizational commitment on the development and creation of new jobs, the incorporation of demand in the flow of production process, allowing a leadership policy for costs: invests in stocks composition.

Simultaneously a new function emerges: the seller. Sales volume and market share is a new market dimension with increasing importance to the company. The distribution system "value chain" is developed and advertising and sales promotions suffer a considerable boost (Cruz, 2011.). Looking forward to future purchases, the purpose is to fully satisfy the consumer.

“Myopia is a vision condition in which close objects are seen clearly, but objects farther away appear blurred” (Harper, 2000).

Levitt was a catalyst in market innovation when companies were undergoing a transition from sales to a new market orientation. Resulting in company’s failure by not properly adjust to constant market variations, marketing myopia is a short-sighted and inward looking approach to Marketing, focusing on the company and dismissing consumers' needs and wants (Levitt, 1960).

Bartels (1974) reveals an evolution to Marketing Management between the fifties and sixties, represented by the transformation of the marketing manager as an operational *ingredient mixer* to a *marketing mixer*.

In 1964 Neil H. Borden published his article ‘*The Concepts of the Marketing Mix*’ and later E. Jerome McCarthy grouped those basic concepts in four categories: Product; Price; Promotion; and Place (Needham, 1996), the presently known 4 P’s.

Las Casas (2008) divided the history of marketing in three eras: the Production Orientation Age, emphasizing the product; the Sales Orientation Age, intensifying production processes; and Marketing Orientation Age, when demand overpasses supply.

Table 1 – Marketing Eras

Era	Time	Behavior
Production Orientation	Before 20’s	"A good product sells itself";
Sales Orientation	From 1920 to 1950	Advertising and creative sales fights consumers’ resistance and convinces them to buy;
Marketing Orientation	Second half of 20 th century	The consumer is king. Each Company must seek needs and desires and satisfy them.

Source: Adapted from Las Casas (2008)

A competitive advantage for companies, in today’s highly competitive and turbulent markets, is to have long-term healthy relationships and customers. The pursuit of building and maintaining a long-last profitable relationship with customers has been a growing trend (Kotler, 2000).

Gordon (1998) sees it as a result of high competitiveness born from 'new' similar technological products and lower prices reaching the market every year. A long-term orientation relationship



between buyers and sellers is crucial in to two key factors: mutual dependence and extent trust, according to Ganesan (1994).

Also for McQuiston (1997) and Handfield & Bechtel (2002) trust is essential in establishing co-operative relationships. A strong relationship is based both on attracting the customer and then building it up (Grönroos, 1994). A marketing relationship needs to be sustained by some fundamental principles: mutual value creation, trust, and commitment. According to Morgan & Hunt (1994), *“Trust exists when one party has confidence in the exchange partner's reliability and integrity.”*

Relationship marketing emerges from the intention of merging consumers and businesses as one, aiming to develop a connection that will last as long as possible (Santos et al., 2010). Marketing relies on network relations, (Gummesson, 2005) providing actions or processes through cooperation, resulting in long-term benefits (Morgan & Hunt, 1994). In this relationship customer need to be seen first of all as an individual, then a member of a community and finally a single number in the mass of a market percentage (Gummesson, 1998).

As long as the level of satisfaction is high, higher is the likelihood of this customer or consumer, to remain loyal to the company or the brand. The purpose of relationship marketing is to achieve high levels of customer satisfaction through the collaboration of all the parties involved (Payne et. al, 2005).

Authors such as Don Peppers, Martha Rogers & Philip Kotler preserve the importance of creating ties: *“It usually costs five times more to attract a new customer than to keep an existing customer satisfied. As a result, organizations are placing increasing emphasis on identifying and managing profitable relationships with customers”* (Kotler, 2000).

Following the ‘4 P’s’, the ‘4C’s’ concept was introduced in the 90’s by Robert F. Lauterborn who proposed a more customer-driven replacement – Consumer; Cost; Communication; Convenience (Needham, 1996).

In 2012, a new ‘4 P’s’ theory was relaunched – People; Processes; Programs; Performance. (Kotler, 2012).

Later, Societal Marketing appears. It sustains an evolution of customer orientation in companies, asserting needs, wants and target, providing value by maintaining or improving people and society well-being. Organizations start to look to social responsibility as one of the fundamental aspects of management, influencing buyers decision process (Melo, Neto &



Froes; 1999). This approach is driven through growing consumer awareness on the environmental short-term impact of mass consumption (Melo, Neto & Froes; 2001).

Now the time has come to consider how much Marketing has changed in the last century, and how much it will continue to.

As markets expand and new marketing platforms emerge its theory and practice are minutely transformed. What today's is considered to be the fastest way to reach customers might be obsolete tomorrow.



CHAPTER II

2. BRAND MANAGEMENT

Brand Management is understood as the analysis and planning on how brands are perceived and valued by the market. In 1991, David Aaker stated that one of the aspects that distinguished modern marketing from the 50's is the new appeal consumption beyond the classical functions.

Hislop (2001) defined branding as the process of creating a relationship or a connection between a company's product and an emotional perception of the customer. Its purpose is to generate segregation among competitors and build loyalty among customers. Later Kapferer & Keller (2004; 2008) stated it as an accomplishment between customer expectations and consistent satisfaction.

Through brand equity, in a world increasingly homogenous, brand management bets on a unique brand identity strategy, capable to turn brand value in something higher than the actual product.

2.1 BRAND EQUITY

Brand Equity is a marketing term, which describes the intangible value of a company or a brand, based on consumers' perception. A product with a well-known name is valued higher than products with less well-known names. (Aaker, (1991); Keller, (2003); Leuthesser, L., C.S. Kohli and K.R. Harich (1995). Ailawadi, Kusum L., Donald R. Lehmann, & Scott A Neslin (2003)).

Brand Equity is related to the fact that a brand is able to get different results from those that would be obtained if the same product or service didn't have that specific brand (Keller & Machado, 2006).

Some researchers (Neumeier, 2006) say that brands are one of the most valuable assets that a company can hold. They include visual elements; brand language associations. Quality perception of a brand is developed through strategic investments in communication channels and market education. It aims appreciation over time and long-term return on investment. Brand equity increases companies' financial value (Grannell, C. 2009), and can be measured by cash flows increments it produces (Farquhar 1989).



Pappu, Quester and Cooksey (2005) sustain that brand equity can be classified in two categories: a financial perspective, first, (Brasco, 1988; Shocker and Weitz, 1988; Mahajan et al, 1990; Simon and Sullivan, 1993) and, secondly consumer's behavior (Aaker, 1991; Kamakura and Russell, 1993; Keller, 1993; Rangaswamy et al., 1993).

Farquhar (1989) and Crimmins (1992) argue for a customer based brand equity measurement. From their point of view it only will have value to the investor, manufacturer and distributor if it means value to the consumer (Cobb - Walgren et al. (1995). Consumers' knowledge about a brand also controls how producers along with suppliers and advertisers, market the same brand. (Keller, (1993) Lassar, W., B. Mittal and A. Sharma (1995).

Brand equity is differently defined by Aaker (1991) and Keller (1993). Both of them take a consumer's perspective, based on memory association. Considering brand awareness and brand image, Keller (1993) refers to brand equity as the effect that *knowing a brand* produces on consumer's mind. On the other hand, for Aaker (1991) brand equity is a set of assets and liabilities connected to a brand, its name and symbol (logo) that are able to add or subtract value to a product or service. Brand awareness, brand associations, perceived quality and brand loyalty are the four most important dimensions involved in this concept.

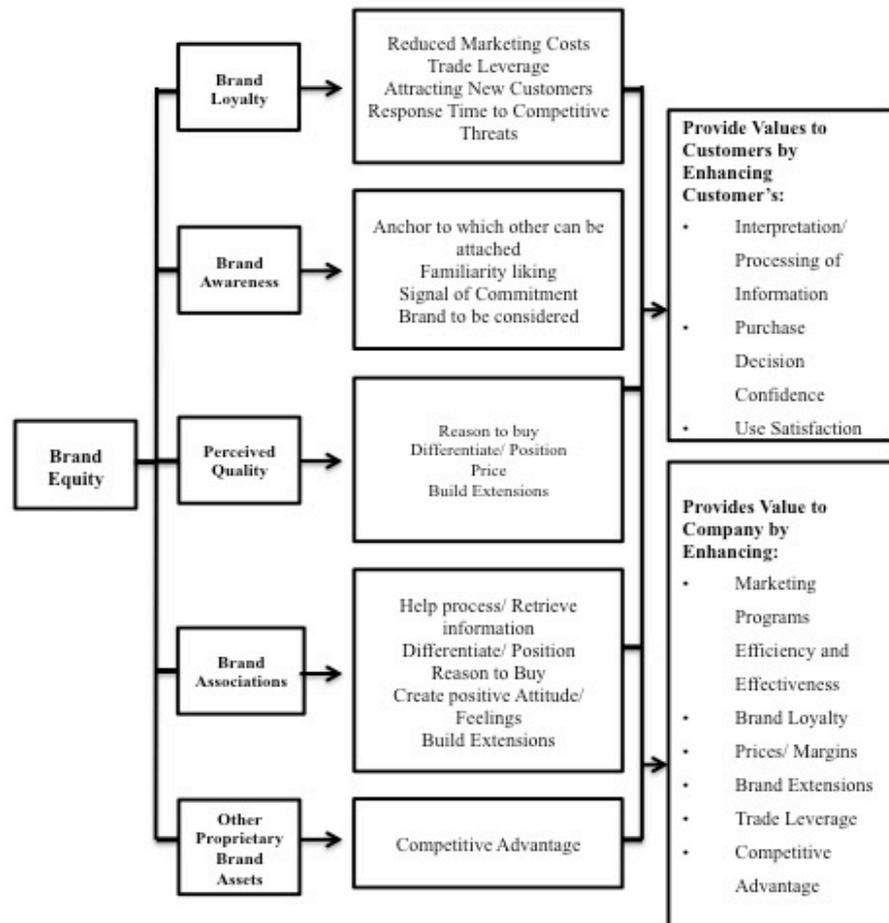
Thought strategically crucial brand equity is difficult to quantify. There are certain tools to analyze it, but no general agreement in measuring it.

