

Consumer Buying Behavior Toward Protein Supplements

By

Harish Santoshi

*Dissertation submitted for the partial fulfillment of the
MBA Pharmaceutical Management*

Academic year, 2017-2019



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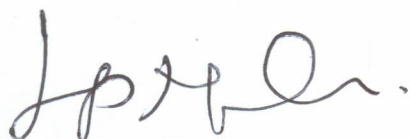
TO WHOMSOEVER MAY CONCERN

This is to certify that **Mr. Harish Santoshi** student of MBA Pharmaceutical Management from The IIHMR University, Jaipur has undergone internship training at **Raptakos Brett & Co. Ltd** from **11th Feb 2019 to 11th May 2019**.

The Candidate has successfully carried out the study assigned to him during internship training and his approach to the study has been sincere, scientific and analytical.

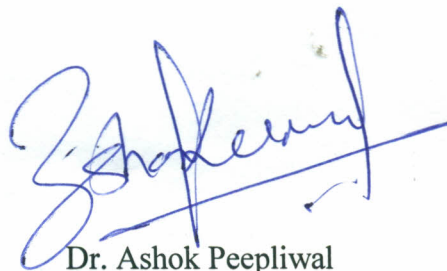
The Internship is in fulfilment of the course requirements.

I wish him all success in all his future endeavors.

A handwritten signature in blue ink, appearing to read 'Sandeep Narula'.

Dr. Sandeep Narula

Dean, School of Pharmaceutical Management
The IIHMR University, Jaipur

A handwritten signature in blue ink, appearing to read 'Ashok Peepliwal'.

Dr. Ashok Peepliwal

Associate Professor
The IIHMR University, Jaipur



Raptakos, Brett & Co. Ltd.

CORPORATE OFFICE: 21A, MITTAL TOWER, 210, NARIMAN POINT, MUMBAI - 400 021

To Whomsoever It May Concern

This is to certify that Mr Harish Santoshi student of IIHMR University (2017-19) batch has completed his dissertation with us from 11th February 2019 to 11th May 2019.

He undertook " **CONSUMER BUYING BEHAVIOUR TOWARDS PROTEIN SUPPLEMENTS**"

In Delhi North West region as his dissertation project and successfully completed the requirement of the project

He comes across as committed, sincere and diligent person who has strong drive and zeal for learning

We wish him the very best for the future endeavours

Rajesh Sharma
Rajesh Sharma

General Manager Marketing

THE IIHMR UNIVERSITY, JAIPUR

CERTIFICATE BY SCHOLAR

This is to certify that the dissertation titled **“Consumer Buying Behaviour toward Protein Supplements”** and submitted by **Harish Santoshi** Enrollment No **IIHMR-U/02/2017-19/0099** under the supervision of **Dr. Ashok Peepliwal** for award of MBA in Pharmaceutical Management of the University carried out during the period from **11th February, 2019 to 11th May 2019** embodies my original work and has not formed the basis for the award of any degree, diploma associate ship, fellowship, titles in this or any other institute or other similar institution of higher learning.

Harish Santoshi
Signature

Abstract

Objective:

1. To study how consumer buying behaviour can be affected toward protein supplements.
2. To find out the loop holes for making future marketing strategies.

Methodology:

- Primary Research Study
- Study Period: 11-Feb-2019 to 11-May-2019 (3 months)
- Sample Size: 90 Patients
- Implementation Period: 11-March-2019 to 11-May-2019 (2 months)
- Descriptive Study
- Data Analysis done using MS-Excel

Result:

- It has been study that Media and Community effect the buying behaviour of consumer toward protein supplements.
- Study shows that people get to tend change from one supplement to another (influence of media or community)
- Study show that shelf presence of protein supplements effect consumers buying behaviour.

Conclusion & Suggestion:

- New marketing strategies to be implemented in which community engagement should be prior importance to increase the brand awareness among the community members.

Acknowledgement

I humbly owe the completion of this Dissertation and Internship work to the almighty and my family whose love and blessings will be with me in every movement of my life.

I would like to extend my sincere gratitude to MR shyamal sengupta **Mr. Rajesh Sharma (Senior Marketing Manager RAPTAKOS, BRETT & CO.LTD.** for providing me an opportunity to learn and develop professionally.

I also extend my gratitude to my project guide **Dr. Ashok Peepliwal (Associate Professor, IIHMR University Jaipur)** for his valuable suggestions, support and keen interest throughout the study that helped me in completing this work. I thank him for the freedom of thought, expression and trust which was greatly bestowed upon me.

I would also like to pay my gratitude to the **Mr Atul Shukla (Area Manager)** and entire team of **DELHI NORTH WEST** who has helped me by sparing their valuable time and extended their support and guidance to help me achieve my task successfully.

Last but not the least I would like to thank my family for supporting and standing with me in successfully completing the project.

Harish Santoshi

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Organization Profile

Raptakos, Brett & Co.Ltd has been serving the medical profession globally, with a wide range of high quality healthcare products for nearly 9 Decades now.

Raptakos, Brett & Co. Ltd. was established in 1930 by two great visionaries – Mr. A.Raptakos & Mr. W.H.Brett, with the mission of serving the nutritional needs of people.

Over the past eight decades, the company has shown consistent growth and acquired a well-earned reputation for serving the medical profession and patients alike with a portfolio of innovative products.

Even today, this remains the guiding principle that propels us to innovate and excel in the field of pharmaceutical and nutraceutical formulations.

HIGHLIGHTS

- Manufacturing facilities complying WHO GMP Certifications along with other international standards are located at Thane, Roha, Karad, Chennai and Dahej. Our newest plant Dahej is a state of the art facility dedicated for the manufacturing of vital range of nutritional products. It has completely automated system of operations. We ensure stringent quality control, quality assurance and well-regulated production practices.
- The company also has a plant at Alwar for manufacturing intermediate products required in various formulations
- All the company's products have been developed through intensive in-house R & D efforts. Our Research and Development laboratories have won recognition for their work from the Department of Science and Technology, Government of India.
- Raptakos, Brett & Co. Ltd. has many firsts to its credit in terms of technology, products and innovations.
- Research is focused primarily in the areas of nutrition and dietetics, APIs, pharmaceutical dosage forms and analytical methods.
- Raptakos, Brett & Co. Ltd has been successful in developing an innovative and unique drug delivery system called the Diffusion Rate Controlling Membrane technology or DRCM technology.

