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A Study on the Consumers' Perception and Their Consumption Pattern for Processed Dairy Dairy Products in Karachi

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***A STUDY ON THE CONSUMERS' PERCEPTION AND
THEIR CONSUMPTION PATTERN FOR PROCESSED
DAIRY PRODUCTS IN KARACHI***

ALESHBA HASAN

CHAPTER 1

PROBLEM & ITS BACKGROUND

- 1.1 Introduction**
- 1.2 Statement of Problem**
- 1.3 Significance of study**
- 1.4 Scope**
- 1.5 Delimitations**
- 1.6 Definitions**

1.1 INTRODUCTION:

It has been a general observation that with the passage of time the trends, habits & styles of humans keep on changing. Man has emerged into the modern golden era with a host of new technologies & discoveries leaving behind the dark old days of manual work and hard labor. These changes have carved significant difference in the basic human needs and wants. Food being one of the major factors. Gone are the days when people wasted their time and efforts both in order to provide simple dairy products like milk, butter, and yogurt to their families.

No doubt there are such services available that provide fresh dairy products at your doorstep but today most of the people do not believe raw dairy products to be as pure and hygienic as the people believed some 50 years back. This is because of awareness and literacy that has forced mankind to think and probe on issues such as health & hygiene.

This is the point where the old trend of fresh dairy products is replaced by the *Processed*, packed and treated *dairy products*.

THE EVOLUTION:

The dairy products under research namely milk, butter, and yogurt are all made of milk. Therefore milk is the main focus point. Milk is *pasteurized* at 78 C, killing 98% germs/bacteria. The milk after pasteurization is then *standardized* as prescribed by the Pakistan Pure Food Laws at 35% fats & 8.9% SNF (Solid non-fats). This milk is *homogenized*. It is then passed through UHT (*Ultra Heat Treatment*) process before it is packed using advance *Tetra Brick Technology*.

In Pakistan, Tetra Pak started its function in 1982 as a joint venture between Tetra Pak International & Packages Pakistan Limited. The Company started its operations with the packaging and processing equipment purchased from Tetra Pak companies operating outside Pakistan, which were also providing technical & marketing support to the Pakistan liquid food industry.

Experts say that, Pasteurization & Homogenization is the only process to produce hygienic & healthy milk. “It is the only way to preserve milk; otherwise it gets fermented & loses its quality in two hours after extracted from an animal”.

In other words, the process not only enhances the shelf life of dairy products up to eight days in the refrigerator, but also reduces the fat level & kills different germs and bacteria.

Secondly, raw milk is supplied from the cattle market at Landhi & also from interior Sindh. The open milk supplied through hundreds of milk sellers in the city is not considered as hygienic by doctors & food experts. There are various reasons for it.

- If the animals have diseases they can be transmitted to human body by milk consumption without proper process of pasteurization. Such diseases include TB, Hepatitis, & other diseases often found in animals.
- Besides the contamination hazard, fat is another issue which makes open milk is 7-8% much more than the standard 3-3.5%. Doctors say that “Fatty milk not only creates digestive disorders but also increases the level of cholesterol, which increases chances of cardiovascular diseases”.

Yet the availability of raw milk in the market is a rising issue, which discourages the private sector and government from establishing milk plants for processed milk.

PRESENT STATUS:

Today, despite being ranked as the 5th largest milk producing country in the world, only 3% of our 27 million metric tons of milk produced is being processed by the dairy industry.

Only this mere 3% of the processed dairy products, being supplied to the people of Pakistan could be termed as of prescribed standards, whereas, the rest of the products are sub-standard.

1.1.1 BRANDS:

Though there are a number of processed dairy products under different names are present in the market, this study will include only those brands which are most commonly consumed. Their brief introductions are as follows:

NESTLE:

Nestle is the biggest name in food processing companies.

In Pakistan Nestle has become a household name which manufactures and markets a wide range of dairy products, baby milk and food, ready to cook items such as noodles, chicken broth, toffee and candies.

Milkpak, tetrapack milk, is the flagship product of the Nestle's Milkpak range. The company was the pioneer to launch the Milkpak in 1981. The range also includes butter which was launched in 1985 and cream, launched a year later. The same year it also introduced Milkpak pure 'desi ghee', dairy shortening, to cater to local taste.

Today Nestle products range covers a diversified group of food group items as EveryDay powder tea whitener, Nido full cream powder milk, Milo chocolate drink-mix, Nescafe coffee, Cerelac infant cereal, Lactogen infant milk formulae, Maggi 2-minute noodles and Maggi Yakhni (clear chicken broth). It also includes ready to cook custards; imported as well as locally manufactured confectionery such as Toffo

Toffee, Polo drops and KitKat chocolate bars and Pure Life bottled water which was introduced last year. In addition, Nestle is the market leader in the fruit juice market.

It has helped thousands of small households in the urban areas which are dependent on Nestle to sell the milk. Nestle has over two dozens milk collection centres in Punjab and Balochistan to depend on poor quality milk available from outside sources.

The emphasis on providing consistent quality, aggressive marketing and distribution plans in addition to the convenience to enjoy hygienically packed dairy and fruit juice products year round has helped Nestle to reinforce its leadership position throughout the years since it launched its flagship product, Milkpak UHT milk, in 1981 in Pakistan.

HALEEB:

Haleeb Foods Limited (formerly CDL Foods Limited) is a fast growing food products company. Having doubled its turnover in the last four years, the company has a turnover of more than Rs.4 billion presently. The company also operates as a franchise of **Candia Cedilac of France**. CDL has a state of the art milk processing facility situated at 62-KM Multan road, Near Bhai Pheru, and has a team of 400 exceptional individuals to support its operations. The head office of CDL is located in the evergreen city of Lahore at 135-Ferozepur Road. CDL is producing a number of food products both for consumers and industrial users.

CDL is the first food company and so far the only dairy company in Pakistan to get ISO 9002 Certification - a Quality Management System. While adhering to this Quality Management System, the company is committed to strict quality standards in all its operations - from the collection of milk to the provision of hygienically processed nutritious products to its customers. The company follows the philosophy of "delighting the customers". The company treats them as partners and keep channel of communication open with them. The company has succeeded in this by continuously improving the quality of its products and by satisfying the needs of its

customers. The company believes in creating and sustaining an environment, which encourages learning and empowerment and these in turn help strengthen the quality culture across the business. Company's Mission: · Providing nutritious and hygienically processed food product to our customers. · Enhancing our reputation for quality in all our operations. · Promoting mutual trust with customers, suppliers, employees and shareholders. · Providing a healthy and safe environment to our community.

MILLAC:

We are a progressive food company having the highest quality standards, currently engaged in manufacturing and marketing of dairy products. We believe in adding value to the lives of our consumers and to hire, train and motivate the best human resources. We shall always strive to achieve & retain competitive advantages through consistent product development. We are geared to achieve Riba free operations within the next five years.

In 1967 Horlicks, of England established **Pakistan Milkfood Manufacturers Ltd. (PMML)** in a small town called Jhang in the country midlands with the family owning a small part of the company. Then in 1970 Pakistan Milkfood Manufacturers Ltd. (PMML) was bought out by the family, and was authorized to use the Horlicks brand name. The Company launched its own brand “Malticks”, after using the Horlicks brand name for two years.

In 1973, the Company ventured into the imports of high quality fat filled milk powder from Ireland under the brand name **Millac**, and formed a company by the name of **Millac Pakistan (Pvt.) Ltd.** Ever since, Millac remains a household name when it comes to milk. PMML invested in a sweetened condensed milk plant, and launched the brand **Comelle**. Ever since its inception, Comelle has remained the market leader in its category.

In 2000 the brand **Nutramil** was launched. **Nutramil** is a high quality milk powder at an affordable price. **Skimillac**, an ace brand in the skimmed milk category was launched in 2003. The Company re-launched **Comelle**, in 2004 with the new packaging and plastic lid. **Comelle** sachet was also added to the existing product line. **Perkup**, a tea-whitener was also launched to broaden the existing product range.

Finally in 2005, the Company launched **Comelle Khalis Desi Ghee**, with "Easy Open End" packaging and plastic lid.

1.2 **STATEMENT OF THE PROBLEM:**

Despite of all the adverse effects of raw milk & its products, they continue to surpass the consumption amount of the processed dairy products.

There are a number of reasons for this situation:

- i. Raw milk and other dairy products are cheaper than the processed dairy products.
- ii. Illiterate and low-class people do not place importance on facts such as health and hygiene when buying dairy products, thereby ignoring processed products & preferring the cheap, easily available unprocessed dairy products.
- iii. Due to the Pakistani culture, most of the families continue to follow the old tradition rather than opting for new trends and technologies.
- iv. Future scope and profitability for processed dairy products in the Karachi market.
- v. Impact of current advertising on consumer's perception and consumption of processed dairy products.
- vi. Reasons why consumers prefer/not prefer processed dairy products.

1.3 SIGNIFICANCE OF STUDY:

This research will provide a platform for the future use for students who are interested to pursue this research.

Secondly, this study will give the consumers a clear idea about the difference in raw milk products & processed dairy products.

Thirdly, and most importantly this study will be beneficial for the processed dairy products manufacturers in the following ways:

- It will find out whether people prefer quality or price while buying dairy products.
- It will provoke the consumers sub-conscious desires, needs & wants and this analysis will provide guidelines to the manufacturers so that they can improve their products, advertising & marketing strategies.
- The manufacturers will get an idea about their own image as well as the competitor's image in the mind of consumers.

1.4 SCOPE:

The scope of the study is based on the current scenario, which is prevailing in the country.

The data for this project will be collected over a three to four month period of time only in Karachi.

This study is only limited for the Karachi city because every city's customer preferences and consumption pattern may be different according to their culture and life styles.

1.5 DELIMITATIONS:

The following delimitations are identified in this study:

- The prices quoted in the research may vary/change with the passage of time.
- Consumption of the processed dairy products vary (i.e increases or decreases) on special occasions for example, Ramadan, Eid etc.
- Due to the random sampling of respondents, each response maybe totally different from the other.
- New brands of processed dairy products may be launched during or after the research which are not mentioned in the study.
- The study is conducted with a limited amount of expenses (cost).
- The data collection and analysis time period is restricted to 2 to 3 months.
- The study is limited to Karachi only.

1.6 DEFINATIONS:

- **Pasteurization** **Pasteurization is the process of boiling milk and then immediately cooling it to a lower a very low temperature.**

- **Standardization** **Standardization is the process in which the excess fats and SNF's are removed from the milk in order to achieve the standard of 3.5% of Fat and 8.9% of SNF as prescribed by the Pakistan Pure Food Laws.**

- **Homogenized** **A process in which all the cream in the milk is mixed into the milk. In this process the milk is passed through 200 bars of pressure, which in turn breaks each cell to 0.5 microns.**

- **Sterilization** **It is the process of heating every particle of milk for at least 212 degrees Fahrenheit for such a period so as to ensure that all micro organisms are killed.**

- **UHT** **It stands for Ultra Heat Treatment. In this process the milk is passed through 140 degrees Centigrade in 3 seconds and then immediately cooled to 20 degree Centigrade in 5 seconds, which in turn kills all the Bacteria.**

- **Tetra Brick** **Tetra Brick package is a system of producing brick-shaped cartons from a roll of packaging material.**

CHAPTER 2

RESEARCH METHODOLOGY & PROCEDURES

- 2.1 Research Design**
- 2.2 Respondents of the Study**
- 2.3 Research Instruments**
- 2.4 Treatment of Data**

2.1 RESEARCH DESIGN:

This study is based on *exploratory design*.

In Exploratory research the problem is not defined, therefore the research is conducted to get oneself acquainted with the concept to be studied.