Several measurement methods have been suggested to brand equity based on the market or on consumers (Srinivasan 1979; Kamakura and Russell, 1989, 1993; Swait et al 1993;. Aaker 1996), but a challenge relies between quantitative and qualitative equity values: Quantitative brand equity includes numerical values such as profit margins and market share, but fails adequately to capture qualitative elements as prestige and associations of interest.

2.1.1 David A. Aaker Model

Aaker (1998) built and developed his brand equity model based in five dimensions: loyalty, knowledge, perceived quality, brand associations and other assets, as shown in next pages.

Figure 1 – How brand equity creates value



Source: Adapted from Aaker (1998)

How brand equity creates value

Brand loyalty:

For Aaker (1991, 1998, 2007) is how consumers react when, and especially, competitors change somehow they're own products, either in price or in its features. For this author, brand loyalty increases when, facing competitor's actions, customers vulnerability decreases. Being so, loyalty is an indicator of brand equity clearly connected to future profits and sales (Aaker, 1991, 1998, 2007).

Brand awareness:

According to the same author (1998) it is the ability of a potential buyer to recognize a brand among a certain category of products.

Perceived quality:

It is defined as customer’s perception of a product or service to be superior when compared with its alternatives (Zeithaml, 1988), delivering more satisfaction and value. Kotler (2000) and Kotler & Keller (2006) connect product/service quality, customer satisfaction and profitability.

Brand association:

An image in memory. For Aaker (1991, 1998, 2007).

Brand associations can be seen as specific memorized shapes or product features (Chen, 2001). Its importance aims to create value through differentiation (Rio et al. 2001).

As basis for purchasing decisions and loyalty, high brand equity implies strong and positive brand associations.

2.2 LOYALTY VS. SATISFACTION

According to Reichheld (1996), the major difference between satisfaction and loyalty is the ability of companies to turn purchases in regular activities. A loyal customer is characterized by regularly purchase the same product or brand, has a greater chance and role in spreading the consumed products/services consumed to his circle of relationships. He also feels immune to competitors’ pressure and has the capacity to face and tolerate any problems that occasionally can arise, without abandoning his choice (Griffin, 1998).

Oliver (1999) develops a model that extends a loyalty cognitive-affective-conative sequence, including an observable behavior purchase. At each loyalty stage, different factors can be detected.

Table 2 – Loyalty stages

1 – Cognitive Loyalty	Loyalty to information such as price, benefits, quality (features) etc.
2 – Affective Loyalty	Loyalty caused by affection: "I buy because I like the product." Supported by satisfaction engagement, preference and cognitive consistency.
3 – Conative Loyalty	Loyalty as an intention: "I am committed to buy." Supported by commitment and cognitive consistency.
4 – Action Loyalty	Loyalty as inertial action, associated with overcoming obstacles.

Source: Adapted from Olivier (1997, 1999)

As reported by Grönroos (1993), prior to loyalty are satisfaction, trust and commitment.

Satisfaction positively influences future repurchase intentions; *Trust* offers a consistent and



competent company performance guarantee, ensuring that consumers will continue to obtain value every time they buy; *Commitment* means that whoever is involved is motivated to do business.

A brief definition about satisfaction is conceived by Fornell et al. (1996), determining it as a result of the customer expectations about the performance of a product, service or brand. Further, it is a post-consumer opinion about the selected alternative, meeting or exceeding expectations (Engel; Blackwell; Miniard; 2000). On the other hand, there is *dissatisfaction*: The outcome of negatively confirmed expectations.

Over the past decades, satisfaction and loyalty have developed an affair. Researches have been flourishing about the effect of satisfaction on client's loyalty. Satisfaction is regarded as a key factor, in long-term relationships, between companies and customers (JAP, S. D. 2001). However, only this is not enough on achieving long lasting effects Reichheld (1996).

Despite satisfaction being an important footprint on fidelity, it can be achieved through other mechanisms in the way, as personal determination, social links, competitive pressures and changing barriers. Oliver (1999) defends even though *Satisfaction* and *Loyalty* are closely related. A loyal customer is usually more satisfied than non-loyal and only satisfaction does not guarantee total loyalty. Satisfaction is able to develop a loyal behavior when a brand preference becomes successive.

CHAPTER III

3. TRADE MARKETING

3.1 THE TRADE MARKETING CONCEPT

As for the literal source of the *Trade Marketing* term, there is no uniformity; authors are divided between different dates and places. However, there is a general opinion about the concept being relatively young. Born in business practices during the 1980s, in US multinationals and then embedded in business, companies started referring to it as the interaction of sales functionalities linked to the marketing department, aiming to strengthen trade relations with distributors (Walters & White, 1987).

Early in the 90's, Trade Marketing contemplated each customer as a market and its main purpose was to maximize involvement and profitability in each client individually (Davies, 1993 & Alvarez, 2008). Following, Benoun & Héliès-Hassid (1994), support that the term has emerged when relations between manufacturers, distributors and customers were changing. According to Gonzales (2007) the verbalism *Trade Marketing* derives from the Anglo-Saxon term *trade* as a business activity. In the US, it is also known as partnering. Others rather denominate it as the *distribution marketing*. During the purchase process it is also important to recognize the independence and influence customers might have in the final consumer and vice versa. (Alvarez, 2008; Toledo et al, 2007; Arbache et al, 2011.; Almeida et al., 2012)

Recent theories indicate the *Trade Marketing* expression may have been erroneously used by some companies, considering it as just a set of promotional and communicational tools at the point of sale (Arbache, 2011). A broader concept was defined, setting a partnership model between manufacturers and distribution channels, in order to reach the consumer by connecting products, logistics and marketing strategies. *Colgate-Palmolive* in 1980, assimilated commercial and marketing departments as one, to have a closer relationship with distributors (Castillo, 2000; Domenech 2000; Santesmases, 1999). The American company Procter & Gamble focused on a trade marketing strategic alliance with *Walmart*, reducing costs, accepting rotation and marketing activities at the store level (Lira, 2001).

As a response to this new business scenario, it was necessary to have a different approach when dealing with the distribution channel: The point of sale could no longer be understood as a tractable variable, but should be given a personalized treatment, as good or even better than the one that was offered to consumers.

Following the growing importance of the point of sale, marketing departments of suppliers industries began to realize that they weren't sufficiently prepared to face the emerging challenge between traditional marketing and consumer behavior (Alvarez, 2008). To a better profitability, Trade Marketing started to perform together along with other departments to develop product attractiveness in retail outlets. Corstjens and Corstjens (1995) emphasize *B2B Trade Marketing* establishing three main challenges: maximize the value offered to retailers - these would buy the products in order to resell them and the purchase decision process would be taken from the economic principle, profit; ensure that all activities are built to have a reliable profit to the industry; avoid the dependence risk.

However, according to Alvarez (2008) in the most cases, the Trade Marketing department or area was constructed empirically, as intention to fill certain business lacks in different companies. Castillo (2000) argues that, since the beginning, the concept was undergoing through a evolution process, distinct by three stages:

- Initial Trade Marketing: the manufacturer implements marketing operations within the point of sale. Clients adopt a passive posture.
- Interactive Trade Marketing: customers become channel commanders. Not only as buyers, but also as manufacturers contributors, in the development of marketing activities.
- Trade Strategic Marketing: ensure long-term healthy businesses relationships. At this stage, there are movements like Efficient Consumer Response (ECR), aiming to standardize processes across industries increasing efficiency in operations.

Alvarez (2008) reveals another line in *Trade Marketing*, including five phases:

- Sales: focus on supporting the sales branch, only meeting customers' demands with the company's sales department.
- Marketing: focus on supporting point of sale marketing activity through promotion and merchandising.
- Customer: These begin to interact more effectively with marketing and sales areas, developing activities benefiting the industry and its trading partners.
- Financial results: Focus on improving financial results to both hands – company and customer.
- Business development: seeks to develop new businesses based on consumers' interactions within retail outlets.