- This technology enables a single dose of a drug to be made available to the body over a 24 hour period in the required therapeutic concentration. The company has several products incorporating this technology.
- Other pharmaceutical products cover several therapeutic groups such as Vitamin and Mineral supplements, Haematinics, gastrointestinals, digestive enzymes, NSAIDs and various other therapeutic categories.
- The company has a wide range of nutraceutical products ranging from specialized infant foods for low birth weight as well as term infants and for lactose intolerant infants, supplements for pregnant women and lactating mothers, growing children, geriatrics and critically ill patients.
- In the segment of Nutraceuticals – projected to grow dynamically, both internationally as well as in India – the company has established itself as a force to reckon with.
- The company has an extensive distribution network comprising 24 branches spread all over India as well as branch offices in various countries.
- Over 1000 field personnel serve the medical professionals throughout the country.
- By focusing on this area and by launching products which are well accepted, the company is poised for quantum growth in the coming year

PRODUCTS

Pharmaceuticals	Nutraceuticals
ABRIVIT – 3 DROPS	Easifud
Arbivit-3 Forte Drops	Hovite L Drops
Arbivit – 3 Syrup	Hovite L Syrup
Calcinol D Suspension	IsoFLAV CR Capsules
Calcinol Granules	IsoFLAV PLUS CR
Calcinol RB Tablets	Lactodex 1
Caroid Syrup	Lactodex 2
Caroid Tablet	Lactodex 3
Durasalyn Paed Liquid	Lactodex 4
Elixir Neogadine	Lactodex HMF
Flemnill Liquid	Lactodex LBW
Fructodex Saline	Lactodex NMW 1
Fructodex Water	Lactodex NMW 2
Hepatoglobine Capsules	New Nutrimom
Hepatoglobine Liquid	Rapgrow D Drops
Hepatoglobine Drops	Threptin Diskettes
Hepatoglobine Mikros	Threptin Diskettes (Chocolate)
Hepatoglobine XP Tablets	Threptin Micromix (Vanilla)
Igol	Threptin Lite
Igol D	Threptin Micromix (Chocolate)
IsoFLAV- V Vaginal Gel	Trophox
Lotemp Drops	Veelac First
Lotemp Suspension	Veelac Wheat
Neogadine Drops	Veelac Wheat Apple
Neogadine Mikros	Zerolac
Neogadine SG	
Neopeptine Drops	
Neopeptine Liquid	
Subsyde CR	
Zytee RB Gel	
Zytee L	

Services

Raptakos Brett Test Laboratories are engaged in providing analytical services and solutions to various industries in the area of

1 Chemical and Instrumental analysis.

2 Microbiology and Sterility testing.

Services offered

- Drugs and Cosmetics
- Foods and Beverages
- Veterinary Products
- Chemicals and Fertilizers
- Metals and Minerals
- Bulk Drugs and Elemental Analysis
- Dyes and Dye Intermediates
- Oils and Fats
- Soaps and Detergents
- Packaging Testing
- Water Testing
- Nutritional Supplements
- Bakery and Confectionery Products
- Milk and Milk Products

State of Art Instruments

- Liquid Chromatography – Spectra physics / Jasco (with UV Visible and RI Detectors)
- Gas Chromatography – Netel. (with Head Space Analyser)
- UV Visible Spectrophotometer – Shimadzu-UV-1700 (Band width less than 1 nm)
- Atomic Absorption Spectrophotometer- GBC-632B
- Infra-Red Spectrophotometer – Buck Scientific
- Dissolution Apparatus – Veego
- Potentiometric Titrator – Veego
- Karl Fischer Titrator – Veego
- Viscometer – Brookfield
- Flame Photometer

Research and Development

We do not believe quality to be an attribute but rather a culture that is firmly believed and practiced at Raptakos, Brett & Co., Ltd. This is evident in the fact that our products are registered and accepted by the Health Authorities of various countries.

With well laid out quality standards, undoubtedly higher than the minimum prescribed statutory levels, our efforts are channeled towards improving quality at par with ever-evolving standards worldwide.

Research & Development is an ongoing process at Raptakos, Brett & Co., Ltd.

This is indeed a focus area and all our products are developed internally by a team of scientists comprising of Doctorates in Pharmacy and Nutrition.

Our plans are in place to expand the scope of Pharma research, from process and New Drug Delivery System (NDDS) based formulations to even higher levels of research.

This again will be a step forward in keeping abreast with international developments.

Areas of research

- Pharmaceuticals
- Food and Technology
- Fine chemicals
- Analytical method development
- Packaging development

International operations

Raptakos Brett & Co. Ltd. has been making pioneering efforts in establishing a presence through its own field force in emerging markets and aggressively promoting brands to take leadership positions.

Inspired by the vision to be a global player and a supplier of quality nutraceutical & pharmaceutical products, Raptakos, Brett & Co. Ltd. started exports in **1990** and since then has marked its presence in more than 15 countries including Ghana, Indonesia, Israel, Kenya, Malaysia, Malawi, Malta, Mozambique, Myanmar, Philippines, Singapore, Senegal, Sri Lanka, Thailand, United Arab Emirates, Uganda, United Kindom, Vietnam and Zambia.

The Company has ongoing plans to expand its reach to other markets including CIS countries, Europe and South America.

Manufacturing

Our manufacturing units are located in Thane, Dahej, Roha, Karad and Chennai. We have large capacities to manufacture tablets, granules, capsules, syrup and creams.

A number of our specialty products are manufactured using the unique DRCM Technology that provides the advantage of “Once a day dosage convenience” and minimal side effects.

Our state of the art manufacturing facilities have been appreciated and approved globally by various regulatory authorities. We are a WHO-GMP, ISO certified company and Government recognized Export House.

INTRODUCTION

The global protein supplements market size was valued at USD 14.0 billion in 2018 and is driven by increase in health and fitness centers and rising health consciousness among consumers. Increasing popularity of these supplements among millennials and development of innovative protein-based supplement in different forms, coupled with numerous health benefits, are some of the major key factors driving the market over the forecast period.

Furthermore, positive outlook towards the sports nutrition market on account of increasing importance of active lifestyle, along with rising awareness towards protein benefits, is expected to play a crucial role in promoting the use of protein supplements products.