The research on consumer's perception and consumption pattern of processed dairy products is designed to cover all aspects of the acceptance, marketing, packaging, pricing etc. The main objective of the study is to serve the purpose and provide relevant information of the issue in concern.

The types of the dairy products, classification of potential customers, popular brands of dairy products available, segmentation of the products and the marketing & advertising strategies have been kept in view, while designing this report.

During Ramzan & Eid festivals the consumption of Processed dairy products rises significantly.

The criterion of this report is based on the concept of modern technology that has introduced a new way of consuming milk products, how the consumers are reacting towards it & the role played by marketing trends.

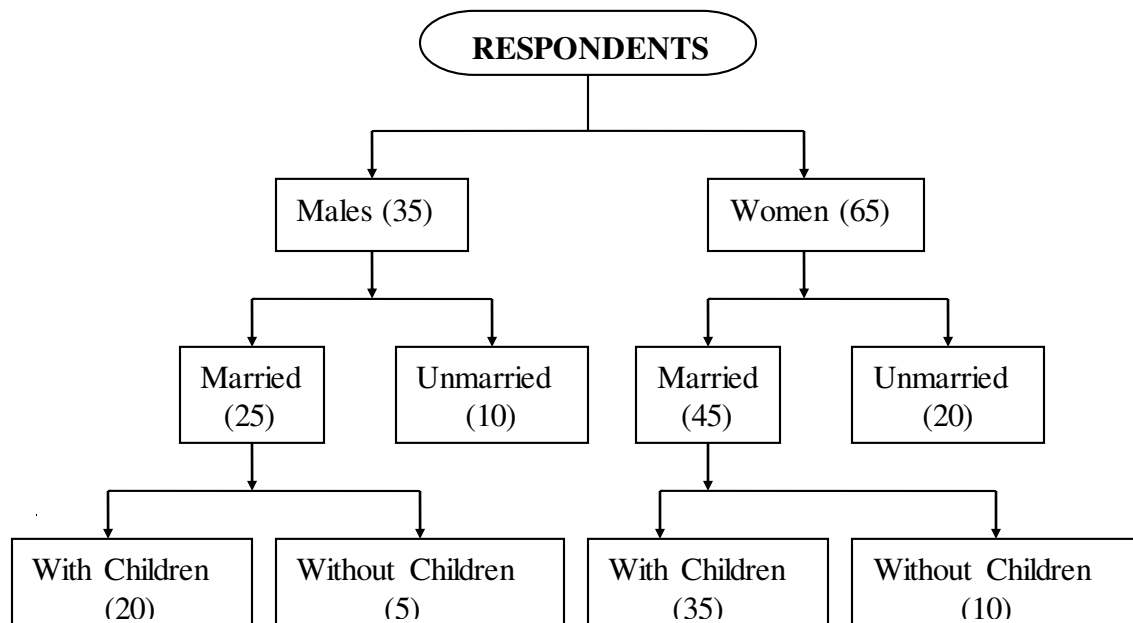
2.2 RESPONDENTS OF THE STUDY:

The respondents for this study were selected randomly at different places. They were all of different ages, gender, marital status & background. Respondents from upper middle & middle class were used so that the results are not narrowed down to one status of people only.

The pattern of structured & non-disguised questionnaire is followed so that all aspects of the project are covered effectively and no important details are left out.

The technique used to determine a sample is random sampling. The sample size consists of 100 respondents in which 35 are males and 65 are females (females being the main customers of the products).

The respondents are further divided according to their marital status. The final details are as follows: **(Fig 2.2)**



2.3 **RESEARCH INSTRUMENT:**

The main research Instruments & sources of data are:

- Questionnaires
- One to one Interviews
- Related websites
- Magazines
- Books
- Personal observations

The Questionnaires are the most important instrument used to gauge the consumer's perceptions and consumption habits.

Interviews comprise of short Questions & all the answers are ticked on a check list by the researcher. Short interviews with the retailers are also conducted in order to cross question the consumers responses. These interviews will be conducted at the sales point.

The Secondary data is collected mainly from the internet and some of it from magazines and personal observations.

The definitions are collected from related books and some secondary data in form of printed material is transferred to computer documents, using scanners for transformation.

To be more specific some suitable and appropriate amendments were made in the data.

2.4 TREATMENT OF DATA:

As the study is of descriptive nature, most of the data was collected in verbal context and has been analyzed in qualitative framework.

The Primary data will be analyzed through both qualitative & quantitative terms.

The Secondary data will be analyzed and interpreted through the statistical tools.

After collecting all the data it is analyzed and interpreted as per requirement of the study.

CHAPTER 3

REVIEW OF LITERATURE & STUDIES

- 3.1 Local Literature**
- 3.2 Foreign Literature**
- 3.3 Gaps to be bridged by this study**
- 3.4 Area for further studies**

3.1 LOCAL LITERATURE

This article is about the establishment of the Indus dairy plant which is being the main attraction of the area. This article also highlights the main differences between the Open milk and the processed milk.

With the revival of the Karachi Milk Plant, citizens can now look forward to a healthier and tastier consumption of dairy products.

Pasteurization and homogenization is the only process to produce hygienic and healthy milk. It's the only way to preserve milk; otherwise it gets fermented and loses its quality in two hours after extracted from an animal.

For the process at Indus dairy milk plant, raw milk is collected from different points in districts Thatta, Badin and Hyderabad. Upon its arrival to the plant, it is first tested at a laboratory by qualified doctors. If considered fit it is then passed through different processes in a scientific manner and packed in half and one liter packets.

The process not only enhances the shelf life of the milk up to eight days in refrigerator, but also reduces the fat level and kills different germs and bacteria.

If the animals have diseases they can be transmitted to human body by milk consumption without proper process of pasturisation. He says that some of the diseases, which can be transmitted into the human body through milk include TB, Hepatitis, and other diseases, often found in animals. Currently, Karachi is being supplied about 4m liters of raw milk 50% short of its actual demand of 8m liters. The shortage is met through packed and dry milk, mainly imported or produced by multinationals and sold at higher prices.

Raw milk is mostly supplied from the cattle market at Landhi and also from interior Sindh. The open milk supplied through hundreds of milk sellers in the city is not considered to hygienic by doctors and food experts.

Experts say that the life of fresh milk is only two hours, which can be enhanced only by proper process at a milk plant, while the open milk being supplied in the city takes more than two hours in transportation, let alone its storage time at main collection and selling points. It is reported that milk dealers and sellers often use different chemicals to preserve the milk from fermentation, which are injurious to human health.

Besides the contamination that the open milk is exposed to during its collection, transportation and at selling points, fat is another issue, which makes open milk unhygienic. The average fat level found in open milk is 7-8% much more than standard 3-3.5%, according to doctors. Doctors say that fatty milk not only creates digestive disorders but also increases the level of cholesterol, which increases chances of cardiovascular diseases.

Interestingly, availability of raw milk in the market is also an issue, which discourages the private sector and government from establishing milk plants for processed milk. Even the administration of the Karachi milk plant complains of short supply of raw milk as one of the major hindrances in the operation of its powder plant.

Food industry development in Pakistan

The food industry works in four phases; production, process, transportation and distribution. Thus we can see how it involves everyone right from a small farmer to a retail distributor. The linkages in this chain are very crucial and a slight disturbance in anyone phase can disrupt the entire cycle.....

..... Our food industry faces several problems at the pre-establishment and post-production stage. Though we have witnessed a phenomenal increase in our industrial base, it is still not enough to absorb our production capacity for instance we import large quantities of edible oil for making vegetable ghee. Some of the major problems include:

- * Political change
- * Monopolistic tendencies
- * Lack of financing capital
- * Non-availability of skilled workers
- * Lack of infrastructural facilities
- * Low capacity utilisation and machinery
- * Transport problems
- * High production costs

Likewise the dairy sector is also an important sector that requires immediate attention. According to estimates, Pakistan's milk production volume has reached 32 million tons, placing us in the top five milk producers in the world. Two thirds of this comes from buffaloes. A survey by the International Farm Comparison Network (IFCN) shows that milk production in Pakistan rose approximately 17 per cent from 1996 to 2002, however our annual milk yield per dairy animal is much less than other countries with lower aggregates.

Other sources of information:

↳ Pakistan small holder Dairy Production and Marketing.

↳ www.thenation.com

By *R.H. Raja*

Animal Husbandry Commissioner/Joint Secretary, Ministry of Food, Agriculture and Livestock (Livestock Wing), Islamabad, Pakistan

↳ Supply and Demand report on Agro-products & Processed Foods. Carried out for the International Trade Center.

↳ Other websites

3.2 FOREIGN LITERATURE

Introduction to Dairy Science and Technology: Milk History, Consumption, Production, and Composition.

This literature is about the study of milk and milk-derived food products from a food science perspective. It focuses on the biological, chemical, physical, and microbiological aspects of milk itself, and on the technological (processing) aspects of the transformation of milk into its various consumer products, including beverages, fermented products, concentrated and dried products, butter and ice cream.

Milk is as ancient as mankind itself, as it is the substance created to feed the mammalian infant. All species of mammals, from man to whales, produce milk for this purpose. Many centuries ago, perhaps as early as 6000-8000 BC, ancient man learned to domesticate species of animals for the provision of milk to be consumed by them. These included cows (genus *Bos*), buffaloes, sheep, goats, and camels, all of which are still used in various parts of the world for the production of milk for human consumption.

Fermented products such as cheeses were discovered by accident, but their history has also been documented for many centuries, as has the production of concentrated milks, butter, and even ice cream.

Technological advances have only come about very recently in the history of milk consumption, and our generations will be the ones credited for having turned milk processing from an art to a science. The availability and distribution of milk and milk products today in the modern world is a blend of the centuries old knowledge of traditional milk products with the application of modern science and technology.

The role of milk in the traditional diet has varied greatly in different regions of the world. The tropical countries have not been traditional milk consumers, whereas the more northern regions of the world, Europe (especially Scandinavia) and North America, have traditionally consumed far more milk and milk products in their diet. In tropical countries where high temperatures and lack of refrigeration has led to the inability to produce and store fresh milk, milk has traditionally been preserved through means other than refrigeration, including immediate consumption of warm milk after milking, by boiling milk, or by conversion into more stable products such as fermented milks.

World-wide Milk Consumption and Production

The total milk consumption (as fluid milk and processed products) per person varies widely from highs in Europe and North America to lows in Asia. However, as the various regions of the world become more integrated through travel and migration, these trends are changing, a factor which needs to be considered by product developers and marketers of milk and milk products in various countries of the world.

Even within regions such as Europe, the custom of milk consumption has varied greatly. Consider for example the high consumption of fluid milk in countries like Ireland and Sweden compared to France and Italy where cheeses have tended to dominate milk consumption. When you also consider the climates of these regions, it would appear that the culture of producing more stable products (cheese) in hotter climates as a means of preservation is evident. Table 1 illustrates milk per capita consumption information from various countries of the world. Table 2 shows the quantity of raw milk produced around the world.

How to buy Dairy Products

The many kinds of milk and dairy products on the market today give consumers a tempting variety of delicious foods from which to choose.

Points to Consider

Wholesomeness...quality...nutritive value... convenience...and informative labeling are some of the points to consider when purchasing dairy products.

Wholesomeness

Before grading or inspection of a dairy product is provided, the processing plant must meet the U.S. Department of Agriculture's specifications for quality and sanitation. A USDA dairy inspector checks the plant, incoming raw products, and processing and packaging techniques.