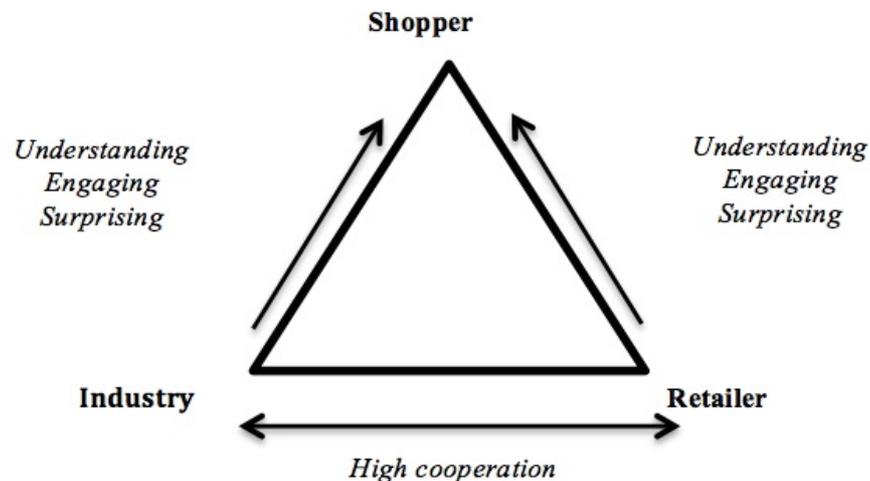
Silva Neto, Macedo-Soares & Pitasi (2011) estimate that both Alvarez (2008) and Castillo (2000), present Trade Marketing as an area that primarily used to be focused on operations, and later due to developed strategies in corporate business, has evolved into an area with a strategic focus.

Kotler (1993; Dupuis and Tissier-Desbordes, 1996) identifies five fields that cooperate along with trade marketing:

- *Brand*
- *Logistics*
- *Information*
- *Merchandising*
- *Promotion*

In this way, Trade Marketing produces seamlessly with marketing, sales and retail in order to produce attractiveness at the point of sale. Therefore sales can be generated with higher profitability (Alvarez et. al 2007).

Figure 2 – Retail interface, industry and shopper



Source: Adapted from Prado (2012)

Trade Marketing seeks to relate the shopper, the moment of purchase, the industry and the distribution channel. (Prado, 2012). Through the use of information and knowledge on customers' behavior, the opportunity of creating advantageous actions along with retailers has emerged. (Markus Stahlberg & Ville Maila, 2012). It is then possible to relate sales with customers, *Trade Marketing* with shoppers and marketing with final consumers.

Figure 3 – Trade Marketing relations



Source: Adapted from Alvarez, 2008 (p.74)

The spotlight of *Trade Marketing* is the Shopper (Sponton 2008). The shopper has a major role and importance in the purchase process, whereas 76% of the purchase decision takes place at point of sale (POPAT, 2012)

The consciousness of the existence of a *Trade Marketing* function in organizations, points to a new breed of relationships with the intention of increasing medium-long term profitability (Dupuis & Tissier-Desbordes, 1996). Depending on the scope of its activities, the Trade Marketing manager should have a multidisciplinary vision and the ability of develop strong social interactions and negotiations. A *TD Manager* is in charge of several responsibilities related to product (exhibition); promotions and sales campaigns; point of sale (materials); logistics (inventory turnover, production schedules); finances and sales administration (profitability margin); customer's behavior and prices (Morales, 2000; Kotler, 2002). Further, it has a major role in problem solving; avoids conflicts, seeks harmony and long-lasting relationships (Morales, 2000).

3.2 TRADE MARKETING MIX ELEMENTS

Trade Marketing intends to optimize the relationship between retailer and final consumer. A new strategy on *marketing mix* was developed based on the *Four P's* elements.

Davies and Randall have different approaches:

Table 3 – *TD Marketing mix elements*

Davies	Randall
Product	Product
Price	Price
Promotion	Promotion
Market Share	Place – Point of Sale
Sales	
Service	
Results & Profitability	

Source: Processed by the author adapted from Davies (1993 & Randall (1994)

Davies (1993) includes sales; service and results; and profitability as mandatory elements having an ongoing broad brand vision beyond the importance of consumers' product perception. Suppliers influence level on retailers, simultaneously. Trade Marketing is also concerned about the retailer's performance in evaluating products adjustment in trade policies, retail outlet demand, product design, product profitability and shelf life (Davies, 1993). Randall (1994), on his side, restricts to *Four P's*.

Trade Marketing mix elements enable companies to apply and develop market policies driven to the final consumer, their selected target (Davies, 1993).

Consumer behavior, then, strongly influenced by point of sale and retailers, must be contemplated. That's why marketing actions aim to fortify brand image in consumers' minds.

3.3 CONSUMER BEHAVIOR

Studying European retail, Toledo, Neves and Machado (1997) state that:

"Between manufacturers and retailers there are several forces that affect the power balance".

Consumer behavior is one of the most significant topics in marketing. It understands purchasing decisions that marketers and managers draw marketing-mix strategies and develop new products.



The nature of being market-oriented rather than product-oriented requires organizations to consider who their (best) customer might be, where they are and 'what they really want' (Evans, M.; Jamal, A.; Foxall, G.; 2009). There are cultural, social, personal and psychological factors that characterize consumers in different categories and levels. They also help to understand how each branch behaves and how affect preferences and decisions. Vieira (2004) stresses that.

Consumer behavior includes mental, emotional and physical aspects. During selection and purchasing processes individuals choose products and services that might satisfy their needs and desires (Kotler, 1999).

According to Schiffman & Kanuk, (2000), *"perception is the process by which an individual selects, organizes and interprets 'stimuli' received from abroad in order to create a coherent picture of what surrounds it. Our sensory receptors interpret sensations as 'stimuli': light, color, sound or smell coming from abroad"* (Solomon et al., 2002).

Consumer behavior establishes reference points for management and marketing strategies to be followed. It provides a chronological and holistic view of clients over time, revealing the dynamic customer trilogy company-client-organization. It also provides the possibility of anticipating trends and is focused on consumer, allowing discovering new needs, products, services or reclaimed experiences. In a complex, unstable and overloaded market, understanding consumer's behavior turns out to be an advantage of proper market segmentation.

Point of sale actions trigger impulsive consumption that leads to buy even not only what is needed but what individuals are motivated to choose. Blesa (2010) states that 85% (!) of world purchase decisions are taken at the point of sale. This way, consumers are shown to be highly vulnerable to brand switching.

From this comes that the way store environment and atmosphere is organized to attract consumers and purchases must be in accordance to behavior consuming process: how potential clients act inside the store, where they go, where and how they get around, what they look at, what they read, and so on.

CHAPTER IV

4. POINT OF SALE

4.1 POS OR POP?

POS (Point of Sale for customers) or POP (Point of Purchase for retailers and marketeers) is where business takes place, either physically or virtually, where premises expose services or products (Blessa, 2010) and allows a complete set of experiences.

It is where retailers and manufacturers use strategic techniques to optimize their sales. Nowadays few people focus on shopping lists. Most individuals probably walk through behind a product what becomes a challenge and opportunity (Blessa, 2010). Along with this, visual communication has a great importance since the eyes are the first responsible for the selection process, being the key to attract attention, pass the message and influence the client's buying process (Blessa 2010).

Measuring the perception of the five human senses *Veronis, Shler & Associados* (Apud Blessa, 2010) state:

"... 1.0% by taste; 1.5% by touch; 3.5% by smell; 11.0% by hearing and 83.0% by sight".

Retail marketing is based on communication strategies and product placement that avail techniques and methods, in order to motivate and influence consumers purchasing decisions.

4.2 MERCHANDISING AT THE POINT OF SALE

Traditionally, merchandising was conceived as a way to motivate the purchase with the highest benefit-cost ratio.

According to the American Marketing Association: *Merchandising is a wide term that encompasses promotional activities run by the manufacturer in the form of special presentations that take place within establishments, as well as initiatives run by the retailer to make the product stand out. In any case, merchandising refers to commercial actions at the point of sale aimed to stimulate customer's purchases as soon as they enter the establishment.* (Buttle, F. 1984))

For Peter Drucker (apud Kotler, 1998) the marketing goal is to "*know and understand the customer so well that the product or service that fits him will sell itself.*"

Souza (2000) mentions that merchandising is planning and implementing activities that take place in shops, mainly in retail stores, aiming to expose properly and create buying impulses in consumers' mind and achieving more profitable operations in all marketing channels. Further, Kotler (2002) defines it as the activity that seeks to track a product development, from its suitability toward the point of sale (image, packaging, shopping, price, volume and promotional materials) to control its marketing performance in consumers mind.

Likewise, Blessa (2010) argues that merchandising is a set of techniques, actions and promotional materials applied at the point of sale to provide information and product, service or brand visibility, with a motivational purpose of influencing the purchase decision. Wherefore is strategically to increase public awareness.

POS (or POP) is where client has the opportunity to interact with the product, the place where must be created a pleasant environment to purchase. To this, visual communication, lighting, colors, layout, displays, music and smell must be developed in order to stimuli and release emotions and sensations. The in-store atmosphere must be perceived as a psychological feeling refined by the retailer and understood as the store's personality (Parente 2000).

All advertising and promotion actions converge to a single point: the point of sale, place where products should be strategically positioned bearing in mind its category, exposed amount, location, public visibility and access, together with the POS materials such as displays, banners, posters and stickers to enhance full potential to seduce customers (Sant'Anna 1998).