Factors such as hectic lifestyle, increasing population of working women, and rising adoption of western food are anticipated to boost the overall protein supplements market growth. In addition, functional advancement including muscle repair, boosting energy, and weight loss, rising usage of snack-based meal replacements, and surging consumer demand for greater ingredient traceability and authenticity are likely to augment the demand for the product over the forecast period.

Powder protein supplements are gaining traction among body builders, exercisers, and athletes. Moreover, demand for ready to drink products is increasing among consumers on account of their growing availability and ease in consumption. Online distribution channels will witness significant growth over the forecast period owing to rising internet users, easy accessibility, busy lifestyle, and availability of options. Additionally, discounts and offers on products will boost online sales in the coming years.

The online stores segment occupied 53.5% share of the overall revenue in 2018. Increasing number of internet users, ease of access, fast-paced lifestyle, 24/7 availability, convenience, and lots of options to choose from are the factors driving online sales. Moreover, discussion portals, discounts and offers on products, and various promotion strategies will fuel online sales over the forecast period.

Direct to customer (DTC) is also considered to be a major segment, which held 20.9% share of the overall revenue in 2018. DTC channel involves direct marketing aimed at the end

consumers. Companies are developing user friendly and specialized websites to market their products without the need for any third-party distribution.

The animal-based segment enjoyed 67.6% share of the overall revenue in 2018. It consists of meat and dairy proteins, which include whey, casein, egg, beef, poultry, and fish proteins. Animal-based products are complete sources owing to presence of all the essential amino acids. Milk and egg proteins are the most consumed animal-based products. In addition, presence of various nutrients including vitamin B12, Vitamin D, DHA (Docosahexaenoic acid), heme-iron, and zinc makes animal-based products the preferred source and is anticipated to fuel the growth over the forecast period.

The plant-based segment is expected to register the fastest CAGR of 7.9% over the forecast period. This can be attributed to growing popularity among consumers including vegans, vegetarians, and people who are allergic to dairy and egg proteins. Plant-based products consist of proteins derived from various sources including soy, peas, hemp, wheat, rice, quinoa, canola, cranberry, pumpkin, potato, flax, and oat, wherein soy and pea proteins were the dominant segments. However, plant-based products are not considered to be complete sources owing to lack of one or more essential amino acids. Therefore, various plant-based products are often blended together to account for all the essential nutrients.

LITERATURE REVIEW

A Study on Consumer Behaviour towards Health and Dietary Supplements in Mumbai City (Snehal Chincholkar)

There are equal number of male and female respondents and majorly are in the age group of 16-30 (71 %) years and rest are above age of 30. Among all 100 participants only 34 % are consuming any sort of dietary supplements while 60% feel the need of these supplements assuming these are good for health. At the time of buying these products influence of advertisement, reference group and family does not seems very impactful while health consultants or doctor's recommendations plays major role. All the respondents prefer natural or herbal products over chemical products and preferred forms are shakes or pills followed by powder. Most of the consumer are satisfied with the supplement's results (70%) and want to recommend to others (71%). About pricing of these products 46 % consumers feels that they are fairly priced while 54 % thinks they are overpriced. Overall it can be concluded that consumers are aware about health and dietary supplements and feels that it will be helpful for them for keeping good health.

Protein Supplements Market Size, Share & Trends Analysis Report By Product (Powder, Ready to Drink), By Application, By Raw Material, By Source, By Distribution Channel, By Region, And Segment Forecasts, 2019 – 2025

The global protein supplements market size was valued at USD 14.0 billion in 2018 and is driven by increase in health and fitness centres and rising health consciousness among consumers. Increasing popularity of these supplements among millennials and development of innovative protein-based supplement in different forms, coupled with numerous health benefits, are some of the major key factors driving the market over the forecast period.

Furthermore, positive outlook towards the sports nutrition market on account of increasing importance of active lifestyle, along with rising awareness towards protein benefits, is expected to play a crucial role in promoting the use of protein supplements products.

Factors such as hectic lifestyle, increasing population of working women, and rising adoption of western food are anticipated to boost the overall protein supplements market growth. In addition, functional advancement including muscle repair, boosting energy, and weight loss, rising usage of snack-based meal replacements, and surging consumer demand for greater

ingredient traceability and authenticity are likely to augment the demand for the product over the forecast period.

Protein Ingredients Market worth \$70.7 billion by 2025 (MARKET AND MARKETS)

The report "Protein Ingredients Market by Source (animal [dairy, egg, gelatin] and plant [soy, wheat, vegetable]), Form (dry and liquid), Application (food & beverages, feed, pharmaceuticals, and cosmetics & personal care products), Region – Global forecast to 2025" The protein ingredients market is projected to grow from USD 49.8 billion in 2019 to USD 70.7 billion by 2025, at a compound annual growth rate (CAGR) of 6.0% during the forecast period. The major factors driving the protein ingredients market include the increase in demand and consumption of functional food & beverages, growing consumer awareness about healthy diets among people, and increasing demand for protein as a nutrition and functional ingredients.

Pharmaceutical is projected to be the fastest-growing application of protein ingredients during the forecast period.

The protein ingredients market has been segmented, on the basis of application, into food & beverage, cosmetics & personal care products, feed, and pharmaceuticals. Pharmaceutical is projected to be the fastest-growing application in protein ingredients market during the forecast period. This is attributed to the increase in aging population and their need for improved metabolism and health products as proteins are essential amino acids that help the human body boost its immunity and help build and repair tissues. They are the building blocks for bones, muscles, cartilage, skin, and blood. Thus, protein form an important component in the pharmaceutical and healthcare industries.

The animal source is projected to account for the largest market share during the forecast period.

The protein ingredients market has been segmented, on the basis of source, into animal and plant source. The animal source is projected to be the largest segment in the protein ingredients market. This is attributed to the diverse flavor profile and nutrition-rich attribute as compared to the plant-based protein. Further, their rising demand for applications in sports nutrition, infant nutrition, and geriatric nutrition, influenced by lifestyle and demographic shifts, is a key market driver.

Asia Pacific is projected to be the fastest-growing region during the forecast period.

Asia Pacific is projected to be the fastest-growing region during the forecast period. The market in the region is driven by increase in population growth especially in countries such as China and India. Further, rise in demand for healthy food products having high nutritional value such as soy, wheat, and vegetable protein is driving the market in this region.