Nutritive Value

Milk products provide varying amounts of protein, fat, saturated fat, cholesterol, carbohydrate, vitamins, and minerals. Of all milk products, milk, yogurt, and cheese are the best sources of calcium. Some milk products contain added sugars. Some are high in sodium or fat, especially saturated fat, while others are low. Although butter is made from cream, nutritionally it is a fat and is not in the milk group of the Food Guide Pyramid. Use the *Nutrition Facts* panel on each individual product label to learn about the nutrient content of that food and how it fits into an overall daily diet.

Choose a diet low in fat, saturated fat, and cholesterol to help reduce the risk of getting certain diseases and to help maintain a healthy weight. The Dietary Guidelines for Americans suggest choosing a diet containing 30 percent or less of calories from fat and less than 10 percent of calories from saturated fatty acids. Also, some health authorities suggest that dietary cholesterol be limited to an average of 300 milligrams or less per day.

Dairy Facts

- Milk available in stores today is usually pasteur-ized and homogenized. Very little raw milk is sold today.
- In pasteurizing, milk is heated briefly to kill pathogens and harmful bacteria. Then, it is rapidly chilled.
- Homogenized milk has been processed to reduce the size of the milkfat globules so the cream does not separate and the product stays uniform throughout.

3.3 GAPS TO BE BRIDGED BY THIS STUDY:

Following are the gaps bridged by this study:

- ↳ Advertising of Processed Dairy products to increase consumer awareness.
- ↳ Factors that influence consumers most, while purchasing dairy products.
- ↳ Most consumed Brand, the reason for its success and why other brands could not do the same.
- ↳ The pricing analysis of the three brands under research.
- ↳ Consumer Satisfaction.
- ↳ Availability of Processed milk.

3.4 AREAS FOR FURTHER STUDIES

Area that can be pursued for further research relating to this topic are :

- Study of difference between the marketing strategies of different Processed dairy products' Brands and how to improve their overall Promotional Campaign.
- Impacts on the Pakistan economy by the on going trend of producing Processed dairy products.
- Pakistan's Dairy Production level relating to import and export of milk.
- A feasibility study for establishing a Processed Dairy production Plant in Karachi.

CHAPTER 4

PRESENTATION ANALYSIS

- 4.1 About the Questionnaire**
- 4.2 Analysis of the Questionnaire**
- 4.3 Interview Analysis**

4.1 ABOUT THE QUESTIONNAIRE:

The analysis and the details of the report presented is based on the questionnaire. Each and every question is graded which help analyzing the response of consumers perception and consumption pattern of processed dairy milk in contrast to open milk. Processed milk being the core focus of the research is evaluated in the questionnaire. Butter and yogurt are evaluated through interviews and are not included in the questionnaire so that it remains easy for the respondents to fill it and it provides a clear & in-depth information for the researcher to evaluate.

The Questionnaire is divided in parts. The first part which comprises of question 1-6 is the general information part which will help to analyze the consumers perceptions while purchasing milk. This part is to be filled by the consumers of processed and open milk both.

The second part comprises of question 7-11 which are to be filled only by the consumers of processed milk. This part covers different aspects described further in this chapter.

Finally the third part of the questionnaire probes deeper into the reason why or why not the consumers are using processed milk and to identify the potential of processed milk in the markets, the strengths and weaknesses.

In the end a brief section of personal information covers the background information of the respondents.

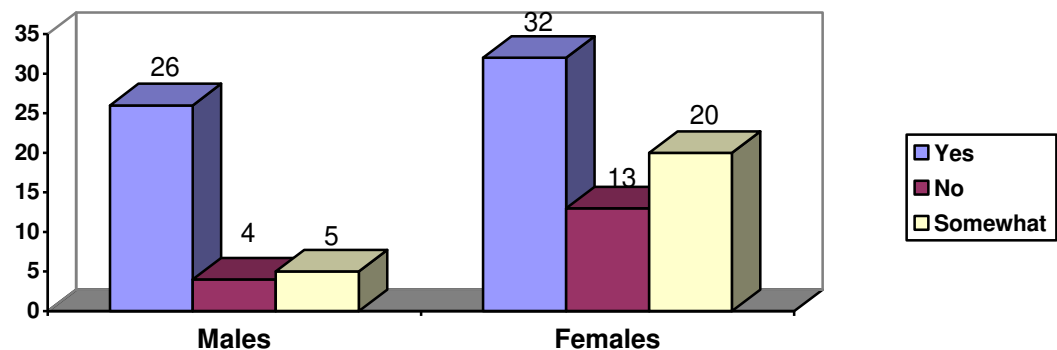
4.2 ANALYSIS OF THE QUESTIONNAIRE :

Q.1) Are you health conscious?

Table 1.1

Responses	Males	Females	% Males	% Females
Yes	26	32	75 %	49 %
No	4	13	11 %	20 %
Somewhat	5	20	14 %	31 %
Total	35	65	100 %	100 %

Figure 1.1



This question is to gauge the consumers interest in matters of dairy consumption. Whether it be Processed dairy products or open, it is important that the respondent is a health conscious person to take the consumption of dairy products as a serious issue.

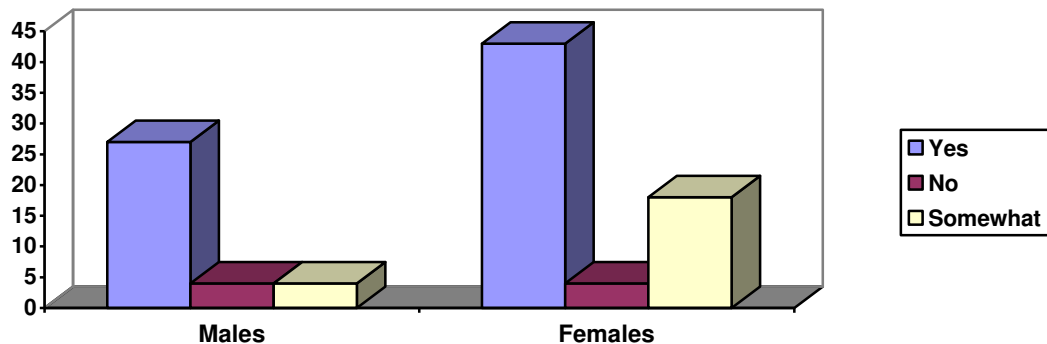
As the Responses show, majority of the people are health conscious in both male and female categories.

Q.2) Does the brand name and image effect your buying of a product ?

Table 2.1

Responses	Males	Females	% Males	% Females
Yes	27	43	75 %	49 %
No	4	4	11 %	20 %
Somewhat	4	18	14 %	31 %
Total	35	65	100 %	100 %

Figure 2.1



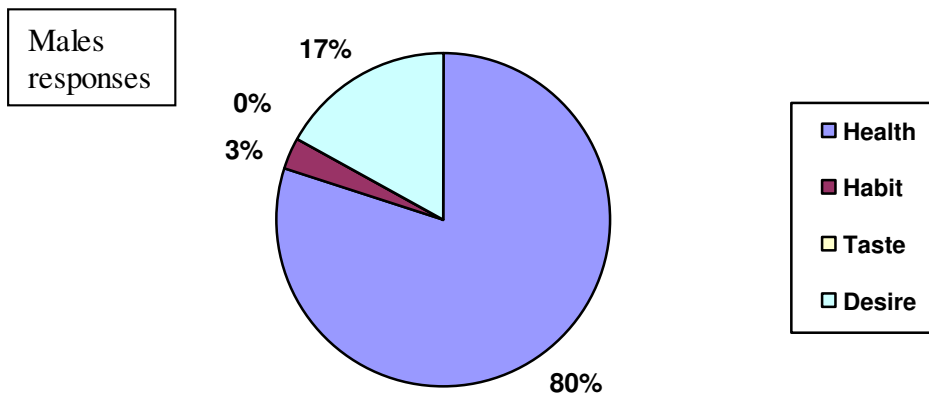
The purpose of asking this question is to know whether the respondents are brand conscious or not. When we talk about processed dairy products it is obvious that there are brands involved when produce the processed dairy products. In this case the research is covering these brands namely Nestle, Haleeb and Millac. It is important to know that if people are brand conscious, to which brand they would like to associate themselves to. Here majority of the people said yes to being brand conscious, Especially males are more brand conscious than the females.

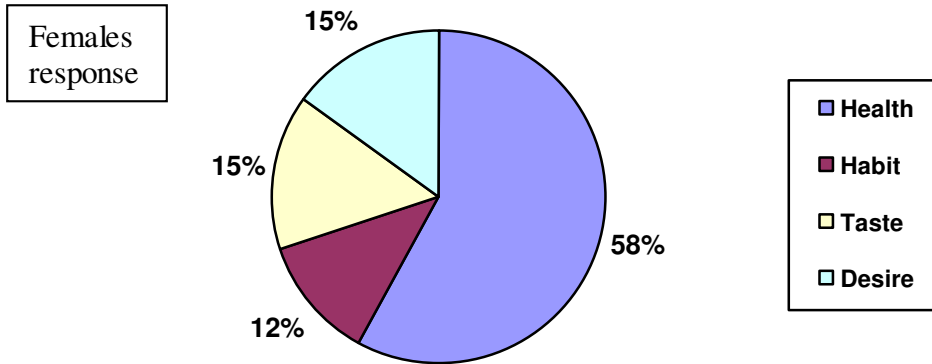
Q.3) What need do you associate with milk?

Table 3.1

Responses	Males	Females	% Males	% Females
Health	28	37	80 %	58 %
Habit	1	8	3 %	12 %
Taste	0	10	0 %	15 %
Desire	6	10	17 %	15 %
Total	35	65	100 %	100 %

Figures 3.1 & 3.2





This question aims at finding out the main reason why consumers purchase and consume milk. Out of the four factors given in the question, majority of both males and females rank health at top, seconded by desire for milk. These are the two core reasons consumers preference for the consumption of milk.

Q.4) How often do you purchase milk?

Table 4.1

Responses	Males		Females	
	Married	Unmarried	Married	Unmarried
Daily	15	6	28	12
Weekly	7	3	8	7
Other	3	1	9	1
	25	10	45	20
Total	35		65	

Figure 4.1.1

Male's Responses

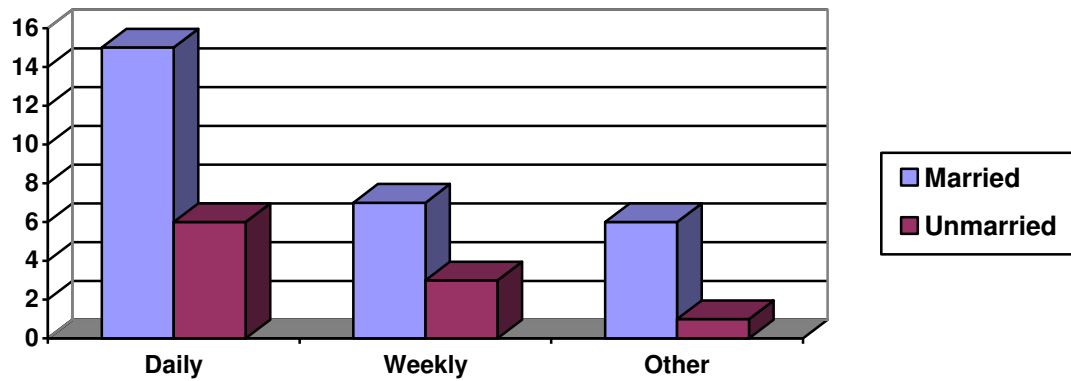
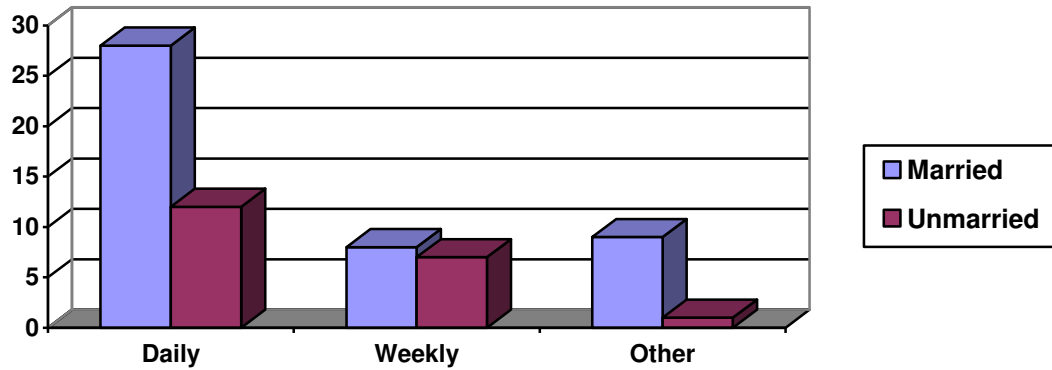


Figure 4.1.2

Female's responses



The purpose of asking this question is to increase the knowledge about the purchasing behavior of the customers to know the purchasing pattern of dairy milk.