"... the POS materials are the main weapon of an advertisement campaign." (Blessa, 2010)

In the long term, merchandising could be considered the sum of promotion and materials, at the point of sale in order to control, acclimatize and promote brands, products or services to customers.

4.3 PRICING

Finally price is usually considered as a quality indicator on a product. Aaker (1998) refers that price tends to be a quality cue whenever other product information's are not clear for consumers.

Thought Cardoso & Alves (2008) conducted a study sustaining that a large majority of inquired consumers *do not consider price as a good indicator of quality*, most authors differ.



For Sawyer & Dickson (1984), for instance, low price and generic brands are associated to some negative product aspects, that is low quality. Wolinsky (1987) also argues that there is a direct and negative relationship between distributor's brands and consumers who consistently associate lower prices to low quality products.

Hoch et al. (2002) also refer that most of retailers and consumers, identify distributor's brands as low-priced products and inferior quality.



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PART II

EMPIRICAL STUDY

CHAPTER V

5. METHODOLOGICAL FRAMEWORK

This chapter describes the methods applied in researching this discussion, in order to meet the set objectives. The main purpose of this work is to answer a research question, by a case study, adopting a qualitative methodology, using the interview as an information gathering technique for an exploratory study.

The published literature is an important resource for the researcher in planning, implementing and in the dissemination of research results (Coutinho, 2011).

5.1 CONTEXT DEFINITION AND RESEARCH QUESTION

To achieve the aim of this study - understanding how variables such as loyalty, satisfaction and customer relations are developed at point of sale and how it influences customers' purchases – a research question, based on the literature review, was established:

The adopted strategies at point of sale positively influence brand visibility and turn it into the brand of choice.

The formulation of hypotheses is an opportunity to try to answer the problem raised in this study. For Luna (1997), the formulation of hypotheses is almost unavoidable, and those who are researchers such as Gil (1991), endorsed that a hypothesis can be formulated from different sources, such as observation, results from other researches, theories and intuition. To contextualize, three discussion points are introduced:

- The Trade Marketing area is essential in a company engaged in the consumer goods industry;
- The Point of Sale is able to influence loyalty behaviors;
- How Point of Sale Operations can influence the purchasing process;

Thus, these points correspond to the purpose and objectives of this research, i.e., recognize (i) the importance and performance of Trade Marketing, (ii) the concept of loyalty and satisfaction and (iii) The importance of branding at the point of sale.

5.2 CASE STUDY

The case study selected to accomplish this research was the Portuguese private company *Renova - Fábrica de Papel do Almonda, SA*, which develops its activity in consumer products production and marketing, with the following Portuguese official classifications:

- Sanitary paper products production (CAE 17220)¹. This classification covers produced paper, such as facial tissues and handkerchiefs, table napkins, toilet paper, paper towels, disposable diapers and sanitary napkins and tampons.
- Paper and cardboard manufacture (CAE 17120), a wide range of products made from cellulose fibers, predominantly recycled fibers, including mineral fillers, with different properties depending on the purpose for which they intended (writing support, copying, printing and packaging material).

This case study is only addressed to toilet paper. Being an essential product today, it is subject of constant innovation in mature markets.

When asked, in 2010, about the most important attributes of toilet paper,

60% of Portuguese consumers mentioned price, 30% quality, 8% the brand, and 2% the format. In terms of quality, the three most important attributes mentioned were softness, strength, and absorbency. 55% of Portuguese consumers reported checking the price of toilet paper on the shelves before making their choice, whereas 35% said that they do not check the price beforehand. 46% of Portuguese consumers said that they take between 15 and 30 seconds to choose their toilet paper, with 28% taking less than 15 seconds, and 24% taking between 30 seconds and one minute. (Seabra de Sousa, 2010)

Pulp, Paper and Cork sector is one of the most dynamic in the Portuguese economy, accounting for around 7% of foreign sales. It one of the main ambassadors of Portuguese products (Portugalglobal. 2015)

As a tissue paper market leader *Renova, SA*, with almost 70 years of existence, exports for more than 60 markets, mostly OECD countries. The company assigns strategic importance to emerging markets namely those, such as Russia, South East Europe, Angola and North Africa, where it is already present. In the last decade the company turnover grew more than 60%, hitting about 130m million euros last year.

¹ CAE – *Classificação das Atividades Económicas*

One of *Renova* landmarks implementation in the international scene has been the black toilet paper and its line of associated products – *Renova Black*. Easily, this brand managed to get more than five hundred press records. New York Times advertised this toilet paper as a *trendy item*. (See Appendix I)

With successful results, *Renova* is present in 60 countries, employs 600 workers and produces about 100,000 tons of paper per year.

Given the importance of the company in terms of quantitative and qualitative results, *Renova* proves to be a viable case study for the context problem in this thesis.

5.3 INTERVIEWS

The selection of these study participants was for convenience, as follows:

- *Renova Head Marketing*, Portuguese, has been with the company since 1980 and in this position for 18 years.
- *Renova Brand Manager*, Portuguese, has been with the company for 16 years and in this position for 14.
- *Renova R&D Innovation Manager*, Portuguese, has been with the company for 17 years and in this position for 10.

Interviewing people with different degrees of responsibility allows a broad vision of the company and its operations. *Renova Head Marketing* was qualitative interviewed. *Renova Head Marketing*, *Brand Manager* and *Renova R&D Innovation Manager* were submitted to an interview survey.

This selection of participants serves the study purpose. Also note, as per Triviños (1987) qualitative research should not worry about the number of participants. These are intentionally chosen considering a certain conditions.

5.4 DATA COLLECTION METHODS

5.4.1 Qualitative Interview

This methodology and approach allows getting direct answers and more complete information (Lessard, Goyette & Boutin, 1994; De Ketele & Rogiers, 1999; Quivy & Campenhoudt, 2003) extending the investigation scope.

To Haguette (1997) an interview is a social interaction between two people - the interviewer and the respondent - in which, one of them is aimed to obtain information from the other.

For this research of a qualitative nature, it seemed appropriate to use the interviewing technique in the semi-structured mode, justified by its potential. It can refocus the interview's direction due to the utterances and reactions of respondents (Bardin, 2004); and on the other hand, not all the interviewer's interventions are predetermined (Bisquerra, 1989; De Ketele & Roegiers, 1993, 1999; Fox, 1981).

An interview guide was developed, addressing general questions about the company, its market conduct and performance, as well as questions directed at the point of sale. Incorporated questions directed at the domestic and foreign market; the relations between company departments; the relationship with distributors and retailers, as well as the strategies adopted; point of sale positioning; the customer relationship addressing the variables satisfaction and loyalty at the point of sale; competition, competitors and strategies; social responsibility; point of sale operations; and about the purchase process. (See Appendix II)

5.4.2 Interview Survey

This method allows to gather information on several specific aspects, using closed questions in a short time period. The purpose of conducting a personal interview survey is to explore the responses and to capture deeper information. According Carmo (1998), the interview survey should serve cases, among others, where the researcher wishes to obtain private brand information.

This survey included questions relevant to the study as the motivation for the adoption of Trade Marketing in the company and Trade Marketing operations and assignments. There were 26 questions with the response format of *yes / no*. (See Appendix III)

5.5 PROCEDURE

A semi-structured interview and its previously prepared script were the instrument used to collect data. The speech is sequenced by parts whose order is somehow suggested. In these types of interviews there are some reference points targeted at the objective to be achieved, but there is a moderate orientation. These interviews were recorded, transcribed and subjected to content analysis. The questions were comprehensible phrased in such a manner that those interviewed could easily understand what was being asked.

Data were collected between May and early June of 2015.

5.6 DATA PROCESSING

During the process several questions of the interviews were applied equally to different interviewees, aiming to obtain more information and more consistent results.

In the several steps of this information process content analysis was an essential technique used to analyze and organize data. Besides that, it was also considered that in qualitative methodology a categorization matrix is critical to turn the results easily understandable (Anguera, 2001).

This procedure consists in a set of communication analysis techniques that, through systematic procedures and description of contents, aim to obtain quantitative and qualitative indicators that allow the inference of knowledge. (Bardin, 2004, p.37). With the categorization matrix all data is reviewed for content and coded for correspondence or exemplification of the identified categories (Polit & Beck, 2004). Thus categorization matrix can be regarded as valid if categories adequately and accurately capture what was intended (Schreier, 2012).

In the discussion phase, results are described by the content of each category.

Initially preceded by a brief reading that, according to Bardin (2004), is crucial to establish contact with the documents to analyze, get some guidelines and understand the text, next came a selective reading in order to select information, reduce data and, as advocated by Sousa (2005), to understand if the content has crucial interest to the research purpose.

Finally, different categories were defined by significant elements detected in interviewees' speeches. The method was applied through a summary table, to ease content apprehension of the information gathered in these interviews. Table 4 presents each category and subcategory. Table 5 presents those that emerged from the interview survey. All categories provided results to discuss, allowing conclusions formulation.

CHAPTER VI

6. DATA ANALYSIS & RESULTS

Facing the challenge of transforming something as basic as toilet paper in an attractive product *Renova* "reinvented" the concept and became a recognized global organization.