Major vendors in the protein ingredients market include Cargill (US), ADM (US), DowDuPont (US), Kerry Group (Ireland), Omega Protein Corporation (US), Friesland (Netherlands), Fonterra (New Zealand), Arla Foods (Denmark), AMCO (US), Roquette (France), Gelita AG (Germany), Kewpie Corporation (Japan), AGARNA (Austria), AMCO Proteins (US), Hilmar Ingredients (US), Axiom Foods (US), and Burcon Nutrascience (Canada).

Study Objective

This is a primary research study conducted in Delhi North West to study the consumer buying behaviour toward protein supplements.

1. To study how consumer buying behaviour can be affected toward protein supplements.
2. To find out the loop holes for making future marketing strategies.

Research Methodology

Study Design: Primary Research Study

Sampling Method: Non Probability Convenience Sampling

Sample Population: Community Members

Sample Size: 90

Sample Area: Delhi North West

Time Period: 11th February to 11th May 2019

Data Analysis: Data analysis was done using MS-Excel and interpreted

Analysis

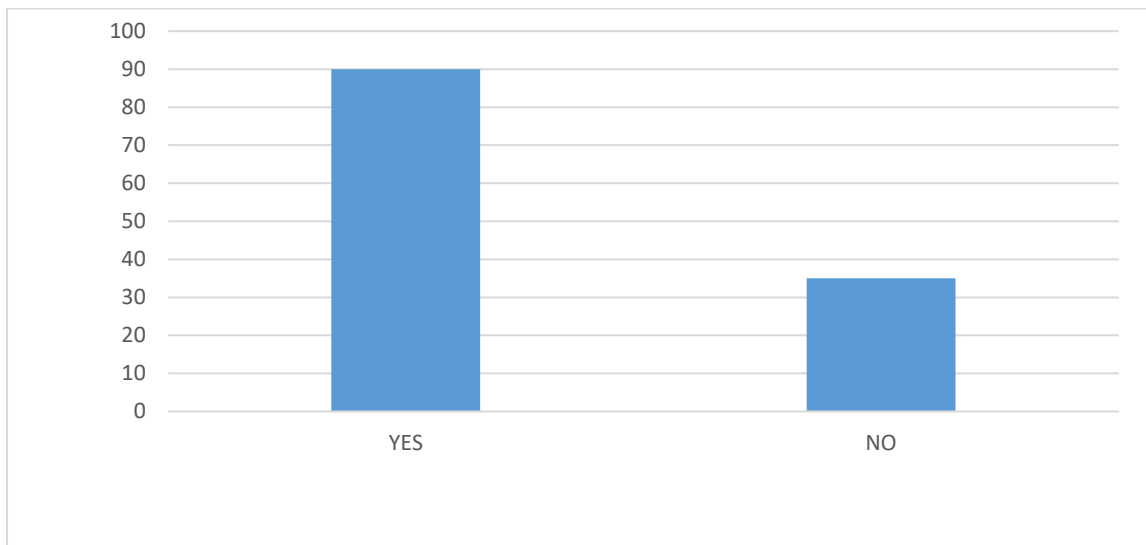


Fig-1 Used Any Protein Supplement

- In this above figure question was among the 145 individuals that have they ever used any protein supplements. And from this study has got its 90 individuals who are going to participate in this study
- Higher proportion of protein supplement usage among the people show that people are aware about the protein supplements and they are using it for their healthy life style.

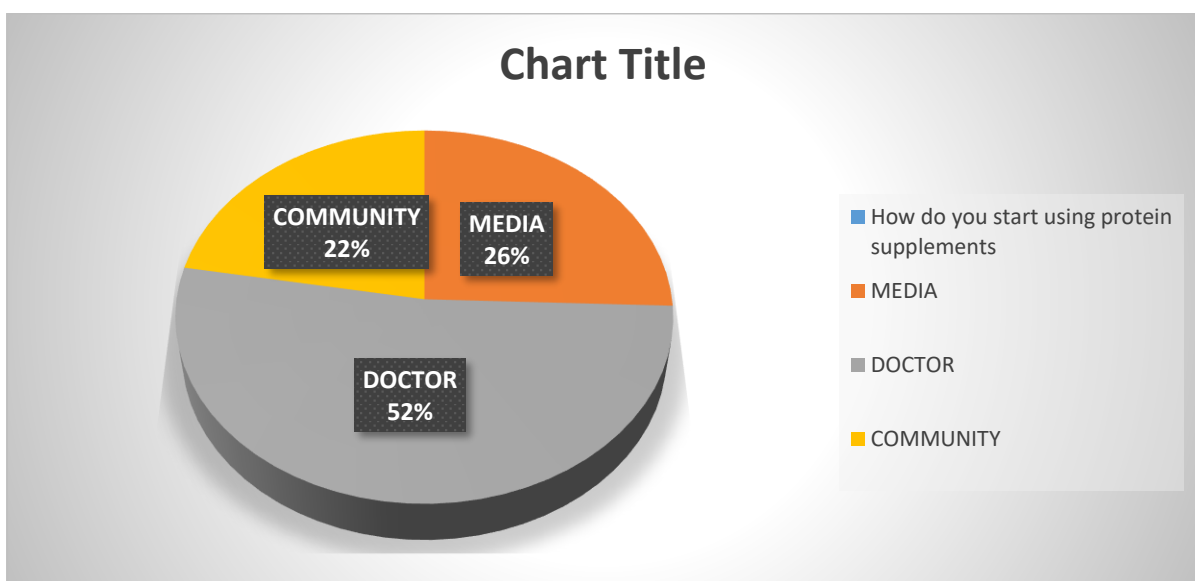


Fig-2 How they started using protein supplements

- In the above fig-2 it is clearly indicated that around 52% (47) individuals has started by doctor's recommendation and so major influencer is doctor in this case.
- Around 26% (23) are influenced by media and 22% (20) are influenced by community members.
- From the fig-2 it is indicated that around 48% (43) individuals are influenced other than by doctor. This show media and community members are influencing the buying behaviour of consumer.

