

**“Examining the demand of Pet Food and
Factors Influencing Pet Owner’s Purchasing Decision”**

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DECLARATION BY THE STUDENT

I hereby declare that this dissertation titled “**EXAMINING THE DEMAND OF PET FOOD AND FACTORS INFLUENCING PET OWNER’S PURCHASING DECISION**” is the Bonafede record of my original research work. I declare that it has not been submitted to any other university or institution for the award of any degree or diploma. Information derived from the published or unpublished work of others has been duly acknowledged in this text.

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This is to certify that dissertation titled **“EXAMINING THE DEMAND OF PET FOOD AND FACTORS INFLUENCING PET OWNER’S PURCHASING DECISION”** is a record of the research work undertaken by **Arka Prabha Pal** in partial fulfilment of the requirements for the award of the degree of MBA – Pharmaceutical Management from the IIHMR University, Jaipur under my guidance and supervision and his approach to the research study has been sincere, scientific, and analytical.

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ABSTRACT

This study analyses consumer behaviour when purchasing pet food, including brand loyalty, price perception, and ingredient preferences. A diverse sample group will be randomly selected to gather exploratory and descriptive data on key factors influencing the target audience. The results show an increasing population of pets with a preference for cats in Indian households due to changing living arrangements. More than half of pet owners prefer buying their pets' food online because of its convenience while prioritizing high-quality ingredients for nutritional value over affordability or convenience alone. Packaging plays an important role in decision-making along with health conditions recommended by veterinarians that reinforce the importance of quality ingredients sourced sustainably within a competitive market environment.

Keywords: Consumer behaviour, Pet food, Brand loyalty, Price perception, Ingredient preferences

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LIST OF ABBREVIATIONS

- 1. CAGR: Compound annual growth rate**
- 2. YOY: Year on Year Growth**
- 3. US: United State**
- 4. AAFCO: Association Of American Feed Control Officials**

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CHAPTER 1

1 INTRODUCTION

The population of precious pets in India has been growing steadily in recent times. In 2014, there were an estimated 12.58 million precious tykes in India. By 2018, this number had grown to 19.41 million. And by 2023, it's projected to reach 31.41 million. This growth is being driven by a number of factors, including rising inflows, adding urbanization, and changing cultures. [1,2]

Rising inflows are allowing further Indians to go the cost of retaining a pet canine. Urbanization is also playing a part, as people living in metropolises are more likely to have pets than those living in pastoral areas. And changing cultures are also contributing to the trend, as further Indians are looking for fellowship and emotional support from their caning companion. The growth in the pet canine population in India is having a positive impact on the frugality. The pet care assiduity is growing fleetly, and it is estimated to be worth over \$1 billion.[2]

The significance of pet nutrition cannot be exaggerated. Pet possessors are decreasingly feting the vital part that nutrition plays in maintaining their caning companion overall health and vitality. With an added emphasis on holistic pet care, consumers are seeking pet food options that give a balanced and nutritional diet. Factors similar as the presence of essential nutrients, applicable portion sizes, and specialized formulas for specific health conditions or life stages are crucial considerations when copying pet food. likewise, the rising mindfulness of pet food- related health issues, similar as rotundity and disinclinations, has urged pet possessors to check component lists and conclude for products that align with their caning companion salutary conditions. [3,4]

When it comes to choosing pet food, brand character plays a significant part. With so numerous brands available in the request, consumers calculate brand character as an index of quality and trust ability. Established brands that have been around for a long time generally have a proven track record of constantly delivering high- quality products. Positive word- of- mouth recommendations and online reviews are also essential factors that contribute to the overall perception of a brand's responsibility. For instance, some popular pet food companies like Hill's Science Diet or Royal Canin boast about their commitment to animal welfare by using premium ingredients sourced from trusted

suppliers who meet strict quality control standards set forth by regulatory bodies like AAFCO (Association Of American Feed Control Officials). [5,6]

The pet food industry is passing a significant shift in consumer preferences, with an adding focus on the constituents used in pet food formulations. Consumers are checking component markers further than ever ahead and seeking products that contain natural and recognizable constituents. This trend towards clean- markers is driven by the growing demand for high- quality pet foods that mimic human- grade norms. Both quality and cost are important aspects to consider when buying pet food to assist price-conscious pet owners make informed shopping selections. While it is critical that pets obtain appropriate nutrition, financial restrictions can frequently influence decision-making. As a result, owners tend to evaluate costs across brands and product lines in order to get the best value without neglecting their dogs' nutritional needs. Manufacturers and merchants that run loyalty programs, promotions, or discounts have a big impact on what consumers decide to buy. Customers may test out new items before committing money, for instance, thanks to manufacturers that provide free product samples, which boosts their confidence before making a purchase. Due to technological improvements and shifting customer tastes, the environment for buying pet food has experienced major changes recently. Convenience and accessibility have played a critical part in the growth of e-commerce platforms for pet food purchase. [5,6]

Technology's development has completely changed how people purchase pet food. Consumers may now easily investigate a range of products, evaluate pricing, read user reviews, and make informed selections from the comfort of their homes thanks to e-commerce websites. According to data, pet food sales on e-commerce have been increasing quickly in India lately. Only 13.3% of in 2016 were made online. However, this percentage increased to 36% by 2022. And by 2025, it's anticipated to reach 45.7%. [7]

Through this study, we will collect information on several angles of consumer behavior connected to buying pet food, similar as brand fidelity, price perceptivity, component choice, etc., allowing us to conduct a thorough analysis of request trends. For case, a recent bean by Statista (2021) set up that 39% of canine possessors place a high precedence on high- quality constituents when opting for canine food, whereas just 12% place a high precedence on pricing. By understanding these insights from our research findings, companies can gain competitive advantage over others who do not have this information at hand thus increasing revenue generation potential.

1.1 OBJECTIVES

- Determine the primary factors that affect pet owners' food purchases.
- Calculate the demand for various kinds of pet food.
- Find out which ingredients and nutrients pet owners like in their diet.
- Compare the choices made by pet owners when buying various breeds of animals (such dogs and cats).