6.1 INTERVIEW ANALYSIS

As mentioned above, with a predefined criteria and the creation of a categorical system it is possible, through differentiation and regrouping, to classify constituent elements of a set. Bardin (2004) states also that, through condensation, categorization of basic elements provides a simplified representation of collected raw data.

Thus the adopted categorical system is exposed:

Category A – Trade Marketing

This category aims to analyze the company's Trade Marketing area development.

A1: Concept

The purpose of this subcategory is to apprehend Trade Marketing functionality within the organization, as well as its structure and operations.

A2: Distribution Channel

This subcategory intends to understand the role and applicability of Trade Marketing as a link between the organization, its clients (distributors & retail) and the final consumer.

A3: Strategy

The success of a sales plan depends on many factors. This subcategory allows understanding how *Renova* combines and enables its long-term Trade Marketing strategy, bearing in mind an agile and volatile market versus consumer's expectations.

Category B – Brand Management

This category aims to understand how a leveraged world-class brand is built and managed.

B1: Branding

This subcategory induces the interviewee to determine *Renova* brand image.



B2: A Love Brand

For a new well-being.

B3: Digital Era

Company's *digital marketing*.

B4: Sustainability

As long as an important strategic advantage for the company, investment in upstream industrial integration is also a proof of *Renova's* ecological and economic sustainability concerns.

Category C – The Consumer

This category seeks to understand the importance of keeping a strong level of personal relationship with the consumer.

C1: Relationship

Outlining the importance.

C2: Loyalty

This subcategory aims to perceive company's actions in order to develop the level of consumer engagement and commitment with the brand.

C3: Satisfaction

To understand the major features of *Renova satisfaction* is the subject of this subcategory.

C4: Dependence Risk

This subcategory refers to dependence on suppliers as a constraint in achieving business goals.

Category D – The Point of Sale

D1: Positioning

This subcategory aims to understand how the point of sale positioning strategy is designed.

D2: Competition

It aims to understand the level of influence that competitors can have in a store environment and how it influences *Renova's* product visibility.

D3: Attractiveness & Stimuli

This subcategory intends to analyze how the brand is able to trigger emotions and feelings during the purchase. It also aims to display how the attractiveness point of sale can be a deciding factor in purchase decisions.

D4: Materials

This subcategory is expected to identify the most valued material at point of sale.

Table 4 – Interview Data Categorization

Category	Subcategory	Indicators
A Trade Marketing	A1 Concept	Right after Portugal joined the European Community <i>Renova</i> adapted Trade Marketing. Before, competition and the number of competitors weren't significant. Currently, Trade Marketing has significantly increased its strategic importance.
	A2 Distribution Channel	A complete partnership process between the industry and retailers allows the maximization of sales results.
	A3 Strategy	<i>Hard work, a bit of daring and luck.</i>
B Brand Management	B1 Branding	Will go down in history as the brand that managed to turn out sexy a product traditionally as embarrassing as toilet paper used to be.
	B2 <i>A Love Brand</i>	The primary function of toilet paper eventually became something secondary.
	B3 Digital Era	<i>What we do know is that we cannot renounce it</i>
	B4 Sustainability	<i>Nature is not mute; It is the man who is deaf. McKenna, T. (1990).</i>
C The Consumer	C1 Relationship	<i>Essentially being close to people.</i>
	C2 Loyalty	Consumer tissue products are not solid neither permanent
	C3 Satisfaction	Happiness and not only satisfaction
	C4 Dependence Risk	It is essential to ensure a thorough understanding from the purchasing-side
D The Point of Sale	D1 Positioning	<i>Just give me one good reason to choose you over your competitors</i>
	D2 Competition	<i>Amazing as an absurd</i>
	D3 Stimulus & Attractiveness	<i>If we can't be a love brand, let's at least be a first-mover brand.</i>
	D4 Materials	<i>It's a dull space and a bit confusing.</i>



Hereupon, interviewee's words are analyzed according to the categories scheme above defined.

Category A – Trade Marketing

Subcategory A1: Concept

Though not operating as an independent department this function, with increasing importance and autonomy, is presently assuming a strategic role within the organization.

Renova's marketing department is organized in a three-branch model: Business Research Group; Brand Management Group and Design Group.

As a member of the second group, Trade Marketing tends to stop being a purely operational function and can be considered as a vehicle to other areas: it is an interface between Marketing and Commercial Services, Production, R&D and Logistics departments.

Renova's Trade Marketing professionals implement the concept at the point of sale, define and apply the models of collection and processing information on market and competitors as a tool to detect problems and opportunities in store environment.

Based on defined commercial target goals they also perform marketing actions at the points of sale. When properly managed those operations bring abrupt and positive results to the organization.

Subcategory A2: Distribution Channel

To create and develop relations able to provide solutions that add value to the distributor is the general purpose. It is a channel strengthened by the growing importance of building healthy relationships between the industry and the retailers. The main objective is to turn the purchase process into a pleasurable experience. Adopting a win-win culture, Trade Marketing plays a key role in achieving this business goal.

Subcategory A3: Strategy

Currently facing unpredictable environment, brands try to replace the traditional way of planning focused on quantification in a forward-looking vision. That's why qualitative parameters need to be considered using a very conscious methodology based on interests and power relations between all different actors. It is this flexibility that allows adequate responses to consumers and distributors expectations. Nowadays only flexible brands will be able to stay in the *game*.



Category B - Brand Management

Subcategory B1: Branding

Brands are different from products. Brand is a promise that the product will perform as per customer's expectations.

Asserting them on own technological research, venturing into original and innovative products sophisticated advertising campaigns and advancing in the environmental commitment, *Renova* is a brand that honors Portuguese industry.

Black Toilet Paper was worldly launched in 2005. Before that no one would imagine toilet paper discussed in the international press. Since then bathrooms of famous hotels and even toilets of prestigious restaurants could fall in word of mouth around the globe.

The importance that has been attributed to brand management, contemplating short-term advantages, delivers a strategic dimension that makes it a valuable asset to explore.

Supported on the very Portuguese expression *what is national is good*, *Renova* stands as leader in the national market.

Beyond borders scenario is different: in its products the company omits the *made in* labels. In international markets "Portugal brand" sometimes may represent a decrease in value perception or simply does not add value. Even if the product is objectively better than competitor's offer.

Subcategory B2: A Love Brand

More than toilet paper, it aspires to be a well being, conveying brand sophistication and at the same time, to be *promiscuous*.

Renova wants to fill a little bit of each consumer's heart. It's about passion and complicity. The company admits that its ultimate goal is to convert *Renova* into something else: a love brand, in a way that toilet paper becomes more than just tissue.

Again and again, forever and ever, say: I love you more!

Subcategory B3: Digital Era

In a world where the digital technology increasingly dominates consumer's behavior, *Renova's* predictions on what the Internet would become, and progressively turned out to be real, couldn't be left out.

For the company the commercialization of toilet paper, a business with direct impact on



society, is not a disadvantage in cyberspace.

It is something that constantly torments distributors; Internet asserts itself better than them.

Operating a World Wide Web shop, *Renova* presently sells conventional toilet paper directly to the final consumer: it is a product that people is predisposed to buy online. The added risk and investment are not very significant.

But a step-by-step growth web does not leave room for mistakes. In terms of visible market place, as in communication, it is a huge importance for a brand to have a digital lifestyle.

Subcategory B4: Sustainability

Lorenz, K. (2013) in *Renova Environmental Statement 2013*:

“Renova eco-policy, public in June 1993, embodies the desire to participate in the protection of global environment. With its best efforts, and in all activities, Renova compromised itself to: protect the ecological system; use natural resources and energy carefully; to promote new technological developments and applications that doesn't have negative impact on environment; to develop protection environment awareness in each Renova member; to strengthen interactions between the company, citizens and society.

Significant operational control of environmental impacts is ensured by implementation of internal procedures, training activities, consumption and emissions monitoring, establishment and measurable goals supported by improvement programs”. (See Appendix IV)

Category C – The Consumer

Subcategory C1: Relationship

To be a mind reference and assure customer's loyalty and top visibility of his product categories, *Renova* increasingly invests in brand communication. Under the “motto” *I feel good with Renova* the company strengths its empathic relations with clients, wishing to touch their hearts. It develops an ongoing process of partnership in which the consumer identifies himself with the company values. Long been proved that it is more expensive to look for a new customer than keep a current one, *Renova's* main focus is on the customer, with whom it wants to share benefits as long as possible.

We intend to develop family ties with the final consumer through the most special dates: Christmas, Valentine's Day and so on; essentially, we want to be close to people. (See Appendix V)

Subcategory C2: Loyalty



The growth and development of a company is due largely to the support it receives from loyal customers. Today, when competition is fierce and markets are changing faster and faster, differentiation is low and creative promotions are rare.

Aware that consumer's options are very volatile and unstable, *Renova* fights loyalty breakdown mainly at the point of sale since being loyal to conventional toilet paper is quite relative. Point of sale is the key point where and when dynamic actions are taken. It is where, besides price, quality contrast among competitors can be highlighted. That's why *Renova* assumes to be committed to create several solutions to their *beloved ones*.