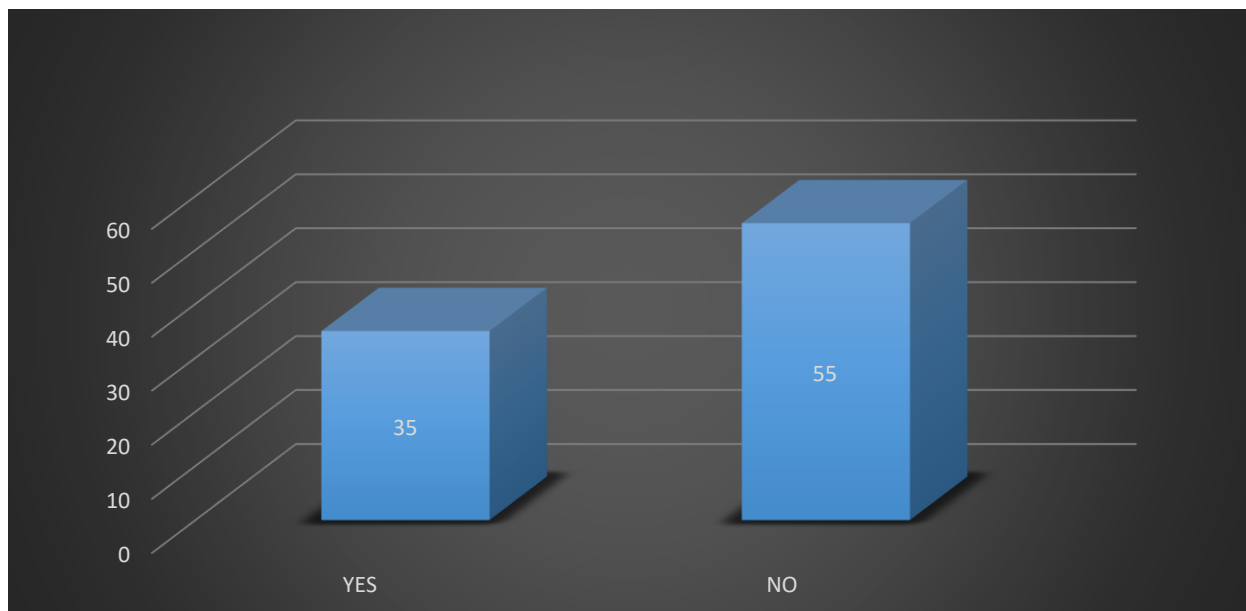


Fig-3 Shifted from one protein supplement to another protein supplement

- From fig-3 it is indicated that around 35 individuals have shifted from one supplement to another by the external reference.
- This fig shows that media and community play major role in buying behaviour of individual.

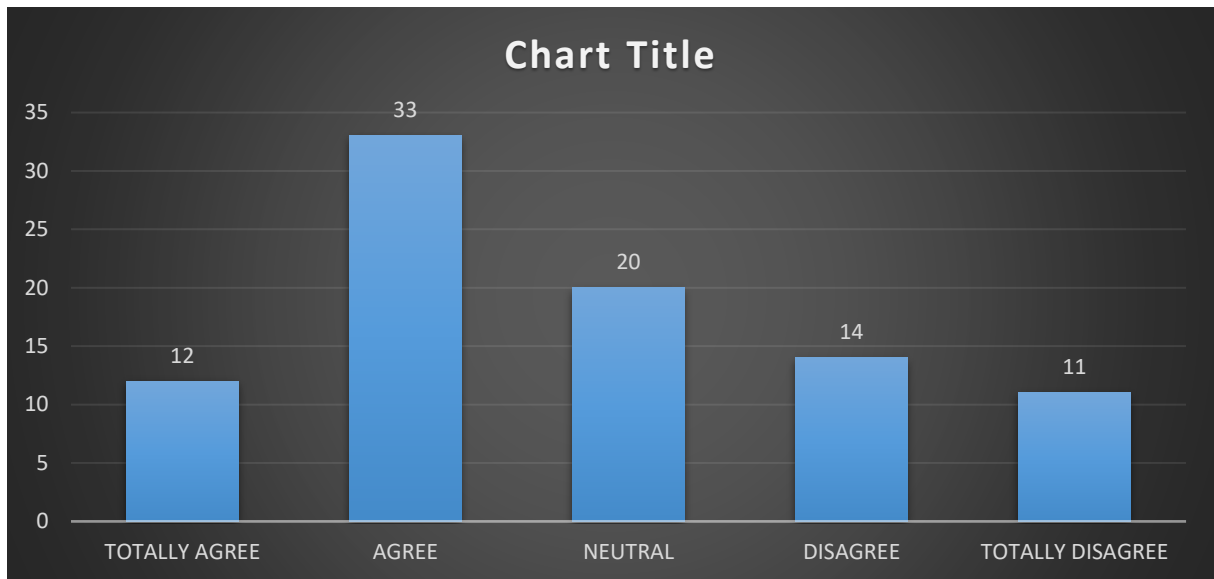


Fig-4 Shelf presence of protein supplement's effect the buying behaviour.

- In the above fig-4 it is seen that around 45 individuals out of which 33 are agree and 12 are strongly agree that shelf presence of protein supplements in mall and sops effect their consuming behaviour.
- From this it can studied that buying behaviour of individuals are effected by companies who are showing more push strategies in marketing.