Here we can see that most of the people purchase milk on a daily basis. There are two reasons for this. First, because many people purchase open milk which is bought daily. Second, most of the consumers do not want to store milk for the whole week or more. Both males and females mostly buy milk daily.

Married women also buy processed milk monthly in cartons of 1-1/2 liter packs.

Q.5) How much does each of the following factors influence your decision of milk purchase ?

Hygiene, Price, Brand, Package, Recommendation & Place of purchase.

Table 5.1

Males						
	Married (25)			Unmarried (10)		
Responses	Very Influential	Somewhat Influential	Not Influential	Very Influential	Somewhat Influential	Not Influential
Hygiene	21	4	0	5	5	0
Price	5	14	6	0	9	1
Brand	6	12	7	3	7	0
Package	7	13	5	2	6	2
Recommend	0	12	13	1	7	2
Place	4	14	7	3	4	3

Figure 5.1.1 (Married)

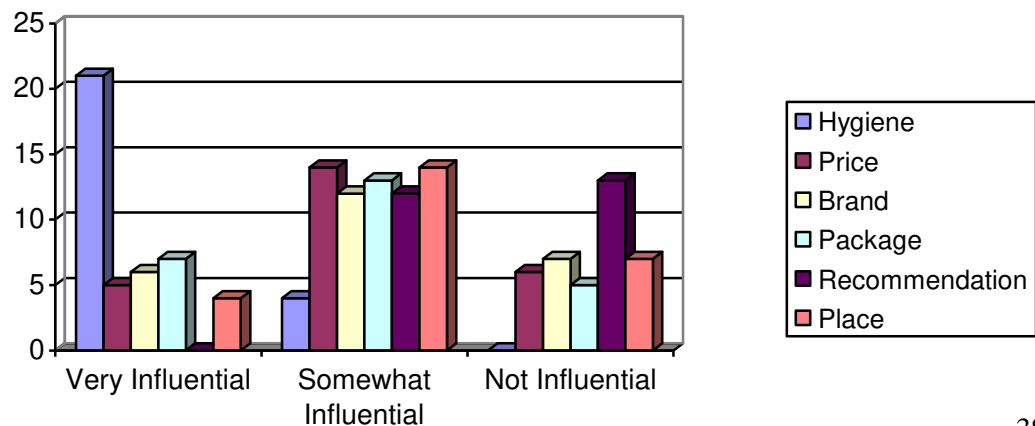


Figure 5.1.2 (Unmarried)

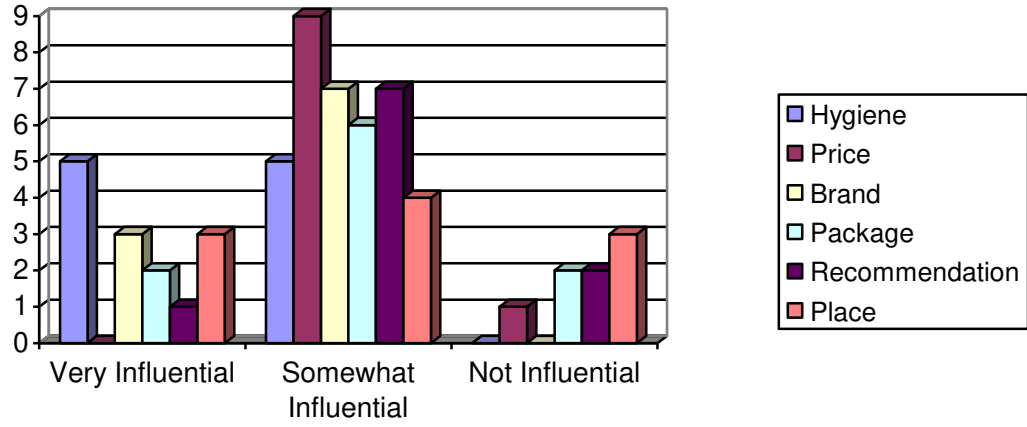


Table 5.2

Females						
	Married (45)			Unmarried (20)		
Responses	Very Influential	Somewhat Influential	Not Influential	Very Influential	Somewhat Influential	Not Influential
Hygiene	31	12	2	16	4	0
Price	19	23	3	2	13	5
Brand	25	20	0	10	8	2
Package	25	16	4	7	9	4
Recommend	15	19	11	4	11	5
Place	9	19	17	10	6	4

Figure 5.2.1 (Married)

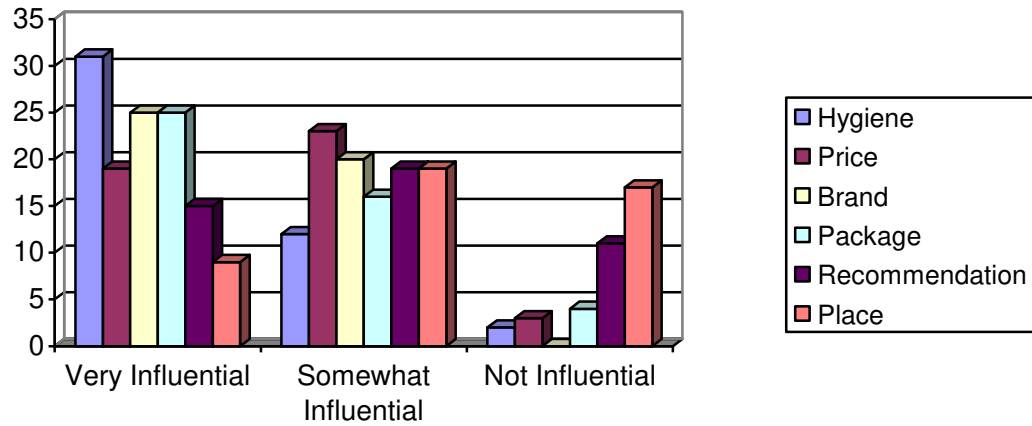
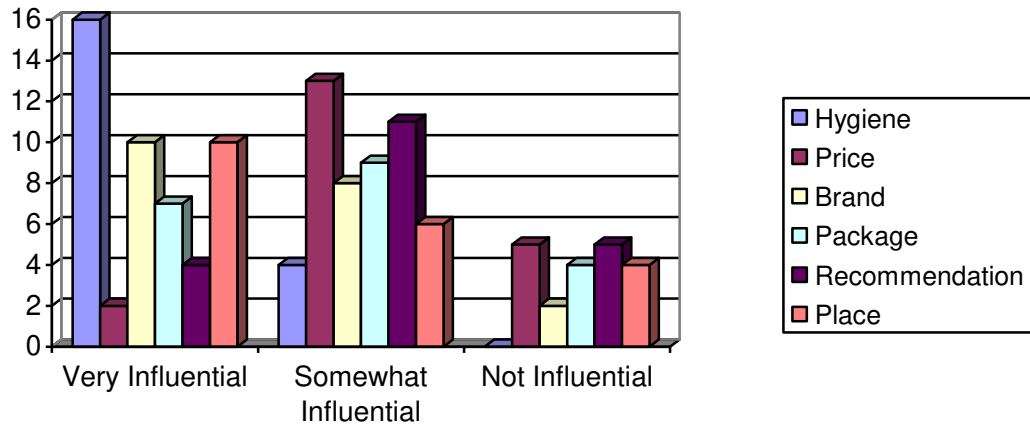


Figure 5.2.2 (Unmarried)



This question finds out the influential factors that have an impact on the consumers mind while purchasing dairy milk.

The respondents are divided according to genders and marital status. This is done in order to analyze the difference of perceptions between the two.

Married males rank Hygiene as the most influential factor, because they are concerned about health of their families. They think Price and Place of purchase is somewhat

influential and Recommendation not at all influential, because they themselves are the decision makers.

Unmarried males on the other hand do consider Hygiene as influential but they are more concerned towards the pricing factors because of their limited budget, they perceive price as the most influential factor. They think place of purchase does not matter at all.

Females both married and unmarried rate hygiene as the most influential factor but they are also almost equally brand conscious.

Both think price is also influential but unmarried females also consider Recommendation because they live with their families and do not have the complete decision making power. Married females do not give importance to the place of purchase, because they mostly buy the groceries from the nearest shop in their locality.

**Q.6) Which type of milk do you buy frequently ?
Processed or Open?**

Table 6.1

Males			
Responses	Married		Unmarried
	With Children	Without Children	
Processed milk	10	1	4
Open milk	10	4	6
Total	20	5	10
	25		10
	35		

Figure 6.1

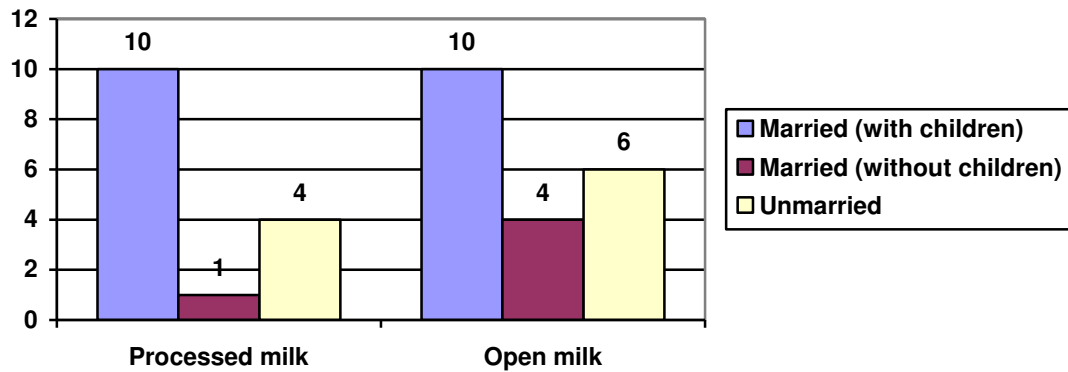
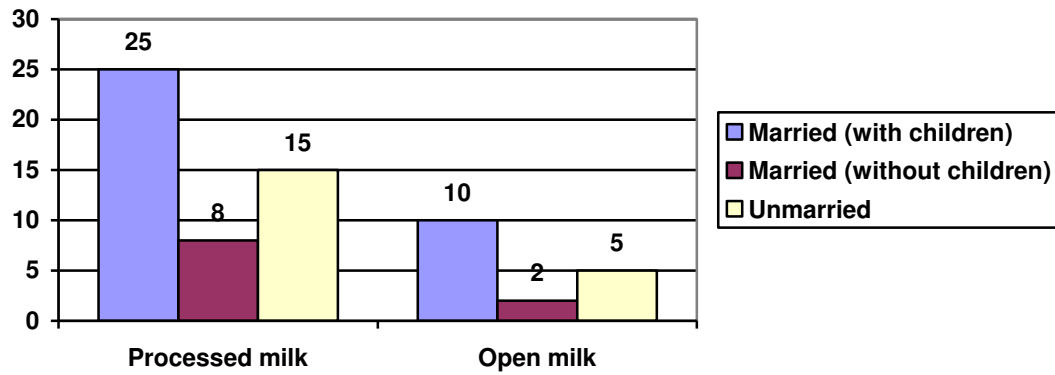


Table 6.2

Females			
Responses	Married		Unmarried
	With Children	Without Children	
Processed milk	25	8	15
Open milk	10	2	5
Total	35	10	20
	45		20
	65		

Figure 6.2



This is a filtering question which filters out the consumers of open milk & leaves behind the consumers of processed milk for further probing.