CHAPTER 2

2 REVIEW OF LITERATURE

- **Banton et al., 2021** investigates the factors influencing dog owners' choices regarding grain-free dry dog food. The study aimed to identify the variables that predict dog owners' preference for grain-free food in North America (Canada and the United States) and Europe (France, the United Kingdom, and Germany). The survey collected 3,298 responses distributed equally among the surveyed countries. Findings showed that factors such as gender, country of residence, importance of ingredients, dietary routines, information sources, and specific claims influenced the selection of grain-free options. Understanding these decision-making processes can be valuable for assessing the impact of grain-free dog foods on canine health and well-being.[8]
- **Schleicher et al., 2019** aimed to identify the factors influencing pet food purchasing decisions. A survey was conducted with 2,181 pet owners (1,209 dog owners and 972 cat owners), including 26% animal professionals. Key factors affecting pet food choices were health and nutrition, quality, ingredients, and freshness. Veterinary healthcare professionals were the primary and most important source of nutrition information for pet owners, followed by the Internet. Pet owners prioritized buying healthy food for their pets, sometimes even more than for themselves. The study highlights the challenges pet owners face in determining the best diet for their pets.[9]
- **Dodd et al., 2019** examined pet owners' attitudes and feeding practices regarding plant-based (vegan) diets for their pets. The questionnaire-based survey collected data from 3,673 English-speaking pet owners. Results showed that a advanced proportion of pet possessors linked as submissive (6.2) or vegan (5.8) compared to the general population. Among the surveyed pet possessors, only insectivores (1.6) fed their faves factory- grounded diets, with one exception of a submissive canine proprietor. numerous pet possessors who were interested in feeding factory- grounded diets expressed a desire for further information on the nutritive acceptability of similar diets. The most common concern for meat- grounded pet foods was the weal of ranch creatures, while the primary concern for factory- grounded pet foods was the nutritive absoluteness of the diet. Among insectivores, factors impacting their decision to feed factory- grounded diets to their faves included cost enterprises and a lack of concern regarding the "unnaturalness" of similar diets. The study highlights the need for

farther exploration on factory- grounded nutrition for domestic tykes and pussycats, considering the preferences and enterprises of pet possessors who avoid beast products.[10]

- **Simonsen et al. 2014** conducted a study to determine the dog food preferences of 661 dog owners in the United States. The focus was on natural and organic ingredients, with a discrete choice experiment utilized as research methodology. Findings showed that respondents generally preferred natural ingredient-based products over conventional or organic ones but were mainly influenced by price when making purchasing decisions. They found the source of ingredients more crucial than package size, product recommendation or formula among those studied. A combination of factors such as a 5-pound package made from all-natural sources recommended for specific ages/sizes ultimately yielded highest satisfaction ratings amongst participants surveyed who are veterinary professionals specialized in this field. [11]
- **Holland (2019)** examines how the decision-making process of potential dog owners affects canine welfare. It stresses the importance of stakeholders, particularly in canine welfare, to recognize and respond to shifts in prospective owner behavior. The review consolidates information from academic researchers and animal charities to identify factors that shape acquisition choices like a dog's physical traits, behavior, health status; social influences such as breed popularity trends; demographics and socioeconomic background; past ownership experience. Complex interactions are at play when it comes to influencing prospective owners' motives/actions as indicated by research findings.[12]
- **Morelli et al. (2021)** conducted an online survey among 1545 dog owners and 676 cat owners to understand their pet food storage habits. The survey revealed that pet and owner age influenced the type of diet chosen. Most kibble feeders bought one or two packages at a time, and pets took about four weeks to consume an entire bag. Approximately 43.5% of owners used containers, mostly plastic bins, to store pet food. The kitchen was the preferred storage location, with food not exposed to direct light. However, some kibble feeders mentioned possible exposure to high temperatures. Many commercial pet food feeders consider preservatives a potential health risk. Among homemade diet feeders, 38.6% stored fish oil at room temperature. The study suggests educating pet owners on proper food storage and providing comprehensive information on additives in pet food.[13]
- **Delime et al. (2020)** conducted a study to investigate the relationship between pet food odors and the emotions of pet owners in different cultures. Participants,

consisting of dog and cat owners from France, the USA, and La Réunion Island evaluated flavored kibbles with varying chicken flavors and dosages. Results showed that modifying flavor type affected odor perception and intensity as well as emotional responses beyond relish such as activation or deactivation feelings. Regional differences influenced odor preference among American pet owners who rated it lower than their counterparts did. The study emphasizes on providing insights for manufacturers striving to enhance brand image by improving the overall experience of pets' feeding time.[14]

- **Donfrancesco et al., 2014** conducted a study that analyzed consumer acceptance of various dry dog food options, identified clusters based on liking, and determined key factors that influenced preference. Pet owners in the US evaluated eight different samples based on overall satisfaction as well as aroma and appearance preferences. They also predicted purchase intent, their pet's preference, and cost expectations. The results indicated a greater influence of color than scent on overall liking for the products tested. The clusters were not correlated with demographic information such as age or income indicating individual consumer acceptance is more significant. [15]
- **Tobie et al., 2015** discusses the importance of assessing food preferences in dogs and cats, as it is crucial to ensure that pet foods are not only nutritious but also appealing to both the animals and their owners. The pet food market is continuously evolving, necessitating ongoing evaluation of new products for their adaptability and effectiveness. Palatability, which refers to the characteristics of foods that entice animals to consume them, is a key factor to consider. The study highlights various methods for assessing food preferences in pets, depending on the type of information required. Classical techniques such as the one-bowl and two-bowl tests are commonly used. However, additional approaches such as operant conditioning (a complementary technique) and exploratory behavior analysis (a novel technique) are also available to gather more comprehensive information on the evaluation of pet food palatability.[16]
- **Becques et al. 2014** in their study examined the palatability of two cat diets (Very Palatable Kibbles and Low Palatable Kibbles) using behavioral analysis. The 17 cats participating were observed through video recordings while consuming each diet during separate, two-day sessions. Data on food quantity, consumption speed, latency to eat, and other behaviors were collected. Results showed that the Very Palatable Kibbles were preferred by cats over the Low Palatable version based on increased consumption rates and decreased sniffing times in initial stages of feeding. However,

kibble palatability did not significantly affect eating behavior beyond these factors.
.[17]

- **Pires et al. (2020)** conduct a systematic review of food preference test protocols in cats and assess the effects of test duration, time of day, and sex on the results. The review found variations in the number of days, sample size, feeding times, and number of meals per day among the included manuscripts. Additionally, the researchers conducted three palatability tests lasting 10 days each with 40 cats to further assess the effects of test duration, time of day, and gender on the results. From the second day of the test, the sensitivity of the findings rose. There were no statistically significant changes in outcomes based on time of day or gender. The study recommends considering sample size and test duration as critical factors when designing food preference tests in cats and suggests the use of power analysis for determining sample size and analyzing results.[18]
- **Xiao et al. (2021)** examines Chinese consumers' preferences and purchasing behavior for online pet food. With 220 valid samples from pet owners with online shopping experience in 2019, the research reveals that younger, urban, higher-educated, and married consumers with families tend to prefer online channels for pet food purchases. Key factors influencing their choices include brand, ingredients, and retailer reputation, while imported products are of lesser concern. Interestingly, the study finds minimal differences between consumers' online and offline shopping perspectives. The findings offer valuable quantitative insights into consumer behavior, highlight recent trends, and provide industry guidance for future demand development.[19]
- **Xu (2023)** explores how Royal Canin can attract and increase sales among Chinese consumers in the competitive pet food industry. The study utilizes the Marketing Mix Theory and SWOT analysis to examine the relationship between price, place, product, promotion, and purchase intention. It identifies the strengths, weaknesses, and market challenges faced by Royal Canin. The analysis indicates that meeting consumer needs through product features and offering multiple sales channels can enhance purchase intention, while pricing strategies exceeding expectations and limited promotion may decrease it. The paper recommends that Royal Canin expands its market share and enhances brand appeal by developing high-quality, cost-effective products and implementing effective media campaigns.[20]
- **Kwak and Cha (2021)** Amidst the global pandemic, a comprehensive study was undertaken to examine the factors that sway pet food purchases in South Korea. A

theoretical model encompassing selection attributes, recommendation and attitude, and purchase intention formed the basis of this inquiry. The survey involved 450 participants who furnished vital insights for data analysis. The results revealed that four critical aspects had a remarkable influence on pet owners' purchasing predisposition - package design, price fairness, brand reputation and product healthiness perception. These influencers engendered positive attitudes towards buying animal nutrition products while further impacting their intentions differently across online versus offline channels. This investigation's findings shed light on crucial determinants underpinning consumer behavior concerning pet food acquisition during an unprecedented crisis period.[21]