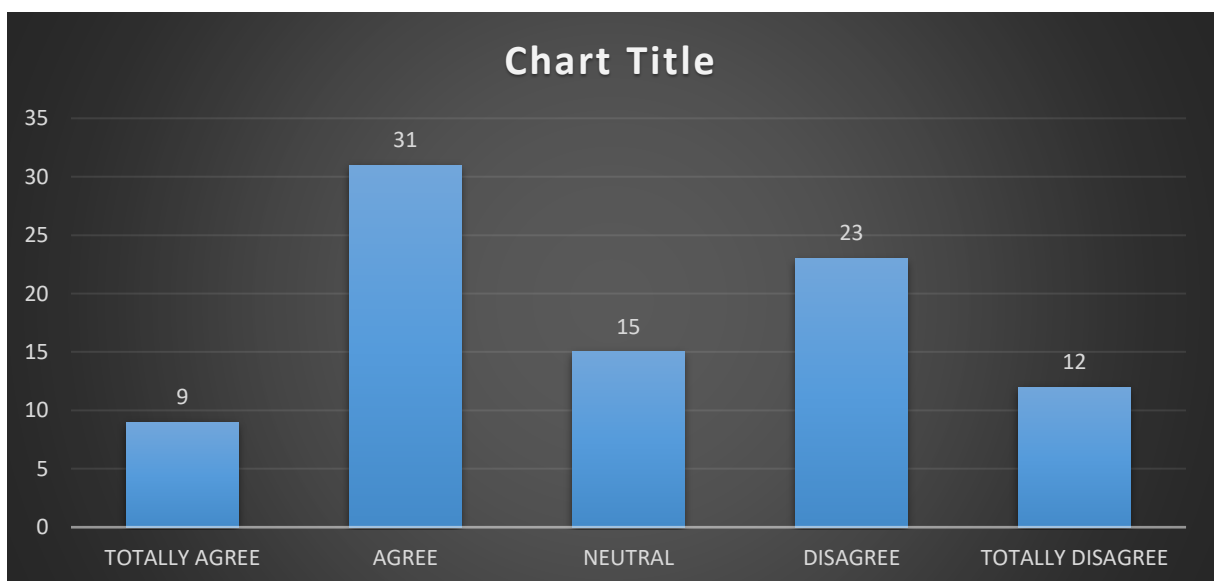


Fig-5 Educational Programmes effect your Buying behaviour

- In the above fig-5 it is clearly indicated that around 40 individuals have agreed that educational programs and advisory campaigns done by pharmaceutical companies effect their prescribing behaviour.
- This show that companies which are more toward about community engagement are holding the major business in protein supplements.
- Pharmaceutical are companies using community engagement for holding the more market share in protein supplements.

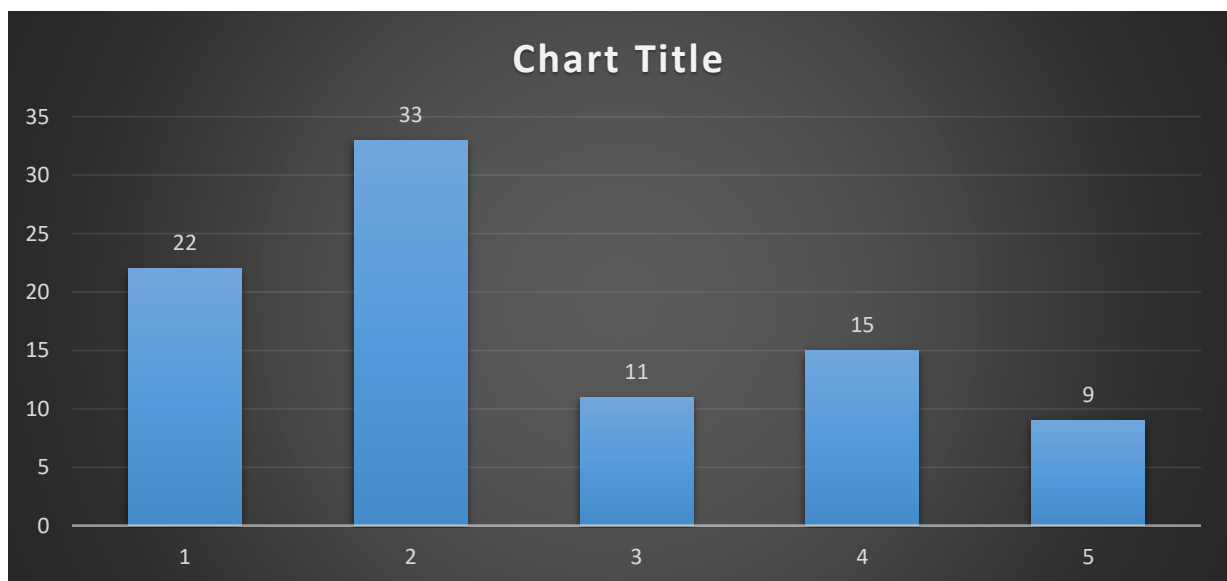


Fig-6 Educational programs help in increasing your knowledge

- Out of 90 individuals 55 have agreed that educational programs done by pharmaceutical companies help in increasing their knowledge toward protein supplements

- Thus pharmaceutical companies are engaging with community members through which companies are increasing their brand recall among the community member.

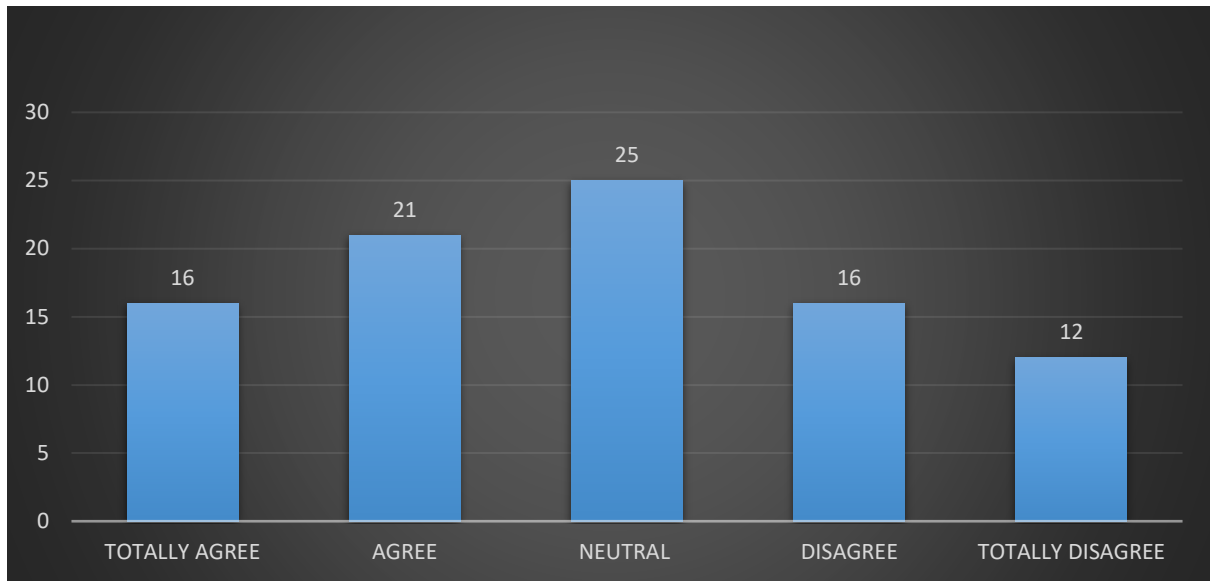


Fig-7 community members or family members effect your prescribing behaviour.