Subcategory C3: Satisfaction

A brand is an accumulation of public emotional and functional associations. It shapes customer's expectations about the product and gives particular information on the organization, its goods or services, differentiating them from others in marketplace.

Beyond *Satisfaction*, *Renova* pursues *Happiness*. Consumers remain committed and loyal to a brand as long as they believe in it. Have an implicit understanding that the brand will continue meeting their expectations and perform consistently in the desired manner. Away from the point of sale, a valuable territory has to be created, where potential and current customers rely. But, being realistic, the greatest happiness that a person can have when invest and acquire a product of any type is that it is highly qualitative and functional. More than encouraging a future purchase, *Renova* wants to create such a greater satisfaction that customer *wants to be a part of its family*.

Subcategory C4: Dependence Risk

It is the type of risk that could severely affect the supply chain. Over-dependency is a concern; each supplier has the potential to exploit its position and deterring other bidders.

Not fully, but mostly, we depend on the distributor to reach final consumers.

Category D – Point of Sale

Subcategory D1: Positioning

The relationship with suppliers extremely influences positioning at point of sale. Curiously distributor buyers have this decision power, not the CEO nor CFO, but an ordinary commercial. There is a relationship to be maintained. Marketing provides business tools to seduce these buyers and to obtain maximum shelf space to commercialize our products.

It is a relationship that has to be promoted as an important strategy. Ensures that is given the



best opportunity to products be distinguished in shelves. Using merchandising in the right way and appropriate POS placements raises awareness. Becomes the process of creating perception in consumers' minds. A good management will act as a differentiating factor between selling products or killing them. (See Appendix VI)

If they remain invisible, no one will buy them.

Subcategory D2: Competition

The strategy is to create contrast, mobilizing the point of sale, evidencing price and through promotional mechanics create solutions and product offerings. No participant is able to influence market price by itself today. With the huge diversity of products marketed at the POS becomes really difficult to identify competitors.

In this type of product easily consumers can opt for generic brands - distributors brands.

Distributors are also customers, and what is comforting is that they can't survive only from generic brands.

Generic brands, implied from the beginning as supermarket brands and subliminally, with lower quality perceived, have become (perhaps) under the crisis, the *queen* of basic goods.

Generic brands have an advantage on shelves. However, historical and well-known brands with relevant proposals have evolved with the consumer. Manufacturer brands create dreams; Distributor brands turn these dreams into medium ones.

Toilet paper took on a whole new role.

Abandoned taboos to be adopted as a Christmas gift. Amazing as an absurd.

Subcategory D3: Stimulus & Attractiveness

It is extremely difficult to add value to conventional toilet paper at point of sale, i.e., when the customer has never experienced Renova.

There has to be certain coherence in using POS materials; in how to communicate; how to decide gondola positions and how to be presented in promotional flyers.

Renova owns a brand culture and reputation: *The Tissue Revolution*. Rather than being memorized by customers, *Renova* wants to create empathy and complicity in peoples' mind. As a commodity, it is necessary to incorporate physical characteristics that differentiate it from competition. This doesn't have to do with product functionalities, performance and smoothness, but is related to aesthetic and product design. Pioneer in toilet paper fragranced



provides intangible benefits to the consumer, as product dermatological testing.

Researching in a worldwide level, *Renova* values what is most valued by consumers and applies it at point of sale, encouraging purchasing:

We can't allow customers to feel indifference to the product, there must be an ability to take risks, make mistakes and get it right. At the same time we stand as traditional and innovative. If it cannot be a love brand, at least a fast-mover brand - Allowing the company to acquire higher brand recognition and customer loyalty.

The doubt remains in establishing which is the ideal balance between investment in media and on sale. Impulse buying occurs when the consumer is hit by a stimulus that leads it to purchase. (See Appendix VII)

Subcategory D4: Materials

Bored and confused.

This is how *Renova* thinks about how the customer would feel walking around a toilet paper supermarket linear. It is difficult to identify the best offer and *Renova* works hard to transform the POS as clear as possible.

Challenges are identified: what kind of solutions should be exposed in a supermarket - Regarding 'infinite' existing types of toilet paper, more compact products, colorful products, lotion products; they all have the same promise – the value purpose is not sufficiently clear for the customer to identify.

Despite online strength, advertising brochures continue to be an effective marketing tool in physical stores; it incorporates images and stimulates sales. So good as a good shelf positioning is to be published in promotional brochures, mainly due to today's consumer is more sensitive to promotion, choosing immediate savings where possible.

Due to their appealing and informative nature, POS materials are capable to stimulate purchases in a few minutes.

... Wobblers, shelf-talkers, stoppers, price tags, packaging, promotional stands, roll-stands, banners, hard posters...

Renova team has it all. (See Appendix VIII)

6.2 INTERVIEW SURVEY ANALYSIS

Next Table 5 presents responses given by interviewees in the survey, with greater incidence in Trade Marketing area as part of the organization. Grouped into three different domains, it analyzed in detail each domain as well as participant's comments. Although interviews were conducted individually, total similarity of results demonstrates cohesion within the company.

Table 5 – *Interview Survey Data Categorization*

Domain	Activity	Yes	No
Motivation to adopt Trade Marketing	Integrates Marketing area	x	
	Integrates Sales area	x	
	Manages relations between the company and distributors	x	
	Reaches the consumer through the integration of marketing activities at point of sale	x	
	Combats the rising power of distributors		x
	Support Key Account Managers in developing plans and specific actions for each channel	x	
	Supports Key Account Managers in developing plans and specific actions for each customer	x	
Trade Marketing Area	Operates as an independent department		x
	Owens budget		x
	Point of Sale Team		x
Trade Marketing Operations	Investigates the shopper/consumer behavior	x	
	Investigates the most effective way to influence purchasing	x	
	Identifies opportunities in channels	x	
	Develops strategies for channels and distributors		x
	Sets performance channels		x
	Perfects trading conditions	x	
	Analyzes economic viable activities		x
	Determines distribution costs		x
	Manages promotions budget		x
	Responsible for deadlines		x
	Diagnoses and evaluates the need of promotional activities		x
	Launches products	x	
	Measures the impact of sales promotions		x
	Measures the impact on product life cycle promotions		x
	Optimizes merchandising at the point of sale	x	
It is responsible for developing and manage point of sale space	x		



First Domain

Motivation to adopt Trade Marketing

Trade marketing area exists in the company for more than 30 years, supporting communication at Point of Sale. Through merchandising activities it connects marketing and commercial departments. It has responsibilities among key actors involved and together develops operations directed to each channel. The biggest motivation for adopting Trade Marketing was the increased competition, growing demand of retailers and the adequacy of marketing strategies to customers

Second Domain

Trade Marketing Area

All activities are related to the development of strategies, knowledge about each channel and buyer behavior. *Trade Marketing* reports every single move to *Brand Management Group* branch and consequently to Marketing. There is a person responsible for trade marketing, which works along with the sales team as an advisor.

Third Domain

Trade Marketing Operations

Trade marketing in the organization is responsible for communication and point of sale actions - merchandising. It also has responsibility in constantly highlight *Renova* at the field. Operates it through constant actions, stimulating consumption and promoting relations with the distribution channels. Acquires knowledge about the shopper and reports it to *Marketing* to add volume and margin to business.

In addition to these duties, this area has the obligation to communicate adequately point of sale strategies, to provide a greater assurance on the alignment between planned and actual implemented. It is responsible for managing, ensuring shelf space and gondola share. Benefits from materials to optimize the point of sale.

RESEARCH FINDINGS & DISCUSSION

As described in the literature review of this research, 85% of purchase decisions are taken at the point of sale, suggesting that consumer decisions are highly volatile and there is a constant possibility of switching brands, due to how incentives are there induced, as Blessa (2010) refers.

This study raised three discussion points: (i) Trade Marketing as an essential area in a company engaged in the consumer goods industry; (ii) The ability of Point of Sale to influence loyalty behaviors; (iii) How Point of Sale Operations can influence the purchasing process.

The main objectives of the research are as follows: (i) Importance and performance of Trade Marketing; (ii) Loyalty and Satisfaction concepts and, finally, (iii) Importance of branding at the point of sale;

In the case study a qualitative analysis through interviews and interview survey were accomplished to verify the matching or rejection of the points discussed along with the research objectives.

First discussion point – Trade Marketing as an essential area in a company engaged in the consumer goods industry – is important to underline that the present case study is on an organization that records a current turnover of around 140 million euros, a national market leader with a market share of 25% to 30% (Portugal Global, 2015).

Though it is not an independent department in the company, Trade Marketing integrates *Renova's* Marketing group in most of its activities and Commercial Sales area when considering merchandising.

Trade Marketing developed inside the company as a result of Portugal's entry in the European Economic Community. New competitors in internal market forced changes in national retail culture (D'Andrea; Consoli; Guissoni, 2011; Alvarez, 2008; Arbache et al, 2004).

Based on information intelligence, to communicate, to plane and to analyze profitable operations were defined as *Renova's* main objectives. With several strategic roles within the category, according to Maluf (2010), Trade Marketing emphasizes relationships between supplier and points of sale to provide a better placement in retail. It also ensures brand performance among consumers (Blessa, 2010).