- **Rombach and Dean (2021)** conduct a study to study delved into the fascinating realm of pet food preferences, exploring how pet owners weigh convenience, natural ingredients and health claims when selecting products for their furry friends. Through a comprehensive survey with 206 participants across the United States, researchers employed an innovative structural equation modeling approach to analyze participant responses. The findings revealed that subjective knowledge bears tremendous influence over consumer priorities while objective knowledge also plays a critical role in shaping decisions regarding pet nourishment. Interestingly enough, heightened levels of involvement in purchasing processes were found to positively impact both types of cognitive understanding about these dietary choices. Furthermore - perhaps surprisingly socio-demographic factors had little predictive power towards mitigating attribute preferences among this cohort's set of priorities.[22]
- **Kumcu and Woolverton (2015)** in their study delves into the rising demand for premium pet food in the US, a sector that contributes to an \$18 billion market. Through a Heckman two-stage decision model, it analyzes how people's preferences for food affect their choices when buying pet food. The study reveals that individuals with higher incomes and education tend to purchase high-end human-grade products and are more likely to buy expensive dog/cat feed as well. Interestingly, younger consumers also exhibit this trend despite limited budgets. These findings hold significant implications for the marketing strategies of pet-food brands and highlight growing awareness among customers regarding ingredient quality and safety protocols within this industry.[23]

CHAPTER 3

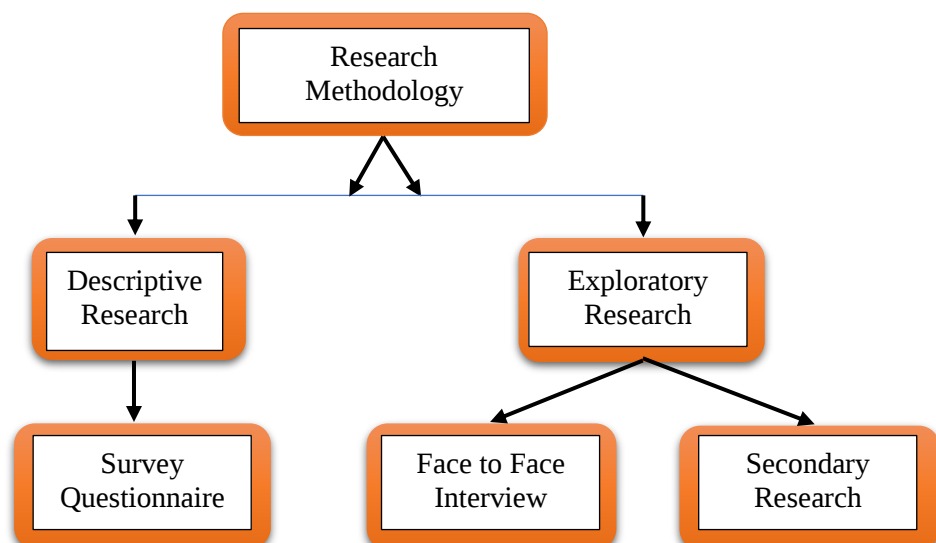
3 METHODOLOGY

3.1 Research methodology:

Gaining a thorough grasp of current market trends and customer preferences in relation to the provided product is the major goal of this study of survey data. The objective of this study is to locate any gaps or areas for growth within the demography that is being studied.

To conduct this survey questionnaire, we will involve a sample group consisting of individuals from various age groups, demographics, and geographical locations. The participants will be selected through random selection with on ensuring representation across all relevant categories.

Both exploratory and descriptive research methods were chosen because they complement each other in providing an overall picture that is both detailed and broad-based. Exploratory research enables us to obtain preliminary information about key factors affecting our target audience while descriptive research provides specific quantitative data that allows us to draw precise conclusions based on statistical analyses. Together these two approaches ensure that we have sufficient insight into what motivates consumers' behaviour towards our product offering as well as any underlying patterns or trends influencing their decision-making process.



3.1.1 Exploratory research

Exploratory research is particularly important because it can help identify key issues that may influence the results of subsequent quantitative studies. By reducing bias upfront through this initial stage of data collection and analysis, I am able to generate more useful insights for industry professionals and researchers alike.

To better understand India's pet food market, I conducted exploratory research using secondary sources and in-depth interviews. This approach allowed us to gather valuable information on consumer behaviour when purchasing pet food, attitudes towards organic ingredients, brand preferences, and other aspects of the market.

The **secondary research** conducted included exploring various aspects of the pet food industry such as:

- Industry trends
- Consumer perception towards dog food
- Attitudes and purchasing behaviour in buying dog foods.
- General information on pet foods

In order to acquire relevant insights for this study I have primarily used two types of sources namely,[24]

1. Published Academic Journals/Literature documenting diverse views around Customer perception/attitude /behaviour regarding their pets; and
2. Statistical Data obtained via Publish documents & Euromonitor international reports which provide us useful inputs relating to Indian Customers owning pets such as dog ownership figures, spendings made by them over time period etc.

In-depth interviews were done to explore the links between demographics, psychographics, and customer behaviour, variables influencing the purchase decision, and perceptions about pet food after generating the main questions from secondary research. The in-depth interview gave the interviewer the chance to go further in order to comprehend the thinking behind consumers' choices. The outcomes of the in-depth interview were anticipated to generate consumer profile, perception, and attitude hypotheses for further testing in the descriptive study.

3.1.2 Descriptive research

The goal of this descriptive research was to collect information using a self-administered survey questionnaire so that it could be analysed and statistically concluded. The goal of the research is to collect data on a certain subject from participants in order to do analysis on it.

The survey questionnaire aimed at obtaining descriptive data that could be statistically analysed, providing valuable insights into the research question. Participants were asked questions related to their experiences and opinions regarding the subject matter being studied.

3.2 Sampling plan:

Convenience sampling, a non-probability approach, was used to pick the sample for the in-depth interview as well as the survey questionnaire. Both the in-depth interview and survey questionnaire participants were of both sexes, from all socioeconomic statuses, owned at least one dog, and had bought dog food at least once in the three months before. The following is a summary of the research's sampling strategy.