Married males with children are equal users of both processed and open milk whereas, majority of married men without children use open milk. Unmarried males majority consumes Open milk.

As far as females are concerned, with and without children are the major consumers of Processed milk, because they think it is the best for their children and families. Here majority of unmarried females also consume Processed milk. This proves the supposition, (mentioned in the Respondents of the Study), that females are the main consumers of Processed dairy products.

The question has filtered out 15 male and 48 female consumers of Processed dairy products.

Questions (7-11) for processed milk consumers only.

Q.7) Which brand of processed milk do you purchase?

Nestle, Haleeb or Millac?

Table 7.1

Males			
Responses	Married		Unmarried
	With Children	Without Children	
Nestle	8	0	4
Haleeb	2	1	0
Millac	0	0	0
	11		4
	15		

Figure 7.1

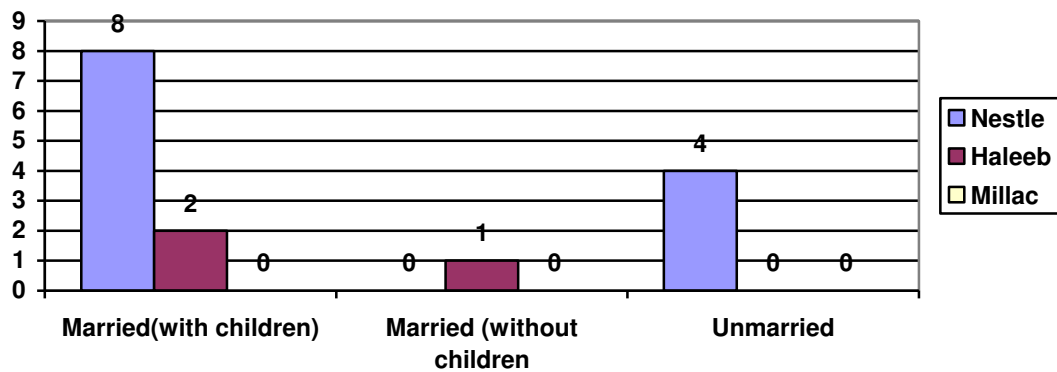
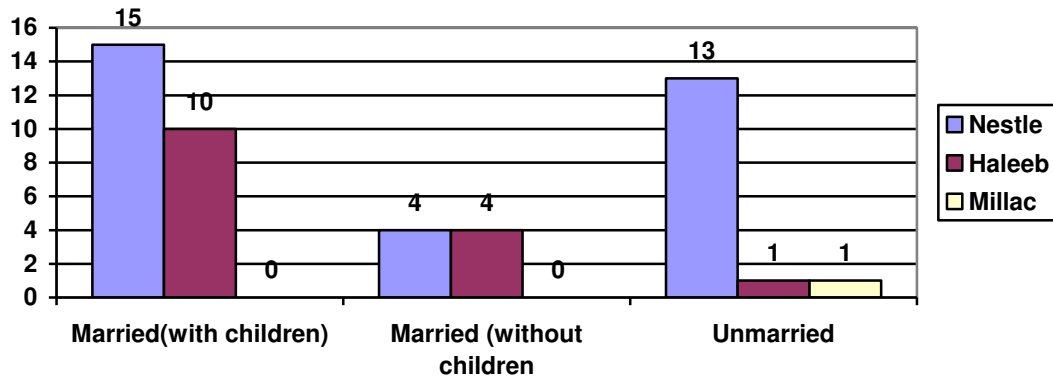


Table 7.2

Females			
Responses	Married		Unmarried
	With Children	Without Children	
Nestle	15	4	13
Haleeb	10	4	1
Millac	0	0	1
	33		15
	48		

Figure 7.2



The objective of this question is to find out the most preferred Brand of the three brands that are included in the research namely, (Nestle, Haleeb & Millac).

The respondents are again divided into categories according to their gender & marital status to get an in-depth view of the preferences of different categories of people.

Majority of males, married and unmarried purchase Nestle and 0% people are Millac consumers.

Majority of married females with children purchase Nestle milk, but here Haleeb is also preferred by contrast to males. Married females without children are equal consumers of both Nestle and Haleeb . Likewise majority of unmarried females also consume Nestle. Millac is not preferred at all.

This shows us that the most purchased Brand is “Nestle”.

Q.8) Why are you using the above ticked brand?

Hygiene, Price, Brand name, Out of Habit, Recommendation and Advertisement.

Table 8.1

	Males		Females	
Respondents	Married	Unmarried	Married	Unmarried
Hygiene	* * * * *	* * *	***** *****	***** ***
Price	* * *	*	*	* *
Brand Name	* * * *	* * *	***** **	* * * *
Out of Habit	*	-	* * * * *	* * * * *
Recommendation	-	-	* * * * *	*
Advertisement	* * *	-	*	* *

This question is used to find out the main reason(s) for the success of the most purchased Brand (i.e Nestle). The analysis is done in a different way as compared to the previous analysis. Since the respondents here selected more than one reasons given in the Questionnaire it was not possible to put it in numbers as previously done.

Therefore for every checked option a sterik is placed in the table and the biggest clutter represents the main reason of purchasing the preferred Brand.

In case of male respondents Hygiene is the main reason and for females both Hygiene and Brand name are the main reasons for purchasing Nestle.

Q.9) Rank the following Brands (1st, 2nd, 3rd)

Nestle, Haleeb & Millac

Table 9.1

Responses	Males (15)			Females (48)		
	1 st	2 nd	3 rd	1 st	2 nd	3 rd
Nestle	***** ***	* * *	-	***** *****	***** ***	* *
Haleeb	* *	***** **	* *	***** *****	***** *****	* * *
Millac	-	* *	***** ****	-	*****	***** *****

This question is a simple ranking of the three Brands under research to know the consumers perceptions about them regardless of the fact that they consume them or not. The technique used to analyze this question is similar to the previous question. The results show that both males and females have ranked,

- 1st ----- Nestle
- 2nd ----- Haleeb
- 3rd ----- Millac

Q.10) Would your ranking change if the prices of the brand changes?

Yes or No ?

Table 10.1

Responses	Males		Females	
	Married	Unmarried	Married	Unmarried
Yes	3	1	8	12
No	8	3	25	3
Total	15		48	

Figure 10.1.1 (Males)

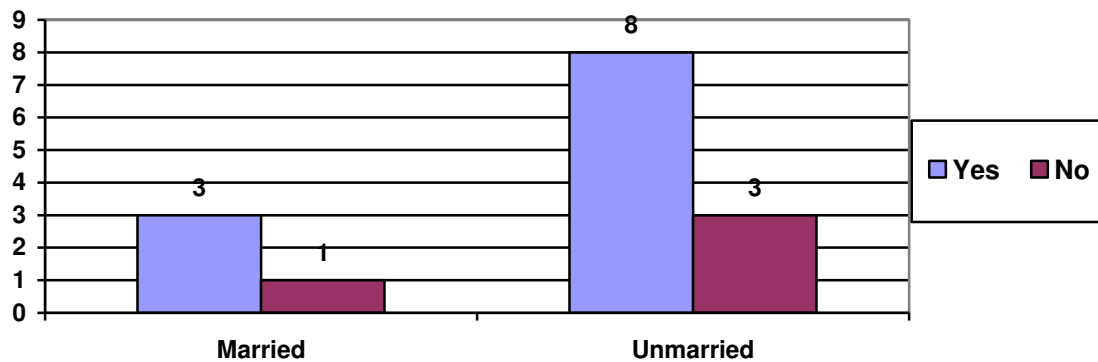
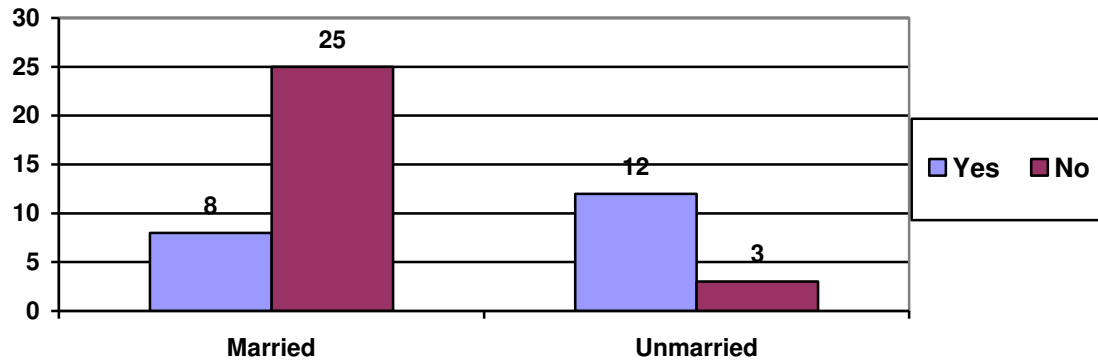


Figure 10.1.2 (Females)



The objective of this question is to analyze the respondents' price sensitivity towards the three brands. This question cross-examines the responses earlier responses, as to why they preferred their Brands, and whether it is price of the Brand that has a major impact on the buying behavior and perceptions or not.

The results show that both married and unmarried male's and female's perception and ranking would change with the change in prices, whereas the married females perception do not change with the price changes.

This shows the males are more price conscious but Females, especially married give more importance to other factors such as Health & Hygiene rather than price while purchasing Processed milk.

Q.11) Are you satisfied with your current brand?

Yes or No?