Endorsing Corstjens and Corstjens (1995), who claim that Trade Marketing faces three main challenges – to maximize the value offered to retailers, to ensure that all activities are built

contemplating a reliable profit to the industry and to avoid risk dependence –, *Renova* tightened relationships with retailers, built partnerships fundamental to the development of its activities, and attempted to innovatively fulfill shoppers desires.

Blessa (2010) pointed out that Trade Marketing *raison d'être* is to improve product positioning in retail and ensure brand performance amongst consumers.

That's why Trade Marketing affirms itself as a function that cooperates seamlessly with marketing, sales and retail in pursuance of product attractiveness at the point of sale.

Linked to the second point of discussion – The ability of Point of Sale to influence loyalty behaviors – and the obtained results, this study becomes quite relevant given present Portuguese economic situation. Knowing consumers attitudes towards brands and preferences is indispensable, either to distributors or to manufacturers, to realize how decisions are taken and thus, develop strategies to strengthen shoppers loyalty.

Consumers who assume to be loyal to a specific brand are less willing to choose a different one from those that are familiar to them. On the contrary, those who seek variety, according to Kotler and Armstrong (2001), aim to always purchase something different and are very susceptible to promotions, seen as an advantage to generic brands.

The price is usually associated with product quality. According to Aaker (1998) price tends to be a quality cue whenever product information (intrinsic or extrinsic) is not available to the consumer. Some tend to associate low prices to lower quality and higher prices to improved quality. Thus higher prices lead to greater perceived quality and consequently, higher purchase willingness by consumers.

Success of distributor brands in the market is quite noticeable and strongly justified by a wide product range available to consumers, a practice of lower prices and good quality (Cardoso, A.; Alves, P. 2008), i.e., an high *price/perceived quality* relation.

In last discussion point merges two features: the importance of branding at the point of sale and how point of sale operations can influence the purchasing process.

Keller and Machado (2006) stated that although there are different definitions about brand equity, they all underline the importance of it.

The point of purchase is a place where everything that a brand has done either results in a sale or does not. While some consumers still state that manufactures brands are better than



distributors brands, most wouldn't waste the time to seek out their preferred one in a different store from that where they are used to shop.

According to an article published by *The Economist* in 2005, consumers spend no more than 6 seconds trying to find a preferred brand before they give up and purchase, instead, a substitute.

From the researching process it was found that *Renova* can maximize product brand's probability of success at point of purchase.

It does so by delivering enough visibility to their unique products characteristics, including distinctive packaging size, shape and colors; developing emotional connections upstream and downstream the point of purchase, focusing on loyalty; creating a prominently visible brand identity; developing point of sale signage that simply and powerfully communicates most of the compelling points of difference; ensuring that the product will receive maximum attention from retailers, and together with them, developing innovative in-store promotions that highlight the brand.

Renova's final purpose is to of evolve and control the upper point of purchase experience.

CONCLUSION

To achieve the proposed intention of this essay, a literature review was performed covering the main concepts involved: Marketing, Brand Management, Brand Equity, Loyalty, Satisfaction, Trade Marketing, Consumer Behavior, Point of Sale, Pricing and Merchandising. It allowed further clarification on the evolution of this the research, from Marketing to Trade Marketing and all the way from the Point of Sale until the Consumer's point of view.

As a case study, *Renova* proved to be a proper example of a company fully engaged in the consumer goods industry. Market leader in Portugal, with more than 70 years of history behind, nowadays *Renova* distributes its products in more 60 countries, diffusing itself around the world. With innovative products, not always easy to communicate and sell, the company reinforces its great success and visibility to boost exports and business volumes. Positive financial results reflect its growing brand awareness.

Established on the specific objectives of this study and aiming to satisfy the main research question – *Do the adopted strategies at Point of Sale positively influence brand visibility, making it a brand of choice?* – The following discussion points were raised: (i) Trade Marketing as an essential area in a company engaged in the consumer goods industry; (ii) The ability of Point of Sale to influence loyalty behaviors; (iii) How Point of Sale Operations can influence the purchasing process. An interview and three (similar) interview surveys were required to assure a careful examination and a qualitative research of the case study presented.

To be more precise on the discussion points of the study, during its interview analysis several categories and sub-categories were defined:

Three in category A, Trade Marketing: Concept, Distribution Channel and Strategy. Four in category B, Brand Management: Branding, Love Brand, Digital Age and Sustainability. Four more in category C, The Consumer: Relationship, Loyalty, Satisfaction and Dependence Risk. And, finally, another four in category D, Point of Sale: Positioning, Competition, Stimulus & Attractiveness and Materials.

In the interview survey three areas for review and deliberation were addressed: (i) Motivation to adopt Trade Marketing; (ii) Trade Marketing Area; (iii) Trade Marketing Operations.

The research findings of this study and presented case study concluded that Trade Marketing area is essential in *Renova* global strategy. Although not operating as an independent department in the company, this division developed as a result of changes in retail culture.



Renova admits that is extremely difficult to add value to conventional toilet paper. It is not easy, at the point of sale, to assure loyalty behaviors with this type of product. As a simple commodity with innumerable competitors sometimes it becomes impossible to compare prices and quality on the spot.

But *Renova's* tight relationships established with its retailers built partnerships fundamental to boost sales and innovatively meet consumers and their desires. The concern with the highlighting of the brand at point of sale also stimulated consumption. Acquired knowledge about the shopper, reported to marketing, added margin and volume to business.

In the field, strategies were taken to maximize product visibility, ensure that the product receives full attention from retailers and in-store promotions were designed with appropriate *POS* materials.

Renova believes that is possible to maintain a *status of brand of choice* if all of that is mixed with a pleasant purchase experience,

Despite the fact that this study was on a prestigious company that produced an internationally recognized *Next Generation Brand* (Fisk, p 2014), the nature of this research does not allow results to be generalized. It is appropriate, exploring different perspectives of other involved stakeholders, to suggest a further investigation on the theme.



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APPENDICES

APPENDIX I



The New York Times
nytimes.com

mistress
america
now playing

May 18, 2006

DESIGN NOTEBOOK

This Season's Must-Have: The Little Black Roll

By [PENELOPE GREEN](#)

LAST Monday night, both the men's and women's bathrooms at the Double Seven, an ink-and-gold nightclub on West 14th Street, carried new accessories: rolls of black toilet paper, though you could hardly see them through the gloom. (The Double Seven's bathrooms are tiled in black, have black toilets and sinks and are lighted by candles.)

Laurie Black (her real name), a 34-year-old customer relations manager at an information technology consulting firm who was there having a drink with her boss, obligingly tugged out a length of the stuff and squinted. "It certainly doesn't jump out at you," she said finally. "I imagine once you'd pulled it out your train of thought would be interrupted. You'd stop worrying about whether or not you'd paid for your last drink or whether you were going to go home with this guy. You'd think, wow, black toilet paper. Am I really going to use this?"

Good question. If black is the new black, again, should its influence extend to toilet paper? Can toilet paper make it as an object of design, a touchstone of chic? More important, should it?

"The question for us was not why, but why not," said Paulo Miguel Pereira da Silva, the president of a Portuguese paper company called Renova, which has just begun testing its new product, Renova Black, otherwise known as black toilet paper, in this country. Mr. da Silva, who speaks Portuguese and French, communicated with this reporter by e-mail, his answers and my questions translated by an employee.

Mr. da Silva wrote that he had been thinking about the idea of spectacle and how it relates to consumer products while at a trade show in Las Vegas. Black was an intuitive choice for toilet paper, he suggested, because it signals "avant-garde creative work."

"In a design sense," he wrote, black means "irreverence, maybe touching a bit on the core nature of art, which is to break rules and set new ones."



"Culturally, deep down, Renova Black invites people to break down whatever might be limiting as common sense ideas," he wrote.

Mr. da Silva ventured that his new product was "neither solely a product, an object or a communication tool," but some heady combination of all three. He also admitted, more prosaically, that when he stocks his bathroom with Renova Black at parties, guests tend to pinch the rolls.

In any case, hoping to capitalize on the concentration of design folk in town for the International Contemporary Furniture Fair next week, Mr. da Silva's company has hired Kelley Blevins, a soft-spoken, Tennessee-born public relations executive at OnTrend International, to find Renova Black just the right context. (He's already placed it in urgent hot spots like the Double Seven, Frederick's Bar & Lounge, Frederick's Restaurant and the basement bar at La Esquina.)

"I wanted as many tastemakers and influencers as possible to have a personal encounter," said Mr. Blevins, who claims to be the man responsible for making the Chupa Chups lollipop a fashion accessory a few years ago, and so has had some experience in giving a stylish sheen to unlikely items.

Black toilet paper is enjoying its pre-buzz stage, said Mr. Blevins, who as of Tuesday had promises from Conran's, Catherine Memmi (a furniture and design store in SoHo featuring much dark wenge wood and white leather), Troy, Vitra and a gaggle of meatpacking district boutiques like Stella McCartney, Carlos Miele, Rubin Chapelle and others that black toilet paper would be a staple at their furniture fair parties.

"Basically, everyone with a bathroom said yes," Mr. Blevins said.