3.2.1 In-depth interview sampling plan

Ten participants were chosen as part of the sample strategy for the in-depth interview, as shown in Table 1.

Table 1: Face to Face interview sampling plan

Gender	Five males and Five females
Socioeconomic Status	All
Behaviour	Owens at least one pet. Purchased pet food at least once within the last three months
Sample Size	10 Participants
Sampling Method	Convenience Sampling

3.2.2 Survey questionnaire sampling plan

As shown in Table 2, the online survey collected information from 75 participants in total about the sampling strategy for the survey questionnaire.

Table 2: Survey questionnaire sampling plan

Gender	All
Socioeconomic Status	All

Behaviour	Owns at least one pet. Purchased pet food at least once within the last three months
Sample Size	75 Participants
Sampling Method	Convenience Sampling

3.3 Data collection

- Two respondents were chosen for a practice run of the interview procedure prior to performing the actual in-depth interview in April 2023. Face-to-face contacts were used to conduct each individual interview, which lasted around 5 to 10 minutes and was scheduled at the respondents' convenience.
- The survey questionnaire, intended to be completed within 5-6 minutes, was circulated via messaging applications for personal connections, as well as through Facebook and LinkedIn groups, between March and May of 2023.

3.4 Data analysis plan

- Plan: Collect and organize data from interviews and surveys into Excel sheets. Analyse demographics, behaviour patterns, and attitudes toward pet food purchases using descriptive statistics and cross-tabulations in Excel. Use visualization software to create charts that present key insights for stakeholders. Compare results from both survey questionnaires and in-depth interviews to understand market trends comprehensively.
- Conclude: Draw conclusions based on the analysis of the research objectives' interpretation, making recommendations for further action or research as needed.

CHAPTER 4

4 RESULT & DISCUSSION

4.1 Exploratory research

The purpose of this exploratory research was to gather information on consumer behaviour and attitudes towards pet food, specifically with regards to organic ingredients and brand preferences. In order to achieve this goal, a combination of secondary sources and in-depth interviews were utilized. `

4.1.1 Key findings from secondary sources

4.1.1.1 Pet population in India (Historic and forecast overview):

Fig.1

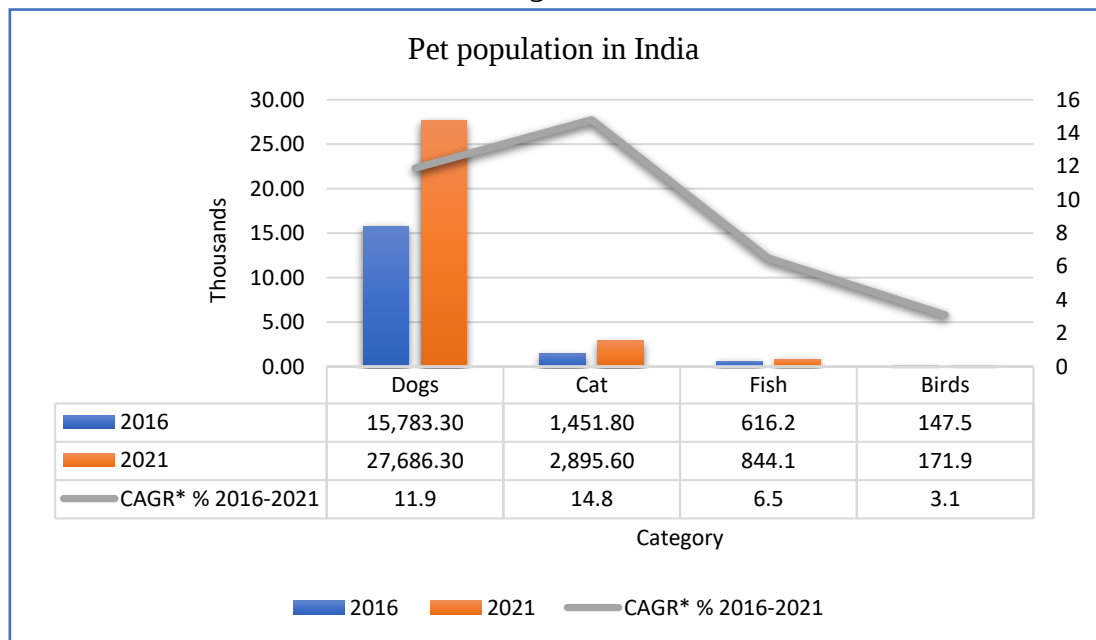
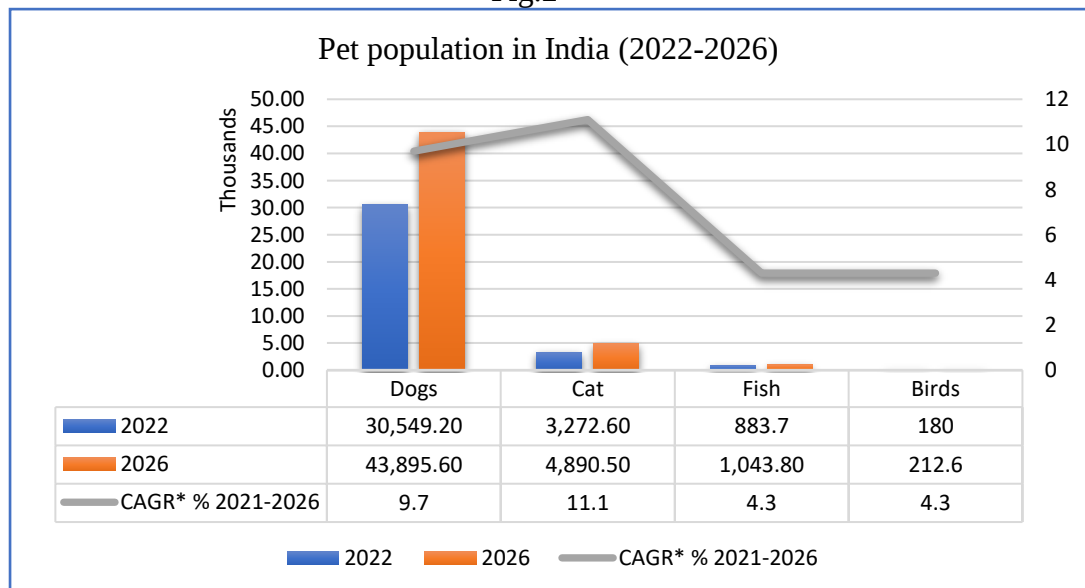


Fig.2



Discussion and finding:

- Dogs: From 15,783.3 thousand in 2016 to 27,686.3 thousand in 2021, the number of dogs has increased significantly. The Compound Annual Growth Rate (CAGR) for this is 11.9%. Whereas dog population is projected to increase from 30,549.20 thousand in 2022 to 43,895.60 thousand in 2026. The (CAGR) for dogs during this period is 9.7%. While the growth rate has slightly dropped compared to the former period (2016-2021), dogs are still anticipated to remain the largest pet.
- Cats: The number of cats has greatly grown as well, going from 1,451.8000 in 2016 to 2,895.6000 in 2021. Cats grow abrupt than dogs, with an average annual growth rate of 14.8%. From 2022 to 2026, the population is envisioned to increase from 32.726 million in 2022 to 48.905 million in 2026. The CAGR for felines is 11.1%, indicating a fairly advanced growth rate compared to dogs. This suggests an uninterrupted increase in cat power and a rising preference for felines as pets.
- Over the past five cycles, fish have seen moderate growth in fashionability as pets with their population adding from 616.2 thousand to 844.1 thousand and a CAGR of 6.5%. Birds have shown slower growth compared to other orders with figures rising from 147.5 thousand to only 171.9 thousand over the same period and a CAGR of just 3.1%, indicating fairly stable or slower power trends for birds.
- In general, with a predicted total pet population of 34,885.50 thousand in 2022 rising to 50,042.50 thousand in 2026, the pet population is anticipated to maintain its growing trend overall. This reflects the ongoing significance of pets in people's lives and a strong overall growth rate in pet ownership.

4.1.1.2 Pet Ownership in Indian Household:

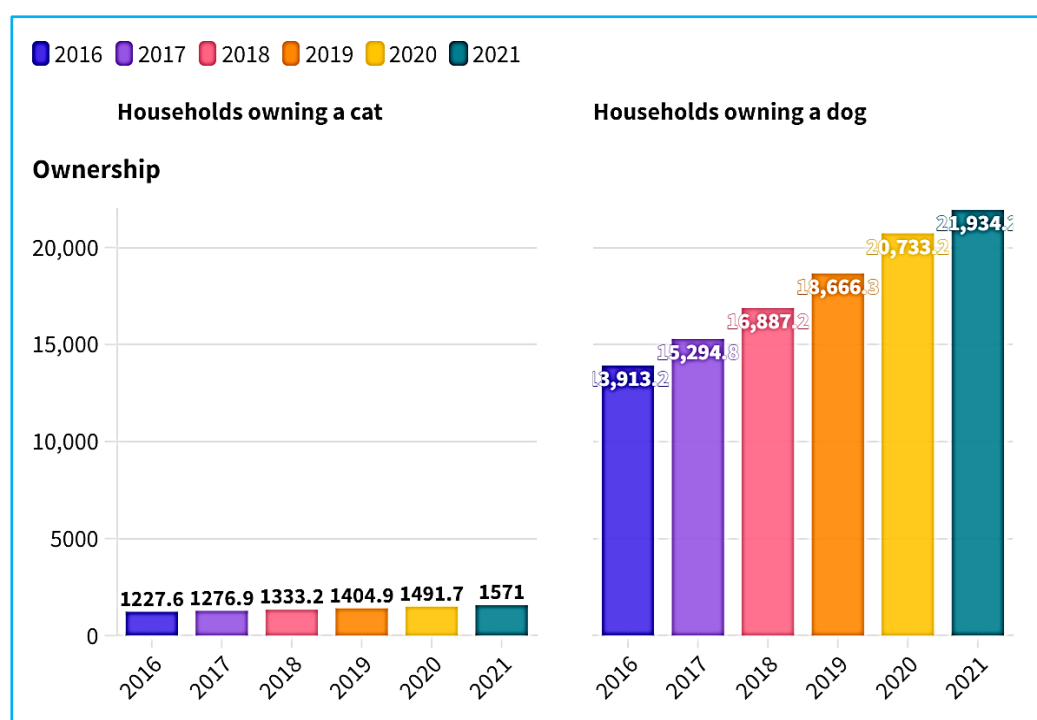


Fig. 3

Discussion and finding

- Between 2016 and 2021, the percentage of cat-owning households increased by 21.2%.
- Among 2016 and 2021, the fraction of households with dogs climbed by 48.3%.
- Cat-owning families are increasing at a slower rate than dog-owning households.
- The data indicates that there are ever more houses with pets. The prevalence of pet ownership in Indian households is multifaceted. Contributing factors include the increasing trend towards solitary living arrangements, as well as empty-nest syndrome and a growing preference for animal companionship. Interestingly, while felines have recently experienced an uptick in popularity among society's elite circles, canine companions still reign supreme across the nation. This may be due to cats' perceived lower maintenance requirements compared to their doggy counterparts; indeed, many perceive them as independent creatures who require less food and attention overall.
- The information is a great resource for comprehending India pet ownership patterns. It may be used to monitor the expansion of the pet ownership demand, identify the most well-liked pet categories, and forecast the direction of the pet market.

4.1.1.3 Top Company retail market share

Market Share for Dog food (Top Company's)

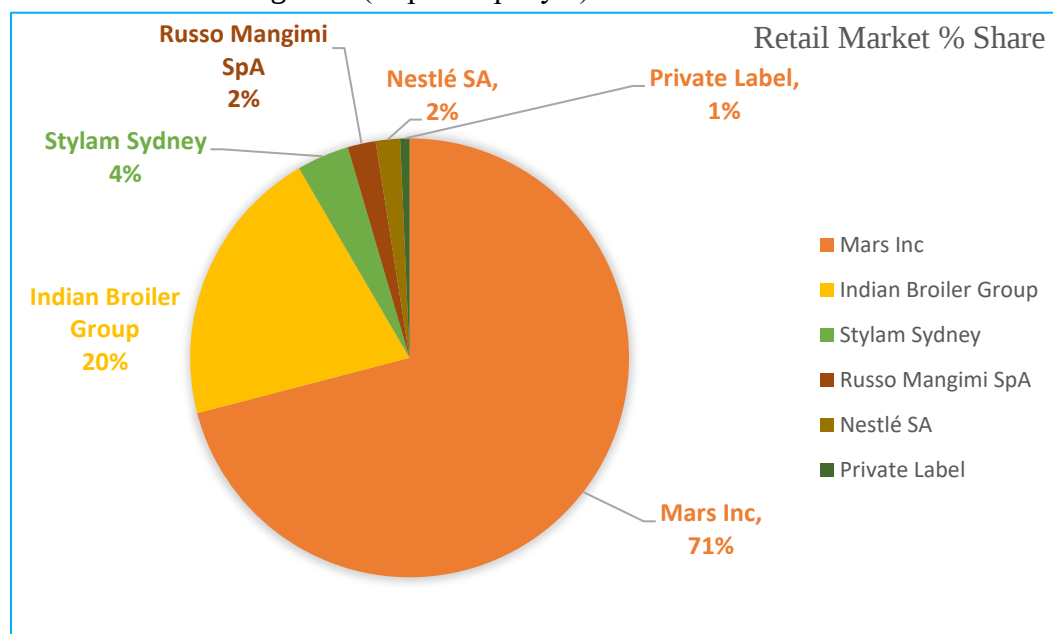


Fig.4

Market Share for Cat food (Top Company's)