Table 11.1

Responses	Males		Females	
	Married	Unmarried	Married	Unmarried
Yes	11	4	30	14
No	0	0	3	1
Total	14		48	

Figure 11.1.1 (Males)

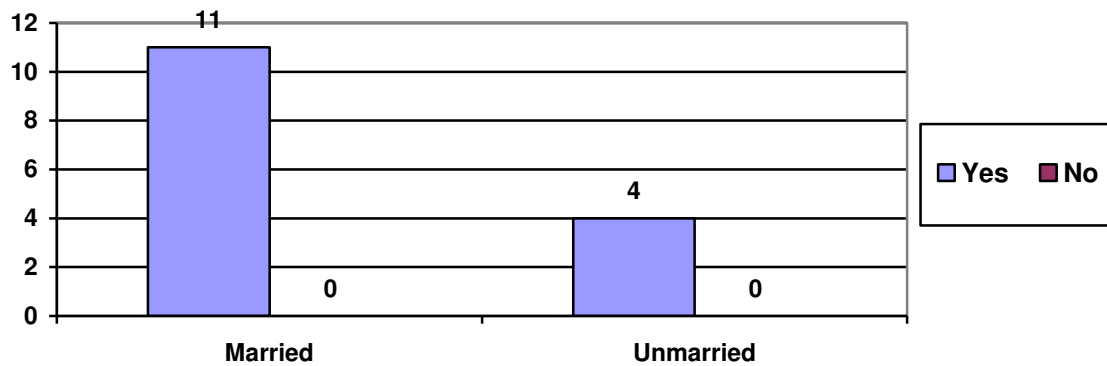
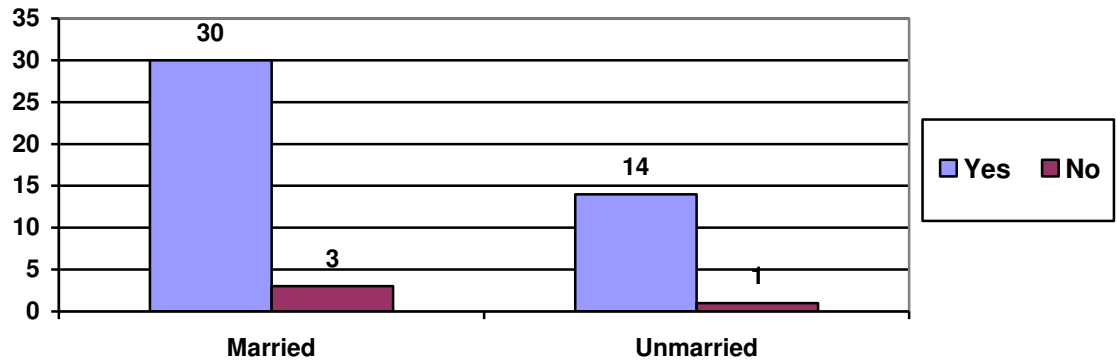


Figure 11.1.2 (Females)



This question is a dichotomous type of question to know whether the consumers are satisfied with their current Brand of Processed milk or not. This question analyzes the consumer's Satisfaction level.

The results show that males (married and unmarried both) are completely satisfied with their current Brand. And majority of females (both married and unmarried) are also satisfied.

Continuing general questions (for both pure and processed milk users).

Q.12) Do you feel any quality difference between Open milk and processed milk?

Yes, No or Somewhat?

If yes, which is better? Processed or Open milk?

Table 12.1

	Males			Females		
Responses	Married		Unmarried	Married		Unmarried
	With children	Without children		With children	Without children	
Yes	14	3	4	25	8	17
No	3	0	0	0	0	0
Somewhat	3	2	6	10	2	3
Total	20	5	10	35	10	20

Figure 12.1.1 (Males)

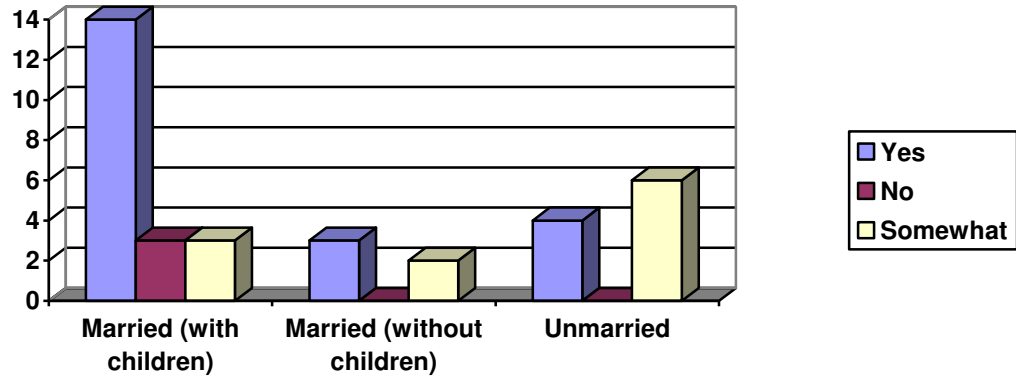
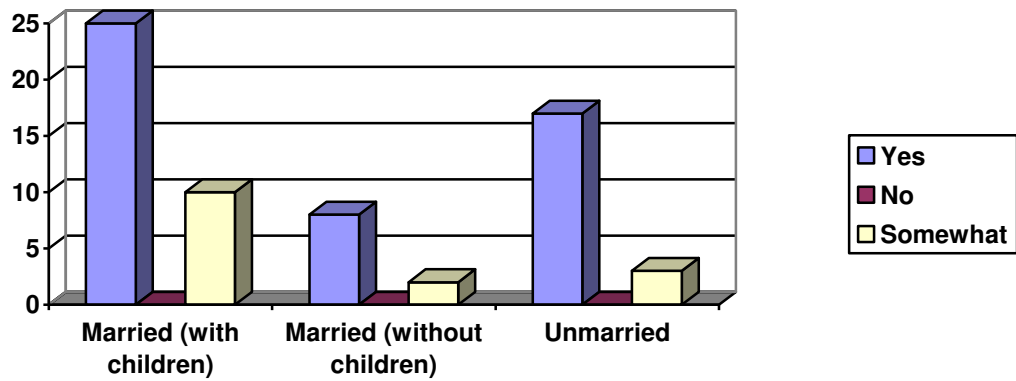


Figure 12.1.2 (Females)



This question is again a dichotomous type question is to find out the difference in the consumers perceptions of Processed and Open milk.

Majority of both males and females feel a quality difference between Open & Processed milk.

Which is better?

Responses of people who said yes to the 1st part of the question.

Table 12.2

Responses	Males			Females		
	Married		Unmarried	Married		Unmarried
	With children	Without children		With children	Without children	
Processed	9	1	4	30	8	16
Open	11	4	6	5	2	4
Total	20	5	10	35	10	20

Figure 12.2.1 (Males)

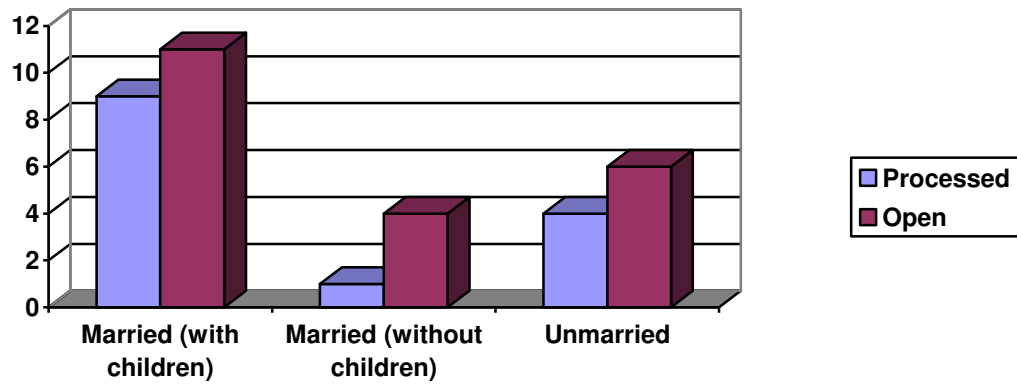
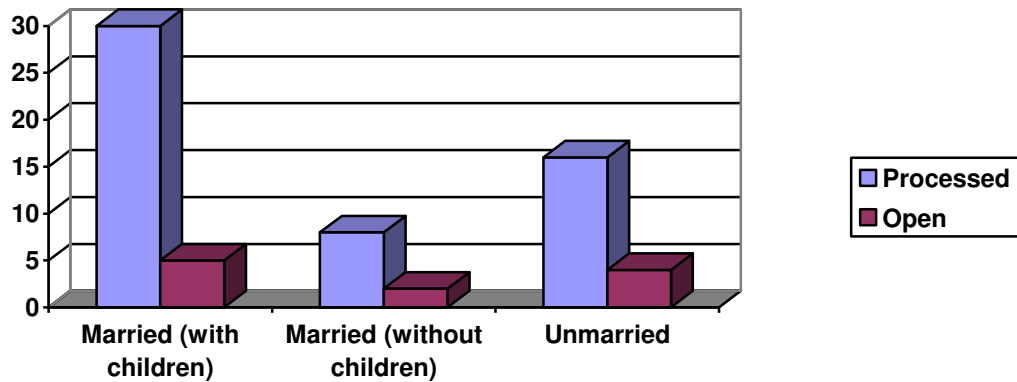


Figure 12.2.2 (Females)



The second part of the question is for respondents who gave an affirmative answer to the first part of the question. The second part was asked to rank the better of the two above given options (i.e Processed and Open milk).

Here it is interesting to note that the results of both genders are completely opposite to each other.

Majority of the males ranked Open milk better than Processed milk but the difference is comparatively lesser to the females who are of the opinion the Processed Daily milk is definitely better than Open milk.

Q.13) Which type of milk do you use for Making tea, Drinking and Cooking plain?

Open, Processed or Powdered ?

Table 13.1

Males						
	Married (25)			Unmarried (10)		
Responses	Open milk	Processed milk	Powdered milk	Open milk	Processed milk	Powdered milk
Making Tea	13	3	9	5	4	1
Drinking	12	13	0	6	3	1
Cooking	13	12	0	6	3	1

Figure 13.1.1 (Married)

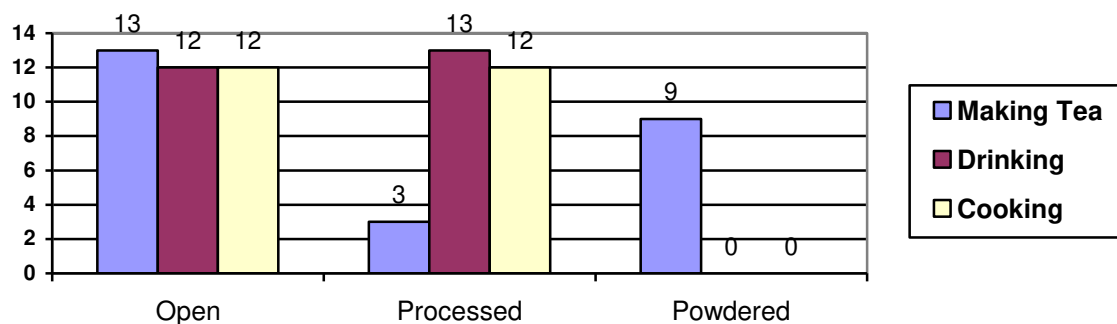


Figure 13.1.2 (Unmarried)

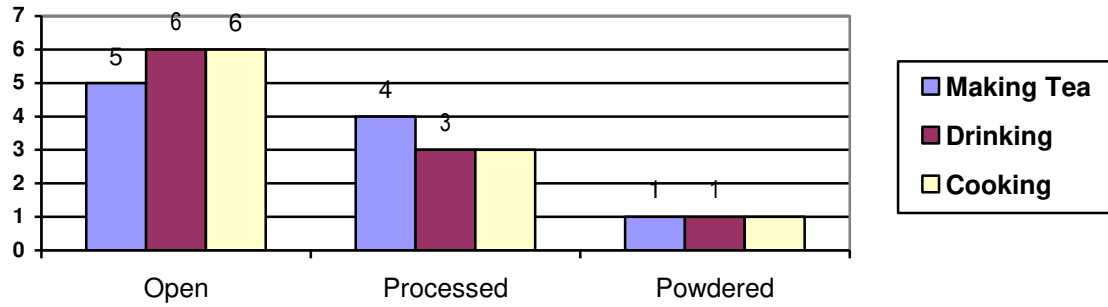


Table 13.2

Females						
Responses	Married (45)			Unmarried (20)		
	Open milk	Processed milk	Powdered milk	Open milk	Processed milk	Powdered milk
Making Tea	14	19	12	6	7	7
Drinking	9	31	5	6	12	2
Cooking	18	25	2	6	12	2

Figure 13.2.1 (Married)