- From the above fig it is indicated that around 37 individuals have agreed that community members and family members have effected their buying behaviour towards protein supplements
- thus community play a major role on individuals buying bahaviour towrd protein supplements

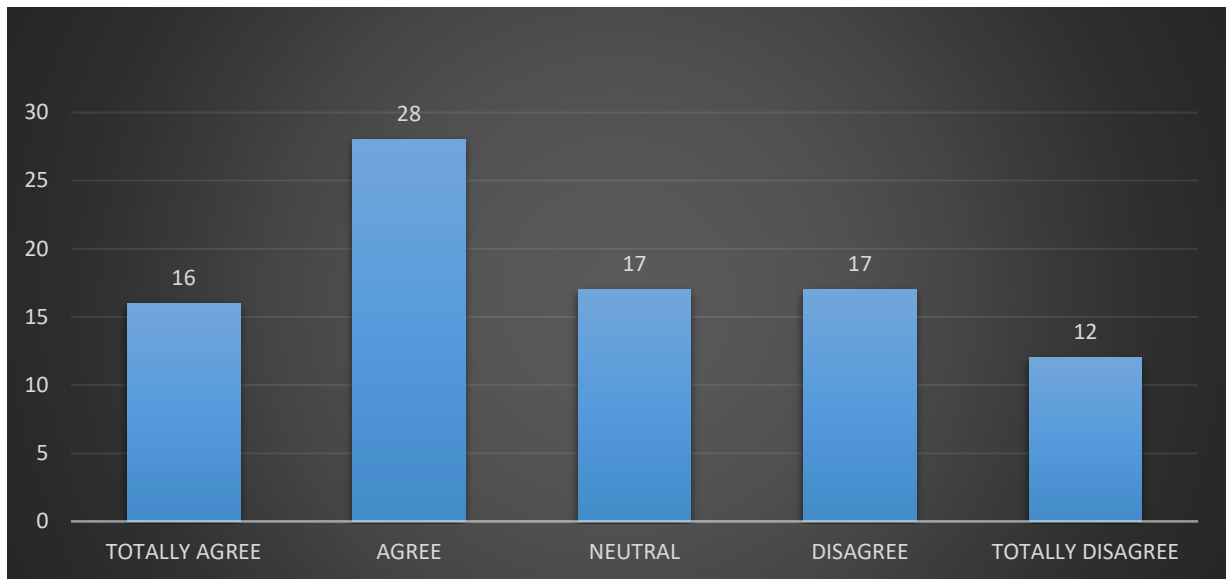


Fig-8 Effect of media on consumer buying behaviour

- From the above fig it can be seen that around 44 individuals have agreed that digital and print media effect their buying behaviour of protein supplements.
- Thus the companies which are using digital and print media for communication among community members are holding the major market share among the protein supplements

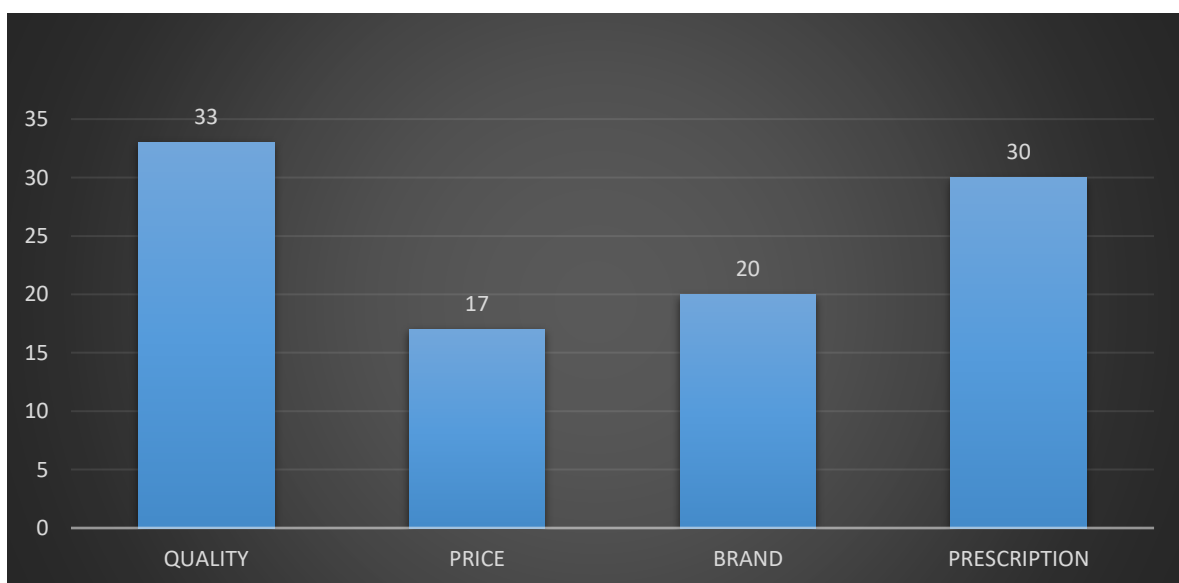


Fig-9 values most while buying protein supplement

- From the above fig it can seen when it comes to buying any protein supplement 33 individuals have preferred quality, 17 (price), 20 (brand), 30 (prescription).
- Quality and Prescription plays a major role in consumer buying behaviour.
- Brand and Price are secondary in case of buying the protein supplement.