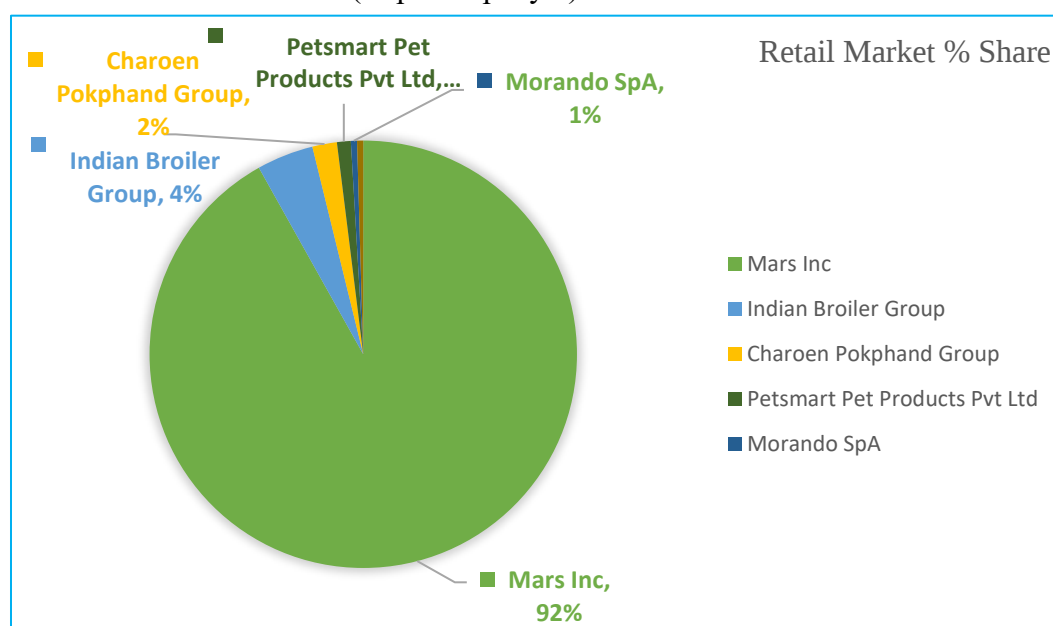


Fig 5

Discussion and finding

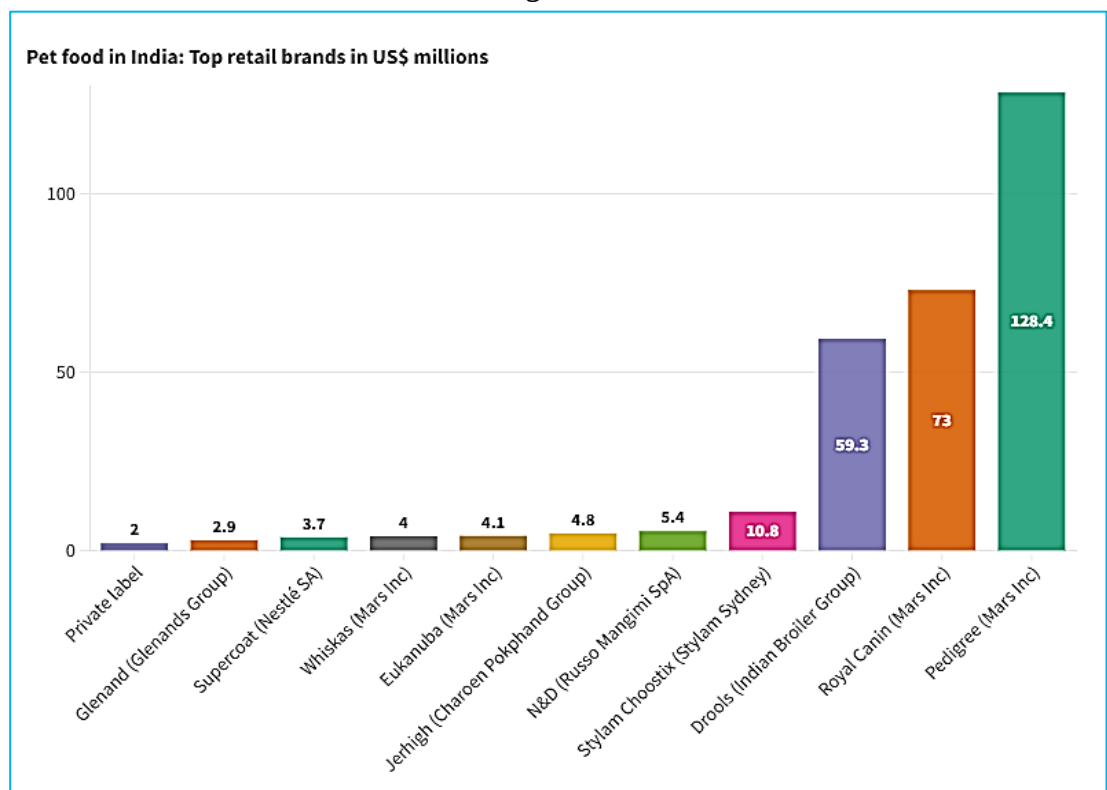
- In 2021, Mars Inc. was the largest cat food company in India with a market share of 92%. Indian Broiler Group saw an increase in CAGR from 2.6% to 4%, while Midwestern Pet Foods Inc experienced a decline from .02% to .01%. Mars International India Pvt Ltd remained at the top due to their flagship brand Whiskas

and expanded by introducing new products such as Whiskas Tasty Mix Wet Cat Food and Iams cat food.

- Mars also held a strong position for dog food offerings with leading value market share representation of around half (51.5%) alongside companies like Indian Broiler Group capturing approximately 15%. While Mars' shares slightly decreased since their recorded data in 2016, Nestlé SA grew by about 47% recording market growth rates reaching in between 0.06 % to 1 %. Private label dog foods kept its state unchanged representing 0.05 % of the overall market share reference.

4.1.1.4 Top retail Brand (Pet Food)

Fig.6



Discussion and finding

- The pet food industry has seen rising demand and sales in recent years, with established brands competing against online start-ups specializing in organic or health-targeted products.
- In India, Pedigree (Mars Inc) reigns as the most prominent brand with US \$128.4 million in retail sales in 2021 an impressive CAGR increase of 18.3% from its previous figure of US \$55.4 million five years ago; following closely is Royal Canin at US\$73.0 million and attained an exceptional CAGR surge of up to 15.2%.

- Drools (Indian Broiler Group), a famous retail brand that garnered the highest rate of 23% during the historic period, while Super coat (Nestlé SA) emerged impressively into market ascendancy with a notable 68% increase since its launch back in 2019, raking in US\$ 3. million by 2021.
- Private-label pet food brands also experienced a considerable uptick by 17%, boosting their retail sales to US \$ 2 million from their earlier figure of just US 9 million in way back in 2016.
- Owing to likely factors as innovation and affordability this significant growth pattern replicates widely across the pet food industry globally.