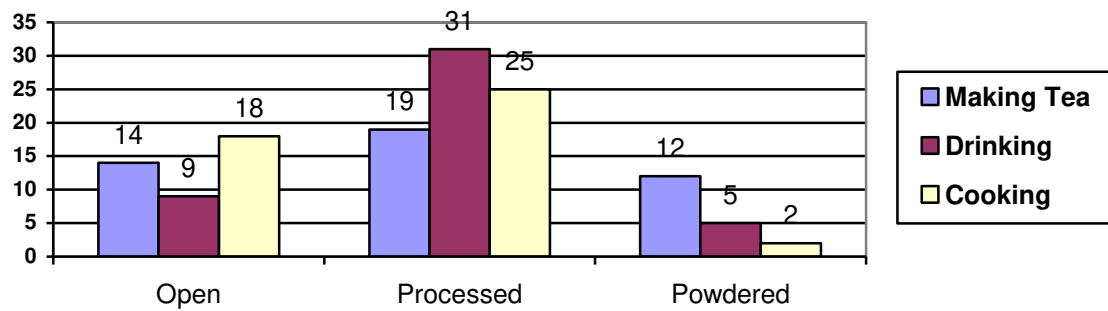
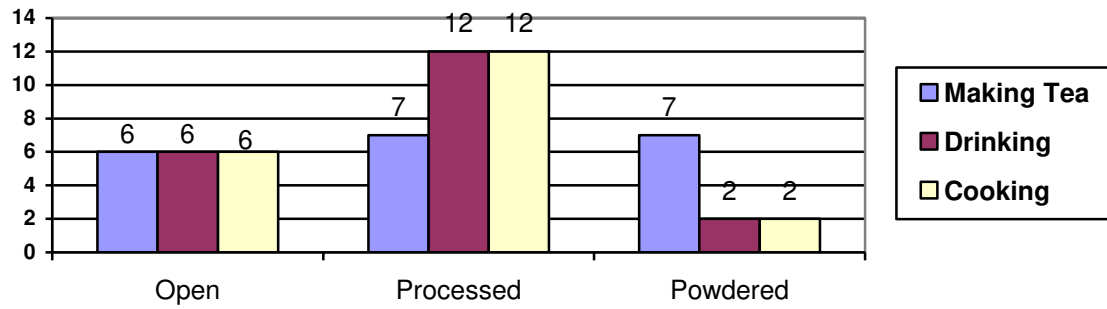


Figure 13.2.2 (Unmarried)



This question is used probe further into the consumption pattern of Dairy milk. The three uses namely Making tea, Drinking and Cooking are the main uses of milk and this question will show where Processed dairy milk is leading and where it is bending.

Q.14) If you are Open milk user, would you prefer processed milk if its price is decreased?

Yes or No?

First part of the question is for open milk users only.

Table 14.1

Responses	Males		Females	
	Married	Unmarried	Married	Unmarried
Yes	2	3	5	2
No	12	3	7	3
Total	14	6	12	5

Figure 14.1.1 (Males)

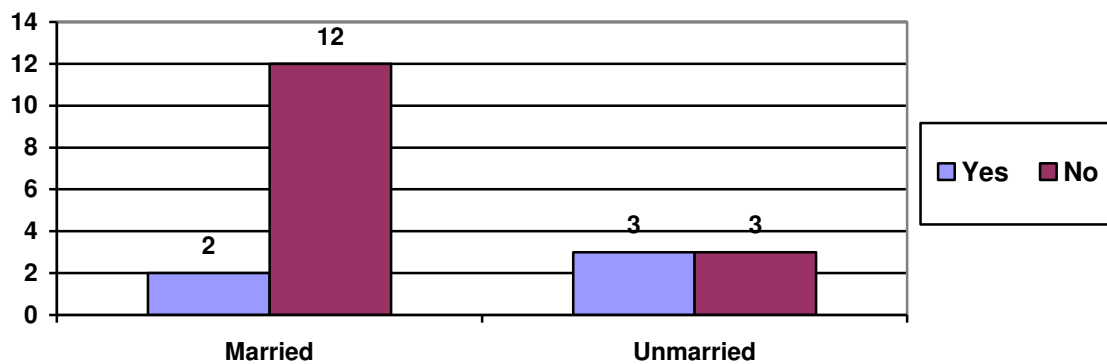
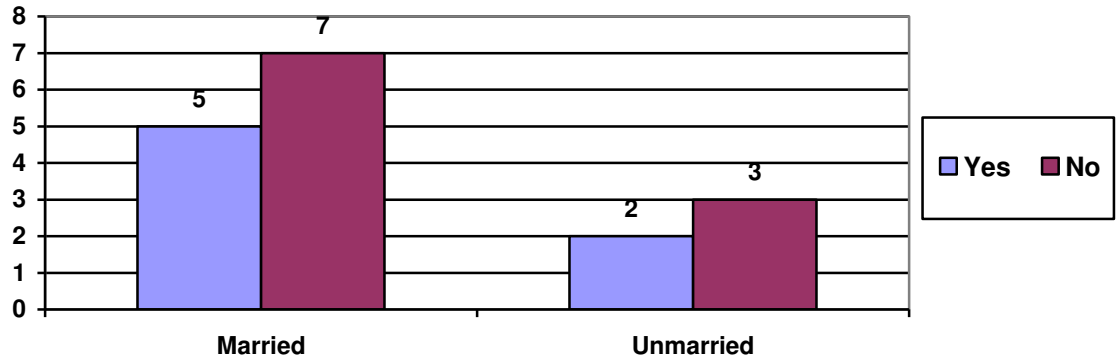


Figure 14.1.2 (Females)



This question again checks the price sensitivity of the consumers and the potential of becoming Processed milk consumers if the prices of Processed milk are reduced. Majority of married males said Yes they would switch to processed milk if the prices are decreased. Unmarried males gave an equal positive & negative response.

Here again the females have an opposite opinion. Majority of the Open milk users would not switch to Processed if the prices are decreased.

Second part of this question is for the users of processed dairy milk.

If you are a Processed milk user, would you switch to open milk if the prices of you brand increases?

Yes or No?

Table 14.2

Responses	Males		Females	
	Married	Unmarried	Married	Unmarried
Yes	3	2	8	2
No	8	2	25	13
Total	11	4	33	15

Figure 14.2.1 (Males)

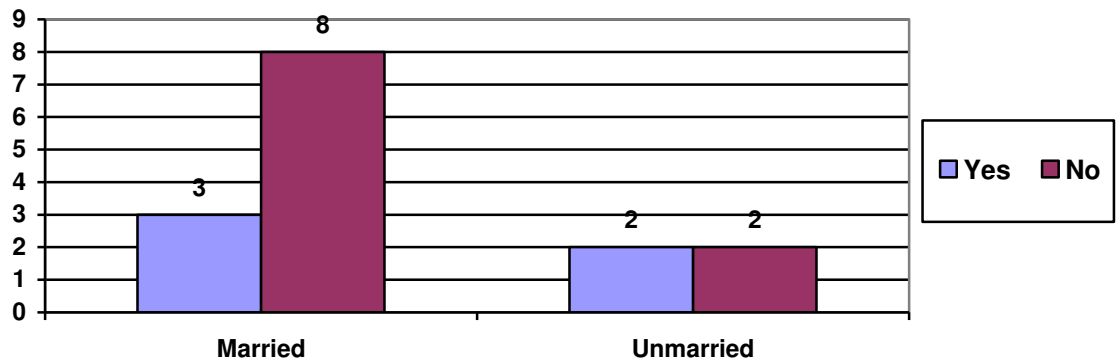
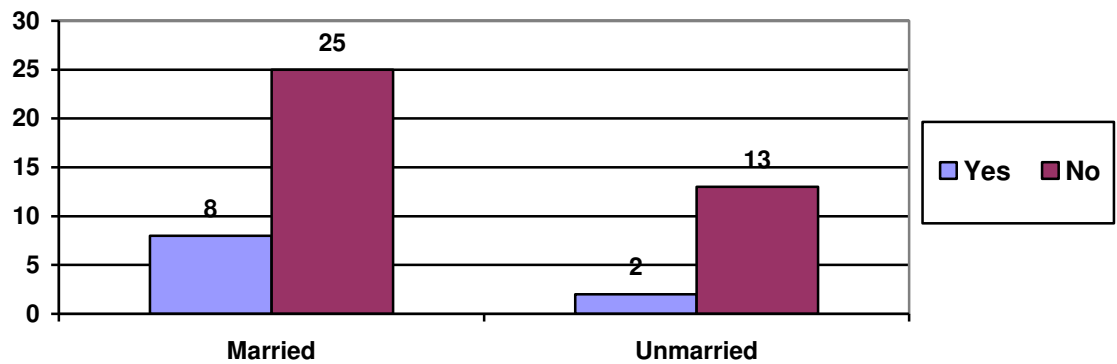


Figure 14.2.2 (Females)



The second part of the question is vice versa to the first part. It inquires whether the respondents would switch to Open milk if the prices of Processed milk are increased.

Married males will not change their preference due to the increase in price. Unmarried men remain equal.

Similarly both married and unmarried female respondents would not switch to Open milk even if the price of their Brand increases.

The results show that Open milk users are price-conscious and are potential customers for Processed milk if their prices are decreased.

On the other hand, Processed milk users have a high satisfaction with their milk and will not change the preference due to increase in price.

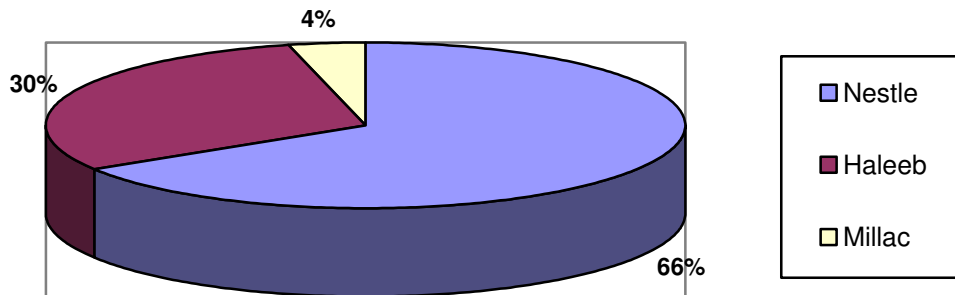
Q.15) Which brand's advertisement do you remember most?

Nestle, Haleeb or Millac?

Table 15.1

Response	Respondents	Percentage
Nestle	66	66%
Haleeb	30	30%
Millac	4	4%
Total	100	100 %

Figure 15.1



This question analyzes the Brand recall in the consumers mind concerning Advertisement. The purpose of this question is to find out which Brand has the strongest advertising campaign and which Brand needs to further work on improving its advertising strategies.

The results show that the major chunk of the pie, that is 66% of the respondents recall Nestle's advertisement with ease, 30% recall Haleeb & a mere 4% recall Millac.

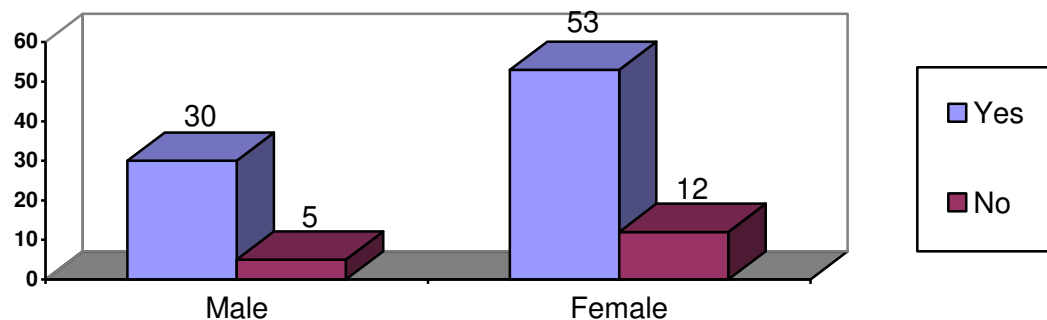
Q.16) Is your preferred milk always available in the market?