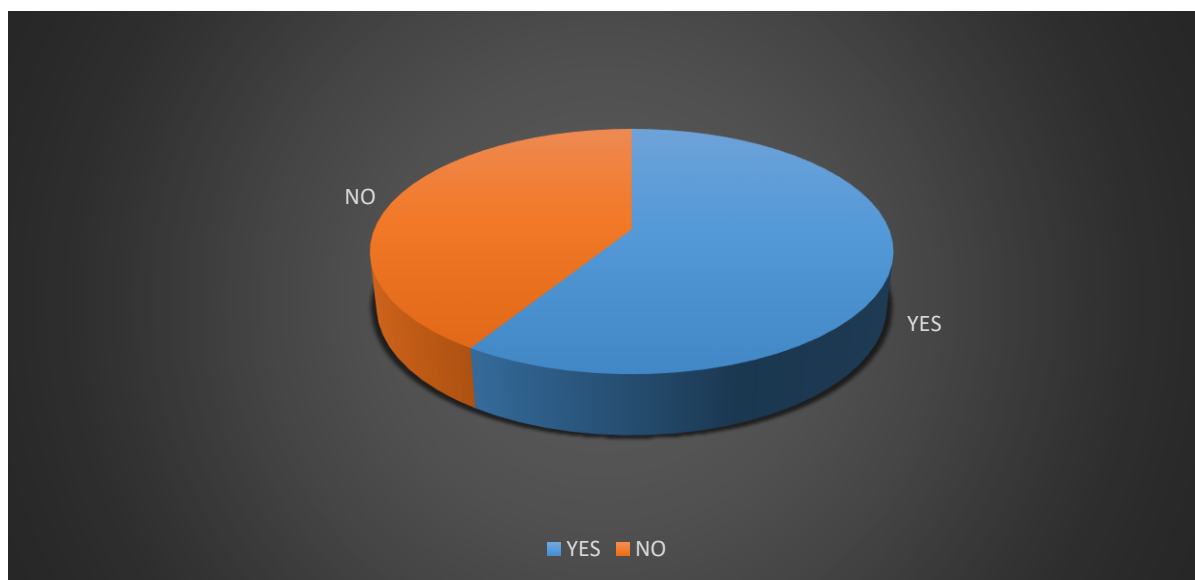


Fig-10 recommendation to others about protein supplements

- Around 59% (53) have answered that they recommend protein supplements to others
- This show that indirectly community members have the influence over the new individual buyer.

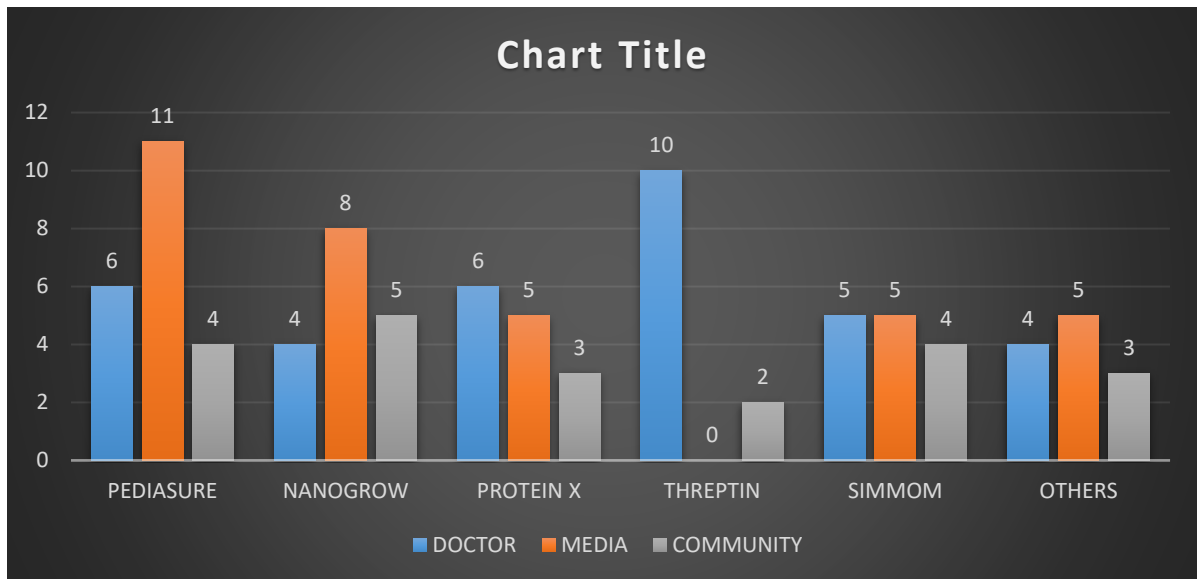


Fig-11 How they come to know about brand

- From the above figure it can be seen Pediasure (11) is the brand which individual mostly come to know through media and then comes Nanogrow (8).
- Fig also indicate that threptin is one of that brand which is mostly prescribed by doctor (10) but there is poor media engagement (0) and community engagement (2) among the community.

Conclusions

As per the study indicates consumer buying behaviour is affected by external factors. Media and community other than doctor are also the important stake holders which influence the consumer buying behaviour.

As study indicates there are 48% individual in the studies which have started using protein supplement through Media and Community.

It has been seen in the studies that around 35 people out of 90 had shifted from one protein to another protein supplement and community and media plays a major role in this behaviour of individual

From the studies it can be seen that educational and advisory campaigns done by pharmaceutical companies effect the buying behaviour of consumer toward protein supplement.

Doctor also play very important role in consumer buying behaviour.

From the overall study it can be concluded all the factors play important role in consumer buying behaviour. And major pharmaceutical companies are influencing the community members through digital media.

Recommendations

Engagement of community members-

Companies should increase their engagement with community members through educational programs or advisory campaigns where community members can come to know about the disease as well as best suitable cure. In this way companies can hold the community and influence its buying behaviour.

Digital and Print media-

Today digital and print media is playing a very important role in influencing the buying behaviour of consumer.

Digital and Print media presence to be increased for holding future profit.

Annexure
Questioner for community members

Have you ever used any Protein Supplements?

Yes

No

How do you became aware about Protein Supplements?

Prescribed By Doctor

Media (TV, Newspaper, Magazines etc.)

Referred or Influenced by community members or relatives

Do you think the shelf presence of Protein Supplements in stores or malls influence your buying behaviour?

Totally Agree

Agree

Neutral

Disagree

Totally Disagree

Do you think educational health programmes done by pharmaceutical companies effect your buying behaviour toward protein supplements?

Totally Agree

Agree

Neutral

Disagree

Totally Disagree

Do you think the Educational Health Programmes or Patient Advisory Campaigns done by different pharmaceutical companies helped in increasing your knowledge toward protein supplements?

Totally Agree

Agree

Neutral

Disagree

Totally disagree

Do you think recommendation made by family members or community members influence your buying behaviour toward protein supplement?

Totally agree

Agree

Neutral

Disagree

Totally Disagree

Do you think companies doing endorsements of proteins supplements on the digital and print media influence your buying behaviour?

Totally agree

Agree

Neutral

Disagree
Totally Disagree

What matters most while you are buying the protein supplement?

Quality
Price
Brand
Prescription

Have you ever shifted from one Protein Supplement to another Protein Supplement? why

Yes
No

Do you recommend Protein Supplements to others which you use? *

Yes
No

Can you recall any protein supplement which you have used recently? And how do you come to know about this product?

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