4.1.1.5 Year on Year Growth of respective company:

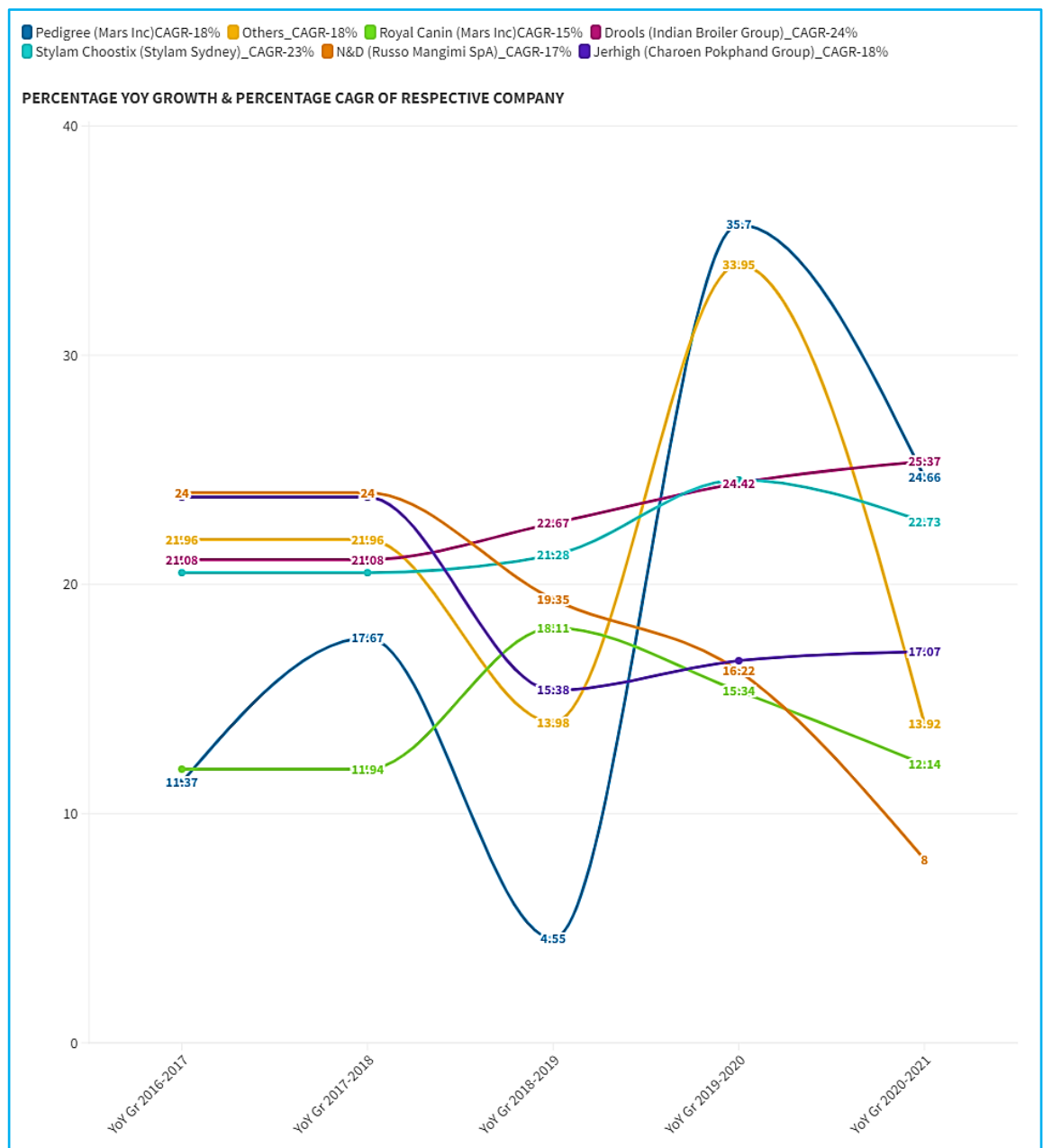


Fig.7

Discussion and finding

- The growth patterns of various brands have been analysed, providing an insight into their performance. Pedigree witnessed fluctuations in its growth rates over the years with a significant spike of 35.70% from 2019 to 2020 followed by a slightly lower rate of 24.66%.
- The Others/Private Label category-maintained consistency around the mark of about 20%, reaching up to an impressive high-growth rate at one point, but settling at just under half that number in recent times.
- Royal Canin exhibited mixed trends throughout its analysis period, boasting higher growth rates earlier on before declining somewhat down the line.
- Drools and Stylam Choostix -showed relatively stable progressions ranging within similar brackets across different periods.
- N&D's initial explosion was unfortunately short-lived as it eventually experienced lower than average scores towards the end which is rather unsatisfactory considering all other analysed labels stayed consistent or reached new heights during those same years.
- Jerhigh has proven itself consistent and trustworthy sporting slight increases year after year without any drastic changes for better or worse along this timeline laid out here today.