Yes or No?

Table 16.1

Response	Respondents		Percentage	Percentage
	Males	Females	Female	Male
Yes	30	53	85%	81%
No	5	12	15%	19%
Total	35	65	100%	100%

Figure 16.1



This question is another dichotomous question to inquire about the availability of the milk in the market. This question analyzes consumers perception for the availability of their preferred milk. It will also help to find out whether the Processed milk Brands are lacking in the adequate distribution of milk in the market.

The results show that majority of the respondents both male and female are satisfied with the availability of their preferred milk in the market.

Q.17) If you change your Brand, (or type of milk) for which of the following reasons would you switch for?

Price, Quality, Hygiene, Advertisement, Word of mouth, Taste, Availability, etc.

Table 17.1

Responses	Males			Females		
	Married		Unmarried	Married		Unmarried
	With children	Without children		With children	Without children	
Price	****	*	**	***** ****	**	*****
Quality	***** *****	*****	*****	***** *****	****	***** *****
Hygiene	*****	*	***	***** *****	**	***** **
Advertisement	-	-	*	****	-	-
Word mouth	**	-	-	*****	-	*
Taste	*****	***	***	***** *****	*****	***** *
Availability	*****	**	**	***** *****	***** *	*****
Etc	-	*	*	-	-	-

This question is used to find out the reasons the brands are losing their consumers and vice versa (that why are Open milk users switching to Processed milk).

Secondly this question will also highlight the core factors which influence on the consumers Perception and Consumption pattern of Dairy milk.

Married & unmarried males will change their type of milk for lack of Quality mainly and then Taste.

Females who are married will change their preferred milk due to lack of Quality, Hygiene and Taste.

Therefore Quality and Taste being common in all categories are the main reasons consumers would switch for.

PERSONAL INFORMATION OF THE RESPONDENTS:

Gender:

Gender	Respondents	Percentages
Male	35	35%
Female	65	65%
Total	100	100 %

Age:

Ages	Respondents	Percentages
20 – 25	63	63%
26 – 35	10	10%
36 – 45	16	16%
46 & above	11	11%
Total	100	100 %

Status:

Status	Respondents	Percentages
Employed	46	46%
Unemployed	8	8%
Housewife	16	16%
Student	30	30%
Total	100	100 %

Marital Status:

Marital Status	Respondents	Percentage
Married	70	70%
Unmarried	30	30%
Total	100	100 %

Income Level:

Income Level	Respondents	Percentages
5000 – 10000	43	43%
11000 – 19000	19	19%
20000 – 29000	15	15%
29000 & above	23	23%
Total	100	100 %

Residence Area:

Area	Respondents	Percentages
Gulistan-e-Jauhar	24	24%
P.E.C.H.S	11	11%
Gulshan-e-Iqbal	26	26%
F.B Area	5	5%
Defence	11	11%
Other	23	23%
Total	100	100 %

4.3 INTERVIEW ANALYSIS:

The Interview covered the following aspects of the consumption and perceptions of consumers for processed butter and yogurt .

- ↪ Consumption of butter and yogurt.
- ↪ Most consumed brand.
- ↪ Attractive features of the most consumed brand.
- ↪ Advertising
- ↪ Availability
- ↪ Customer satisfaction.

Consumption:

Of the 20 respondents 17 people said that they only used processed butter and 3 said that they use processed yogurt and butter both and none used only processed yogurt.

RESPONSES	RESPONDENTS	PERCENTAGE
Processed Butter	17	85%
Processed Yogurt	0	0%
Both	3	14%
Total	20	100%

Most Consumed Brand:

The Interview clearly showed that the most consumed Brand is Nestle.

18 people used Nestle and only two persons had even heard of Haleeb's Butter and yogurt.

Attractive Features Of most Consumed Brand :

The most Consumed Brand is Nestle which is popular among the consumers due to the following factors.

- ↪ Affordable
- ↪ Prices
- ↪ Hygiene
- ↪ Easy to use packaging
- ↪ Brand Name’s easy recall & recognition

Advertising :

Out of 20 people 16 remembered Nestle’s advertisement which only 4 could name Haleeb’s advertisement a billboards.

RESPONSES	RESPONDENTS	PERCENTAGE
Nestle	16	80%
Haleeb	4	20%
None	0	0%
Total	20	100%

Availability :

Although Nestle’s is the most consumed brand its availability is a weakness to its brand name.

Out of 18 Nestle users 12 of them gave negative response. When they were asked about the availability of Nestle butter and yogurt.

Here it is my personal observation also that Nestle's yogurt is mostly unavailable which results in consumer switch to the other brand.

As far as Haleeb is concerned, only two respondents out of 20 are its users and they are satisfied with the availability of Haleeb butter and yogurt.

Customer Satisfaction :

Customers of both Nestle and Haleeb gave the following responses which show that over all they are satisfied with their Brand .

Out of 20 respondents 18 said they are satisfied, 2 were dissatisfied.

RESPONSES	RESPONDENTS	% age
Yes	18	90%
No	2	10%
Total	20	100%

CHAPTER 5

CLOSING UP

- 5.1 Summary of Findings**
- 5.2 Conclusion**
- 5.3 Recommendation**

5.1 FINDINGS

During the survey and presentation of this report, I observed many issues, the summary of which are as follows:

- ↳ The awareness level for Processed dairy products is very low as compared to the Open milk awareness. People still consider Open milk as the only milk that is pure and healthy and are unaware of the pathetic process of its extraction and transportation which contaminates the milk before it reaches the end user. People perceive Processed milk to be artificial and not as healthy as Pure milk.
- ↳ The most preferred brand in the three brands under research is “Nestle”. The main reasons for its preference are Hygiene, Price, Brand name & Advertisement. Nestle has efficiently covered all of these aspects and is the favorite among consumers of Processed dairy products.
- ↳ Females are the lead customers of Processed dairy products in all respects and males are the potential customers.
- ↳ People in Karachi market desire quality products and are willing to pay high prices for it. The rapid increase in the prices of Processed dairy products does not effects its users and they are satisfied to an extent that they would not switch to Open milk due to increase in the Processed milk prices.
- ↳ Except for Nestle both Haleeb and Millac have very weak Brand recall and ineffective marketing strategies.

- ↳ Open milk users are potential customers of Processed milk if the prices of Processed milk decreases. Many of the Open milk users are using it because they are satisfied with it but others are using it because they can't afford Processed milk.

- ↳ The main reasons consumers do not prefer Processed dairy products are as follows:
 1. Processed dairy products are expensive as compared to Open Dairy Products.
 2. Unawareness among the low-class and uneducated consumers about the benefits of Processed dairy milk.
 3. Due to the Pakistani culture, people have made it a tradition like habit to consume Open milk and they do not purchase Processed milk merely for this reason.

- ↳ Finally, the major finding in this survey is that the consumers have a great potential of consuming Processed dairy products provided that the producers emphasize on creating awareness and making the products always available in the market.

5.2 CONCLUSION

The conclusion of the research is that the Processed Dairy Products have a bright future scope and a great potential in the Karachi market.

Processed dairy products are being preferred mainly for the purpose of convenience of use , easy storage and hygiene. The other attractive features are Taste and Packaging. The Tetra pack makes it very convenient for the Transportation of the Processed dairy products and adds to its shelf life.

During the course of interviews it is also noted that consumers are mostly unaware of Haleeb's dairy products other than milk. There is also a lot more potential for Millac to grow but its progress seems very slow.

The analysis and the details of the report presented are based on the predetermined questionnaires. Each and every question is graded which help in analyzing, the consumers perception and consumption pattern of processed dairy products.

The sample size taken is 100 respondents selected randomly. Out of these 100 respondents 63 came out to be Processed milk users, while the rest 37 were Open milk users.

This survey research report concludes that in general people have a positive perception of Processed dairy products.

5.3 RECOMMENDATIONS

1. The main recommendation is to generate awareness of Processed dairy products on a greater scale, so that the consumers have more knowledge than they currently have
2. Haleeb and Millac should work on improving their advertising strategies to create a strong Brand recognition and recall in the minds of the consumers.
3. Millac should aim at extending its product line, by including other dairy products such as Butter and Yogurt.
4. The prices of Processed dairy products should be slightly decreased so that the prospect customers (current consumers of Open milk) may become actual customers.
5. Males should also be targeted and attracted by the producers of Processed dairy milk as they are the potential customers.

ANNEXURES

1. Questionnaire
2. Interview Questions

QUESTIONNAIRE

Please tick the appropriate boxes.

1. Are you health conscious?

Yes No Somewhat

2. Does the brand name and image effect your buying of a product ?

Yes No Somewhat

3. What need do you associate with milk?

Health Habit Taste Desire

Etc _____

4. How often do you purchase milk?

Daily

Weekly

Other (please specify) _____

5. How much does each of the following factors influence your decision of milk purchase ?

	Very influential	Somewhat influential	Not influential	
✓ Hygiene	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
✓ Price	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
✓ Brand	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
✓ Package	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
✓ Recommendation	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>
✓ Place of Purchase	<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>

6. Which type of milk do you buy frequently ?

- Processed
- Open milk

If your answer is open milk move to Q.12, if your answer is processed milk proceed to the next question.

7. Which brand of processed milk do you purchase?

- Nestle
- Haleeb
- Millac

8. Why are you using the above ticked brand ?

Hygiene Price Brand name
 Out of Habit Recommendation Advertisement

9. Rank the following brands (1st. 2nd. 3rd) :

- Nestle _____
- Haleeb _____
- Millac _____

10. Would your ranking change if the prices of the brand changes?

Yes No

11. Are you satisfied with your current brand of milk?

Yes No

If yes, why _____

If no, why _____

12. Do you feel any quality difference between Open milk and processed milk?

Yes

No

Somewhat

If yes, which is better?

- Processed
- Open milk

13. Which type of milk do you use for :

Open milk Processed milk Powdered milk

- | | | | |
|------------------|--------------------------|--------------------------|--------------------------|
| ▪ Making tea | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ▪ Drinking plain | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ▪ Cooking | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

14. If you are an Open milk user, would you prefer processed milk if its price is decreased?

Yes No

If you are a Processed milk user, would you switch to open milk if the prices of you brand increases?

Yes No

15. Which brand's advertisement do you remember most?

Nestle Haleeb Millac

16. Is your preferred milk always available in the market?

Yes No

17. If you change your brand, (or type of milk) for which of the following reasons will you switch for?

- Price
- Quality
- Hygiene
- Advertisement
- Word-of-mouth
- Taste
- Availability
- Etc _____

PERSONAL INFORMATION:

Gender :
Male Female

Age :
20 – 25 26 – 35
36 – 45 46 & above

Status :
Employed Unemployed House wife Student

Income level :
5000 – 10000
11000 – 19000
20000 – 29000
30000 and above

Residence Area :

Thank you, for sparing your time for filling this questionnaire.
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**INTERVIEW QUESTIONS:**

1. Do you use Processed Dairy products other than milk ?

Yes or No

2. Do you use butter, yogurt or both ?

3. Which brand do you use for butter ?

4. Which brand do you use for yogurt ?

5. Why do you use your preferred brand ?

6. Which brands advertisement of butter do you remember most ?

Nestle or Haleeb

7. Which brands advertisement of yogurt do you remember most ?

Nestle or Haleeb

8. Is your preferred butter always available in the market ?

Yes or No

9. Is your preferred yogurt always available in the market ?

Yes or No

10. Are you satisfied with your current brand ? Why?