A few weeks ago, when André Balazs threw a party for his girlfriend, Uma Thurman, at Frederick's Bar & Lounge on West 58th Street, the buzz was so soft no one heard it. Reached in London last week, Mr. Balazs, after a muffled conversation with the birthday girl, said the toilet paper was "there, and, uh, it was very black."

"O.K.," he admitted, "nobody noticed."

Mr. Balazs was more voluble, however, when asked if, as a hotelier, he had ever given a toilet paper brief to anyone on his design team. "I certainly did," he said. "We worked on a special sticker for the toilet paper at the Standard Downtown," he added, referring to one of his Los Angeles hotels.



"The concept was that the whole place was part of a mythical evil conglomerate from the 1970's, something that John DeLorean might have run, and so the artist Ryan McGinness, who is fascinated by corporate logos, designed a language based on the human pictograms you see in airports."

Mr. McGinness, Mr. Balazs said, designed a toilet paper pictogram of a man in the middle of doing that for which toilet paper is made.

He did not.

"He did, too," Mr. Balazs said. "Go and look. There is really no end to the amount of attention that one should lavish on the bathroom."

Not even the versatile Philippe Starck, who has designed everything from a toilet cleaning brush to an earwax scooper, has ventured so far as toilet paper, however. Though in 1960, the fashion designer Pierre Cardin, in a licensing frenzy, did put his initials on the stuff, said Marian McEvoy, a contributing editor at Domino. "Which is kind of funny, having the letters P.C. on toilet paper," she said. "I'm just wondering why someone hasn't done black before, though I could see it, too, in an electric, on-fire blue, or maybe stripes."

Black toilet paper is an obvious fit for the dream-world of club and hotel bathrooms, but a weirder fit at home, unless you happen to have one of those stainless steel toilets that were all the rage a few years ago.

David Mandl, an architect, has a guest bathroom in his Manhattan apartment that's all steel and slate, and features the brushed stainless lavatory manufactured by a company called Neo-Metro. "I wanted to give the bathroom an edge," he said the other day. "With black toilet paper I think it would look awesome."

(You can't buy Renova Black in stores here yet – remember, this is its pre-buzz period. But you can buy it online from the company, at renovaonline.net, for about 2 euros, or about \$2.50. There is a horrifying deep

red version on the site too, but it's only for sale to Europeans.)

Donald Albrecht, the curator of the Dorothy Draper show at the Museum of the City of New York, said he thought Mrs. Draper would have taken to the concept with gusto. "We've got a recording of an Edward Murrow interview where he asks her what she'd most like to design, and she says, 'A butcher shop, which would be all white except for the noses of the pigs, which would be bright pink.' If anybody could be serious about color and toilet paper, it would have been her."



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APPENDIX II

RENOVA S.A

Entrevista ao Dr. Luís Saramago (Head Marketing) Renova S.A

Nacionalidade:

Formação académica:

Cargo:

Há quanto tempo:

Quando tempo está na Renova:

Esta entrevista é somente direcionada ao vosso produto de consumo essencial – o papel higiénico.

Perguntas gerais – teoria

1. Há quanto tempo existe e é aplicado o conceito de Trade Marketing?
2. Quais os principais conflitos e sinergias de processos e metodológicos entre o departamento de TM e os demais?
3. Como é que a função de Trade Marketing, na Renova e para o mercado nacional, tem contribuído para uma estratégia vencedora? Que dificuldades tem encontrado na aplicação do conceito e como as tem vencido?
4. Na sua opinião, quais são as perspectivas de desenvolvimento da função/cargo do Trade Marketing/Marketeer?

Perguntas aplicadas - Case Study

1. Qual é o valor de mercado atual da marca?
2. A Renova tem décadas de história no mercado nacional e uma recente entrada nos mercados internacionais. A origem portuguesa da marca não prejudicou a sua internacionalização? Se sim, como ultrapassou?
3. Quais as características da marca renova mais valorizadas pelo consumidor? E como as potenciam no ponto de venda?
4. A Psicologia e a Economia ensinam que a satisfação do consumidor ultrapassa a utilidade imediata após a compra. Assim, torna-se evidente o conceito de lealdade. De que forma, a Renova, incorpora este mesmo conceito, diretamente no ponto de venda, na expectativa de motivar uma próxima compra?
5. Por outro lado, possíveis dificuldades eventuais e inesperadas para a realização do ato de compra podem por em causa a lealdade do consumidor. Que “armas” utiliza a Renova, no ponto de venda, para as combater?
6. O retalhista é um intermediário na relação da marca com o consumidor final. Como e que a renova tira partido dos retalhistas para melhorar a esta relação?



7. Como determinam o melhor posicionamento no ponto de venda e que estratégias levam a cabo com os distribuidores para determinar este mesmo posicionamento?
8. Como é que a Renova está a adaptar a sua estratégia no ponto de venda face a um mundo em que o comportamento do consumidor é crescentemente determinado pela Era Digital?
9. O mercado do PH, hoje uma necessidade básica dos consumidores, em termos de concorrência muito estável ou revela grande dinamismo com o aparecimento de soluções inovadoras regulares?
10. Como é que a Renova, como marca de valor, sente a concorrência do produto de marca branca? E como é que o combate no ponto de venda?
11. Quais as preocupações da marca relativamente aos possíveis impactos ambientais causados pela produção de papel higiénico? E como e que no ponto de venda conseguem dar visibilidade a esta preocupação?
12. Como todas, a renova depende dos consumidores. E os consumidores sentem-se dependentes da Renova? Como?
13. Quais os determinantes na "experiencia de compra Renova"? Portanto, quais os principais estímulos?
14. Como e que a renova transmite emoção ao produto – PH – no ponto de venda
15. A fim de garantir a fidelização do consumidor que importância relativa dão aos seguintes factores: motivação pessoal, laços sociais, pressão dos consumidores?
16. Como caracteriza a relação dos portugueses com a marca?



APPENDIX III

Categoria	Atividade	Sim	Não
Motivação para a adoção do Trade Marketing	Integra as área de Marketing		
	Integra a área de Vendas		
	Gere e estreita relações entre a empresa e distribuidores		
	Alcança o consumidor por meio da integração das atividades de marketing com as necessidades do ponto de venda		
	Combate o aumento de poder dos distribuidores		
	Apoia os <i>Key Account Managers</i> no desenvolvimento de planos e ações específicas para cada canal		
	Apoia os <i>Key Account Managers</i> no desenvolvimento de planos e ações específicas para cada cliente		
Área de Trade Marketing	Atua como departamento independente		
	Tem orçamento próprio		
	Treina equipa de vendas		
Operações do Trade Marketing	Investiga o comportamento do <i>Shopper</i>		
	Investiga a forma mais eficaz para o influenciar no ato de compra		
	Identifica oportunidades nos canais		
	Elabora estratégia por canais e distribuidores		
	Define canais de atuação		
	Aperfeiçoa as condições comerciais		
	Analisa a viabilidade económica das atividades		
	Determina custos de distribuição		
	Gere orçamento de promoções		
	Controlar prazo de entrega de produtos		
	Diagnostica e avalia a necessidade de ações promocionais		
	Apoia o lançamento de produtos		
	Mede o impacto das promoções sobre as vendas.		
	Mede o impacto das promoções no ciclo de vida do produto.		
	Optimiza o merchandising no ponto de venda		
É responsável por desenvolver a gestão do espaço no ponto de venda			

APPENDIX IV



BUREAU VERITAS
Certification

**DECLARAÇÃO DO VERIFICADOR AMBIENTAL
SOBRE AS ACTIVIDADES DE VERIFICAÇÃO E VALIDAÇÃO**
(EMAS III - ANEXO VII)

Bureau Veritas Certification, com o número de registo de verificador ambiental EMAS PT-V-0004 acreditado para o âmbito "Fabricação de papel e de cartão" (código NACE 17.12) declara ter verificado se o local de actividade, tal como indicada na declaração ambiental, da organização **RENOVA – FÁBRICA DE PAPEL DO ALMONDA S.A.**, com o número de registo PT-00013, cumpre todos os requisitos do Regulamento (CE) n.º 1221/2009 do Parlamento Europeu e do Conselho, de 25 de Novembro de 2009, que permite a participação voluntária de organizações num sistema comunitário de ecogestão e auditoria (EMAS).

Assinando a presente declaração, confirma-se que:

- a verificação e a validação foram realizadas no pleno respeito dos requisitos do Regulamento (CE) n.º 1221/2009;
- o resultado da verificação e validação confirma que não existem indícios do não cumprimento dos requisitos legais aplicáveis em matéria de ambiente;
- os dados e informações contidos na declaração ambiental/na declaração ambiental actualizada da organização/do local de actividade reflectem uma imagem fidedigna, credível e correcta de todas as actividades da organização/dos locais de actividade, no âmbito mencionado na declaração ambiental.

O presente documento não é equivalente ao registo EMAS. O registo EMAS só pode ser concedido por um organismo competente ao abrigo do Regulamento (CE) n.º 1221/2009. O presente documento não deve ser utilizado como documento autónomo de comunicação ao público.

Feito em Lisboa, em 11 de Maio de 2014



Assinatura (Direcção Geral BV CER)



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Nov 2012

APPENDIX V



APPENDIX VI





APPENDIX VII



APPENDIX VIII