4.1.1.6 Product category-Forecast”

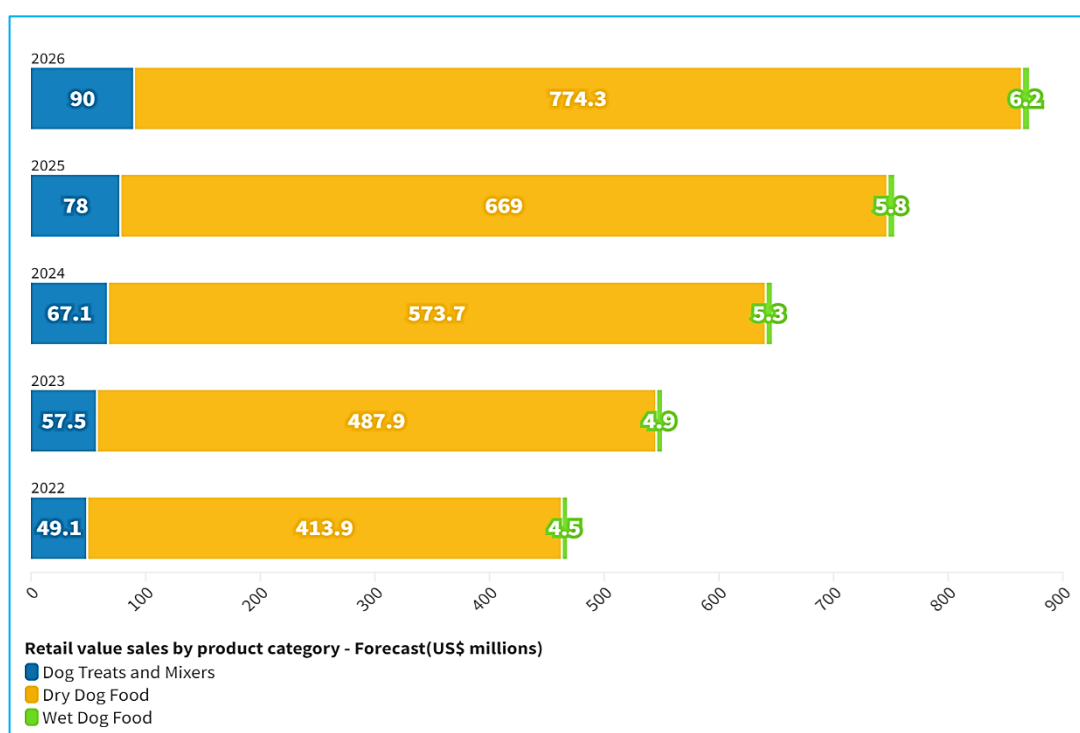


Fig.8

Discussion and finding

- Over the years, India's retail sales of canine-related goods have been steadily increasing. Between 2022 and 2026, the market for dog treats and mixers is predicted to rise significantly, from 49.1 million rupees to 90 million rupees, demonstrating an unrelenting rising trend in this category.
- Similarly, dry dog food has witnessed stable expansion as well; with sales projected to increase significantly from INR413.9 m (2022) up until INR 774.3m by the year-end of the forecasted period- indicative of it being much sought-after during that time.
- Conversely, wet dog food's retail figures trail behind both categories stated earlier; however modest gains will still be realized going from INR4.5m (2022), rising gradually up till reaching around at least six points two crore Indian Rupee mark come to an end-of-period noted herein.
- All indications highlight positive market conditions for these product sectors across India's regions encouraging possibilities to abound.

4.1.1.7 Imports (Top countries):

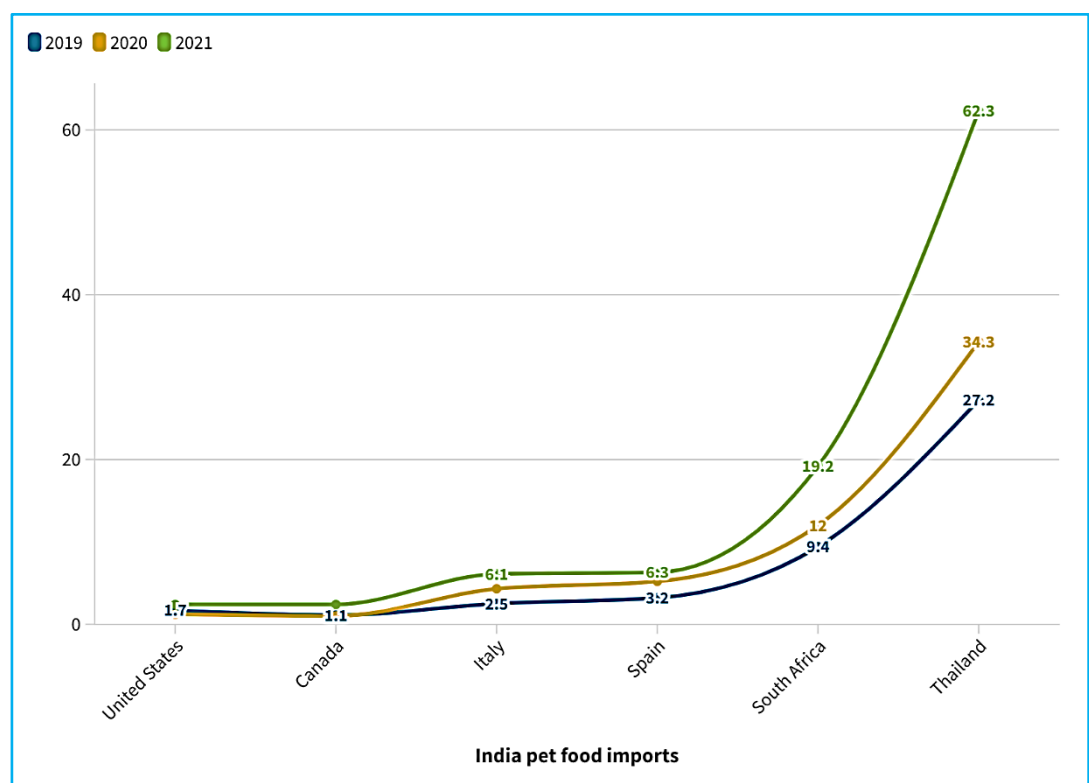


Fig.9

Discussion and finding

- Thailand has emerged as the leader in imports, with an impressive import value of 62.3 million US dollars in 2021 a remarkable increase from its previous figure

of 27.2 million US dollars back in 2019; Such growth is indicative of Thailand's burgeoning impact on the global import market.

- Similarly, South Africa witnessed steady gains throughout recent years. Its current import worth stands at \$19.2 M compared to \$9.4 M just two years ago indicating that the economy's demand for imported goods has risen considerably over time.
- Spain also saw marked improvements since they registered a rise from USD\$ 3 .2M (in '19) to USD\$ 6 3 M by mid-'21 and this points towards healthier trade activities between them and other foreign countries.
- In Italy too there was strong consistency observed when it comes to importing products into their country: data reveals that imports values increased from only USD\$2 .5M during early period analysis until hitting almost double figures at around six-point-one-million-dollars, which indicates significant development within Italy's economic climate-related particularly toward global trading partners who are keenly interested about what happens inside Europe!
- Looking further westwards Canada alongside the United States has experienced some progressions too even if not quite as pronounced- yet nonetheless still noteworthy considering each nation's continued pursuit 'to grow' while increasing demands continue being met through ever-expanding international ties & collaborations designed specifically aimed directly benefiting local economies here stateside north America overall.

4.1.2 Key findings from Face-to-Face interview

4.1.2.1 Respondent outlines for Face-to-Face interview (Table.3)

Sl. No	Name	Age	Profession	Type of Pet	No of Pet
1	Aditya	35	Software Engineer	Dog (Labrador Retriever)	2
2	Rohan	45	Businessman	Persian cat	3
3	Sameer	28	Fitness Trainer	Dog (German Shepherd)	1
4	Rajesh	31	IT Professional	Dog (Beagle)	1
5	Rohit	35	Business Owner	Dog (Golden Retriever)	2
6	Anjali	24	Student	Cat (Siamese)	3
7	Sneha	36	Business Analyst	Pair of Budgerigars (parakeets)	2
8	Aishwarya	40	Homemaker	Dog (Pomeranian)	1
9	Ritu	48	Writer	Dog (Shih Tzu)	1
10	Shruti	38	Homemaker	Dog (Pug, Labrador), Cat	3

4.1.2.2 Purchase Networks:

Some of the response from the Interviewees are mentation bellow:

- ✓ I prefer to buy pet food online because it's more accessible.
- ✓ I prefer to buy pet food both online and in- store.
- ✓ I prefer to buy pet food online because it's frequently cheaper.

If we look into the overall response among the 10 respondents, we found that, more than half of pet owners, specifically 55%, opt to buy their pets' food online. This preference demonstrates the convenience that online shopping provides for a substantial portion of pet owners. Meanwhile, 25% still prefer purchasing in-store indicating that there are those who appreciate physically assessing products before making a purchase decision. Remarkably, one-fifth or about 20% prefer both alternatives as they see the advantages offered by each method and select which option to utilize depending on particular needs.

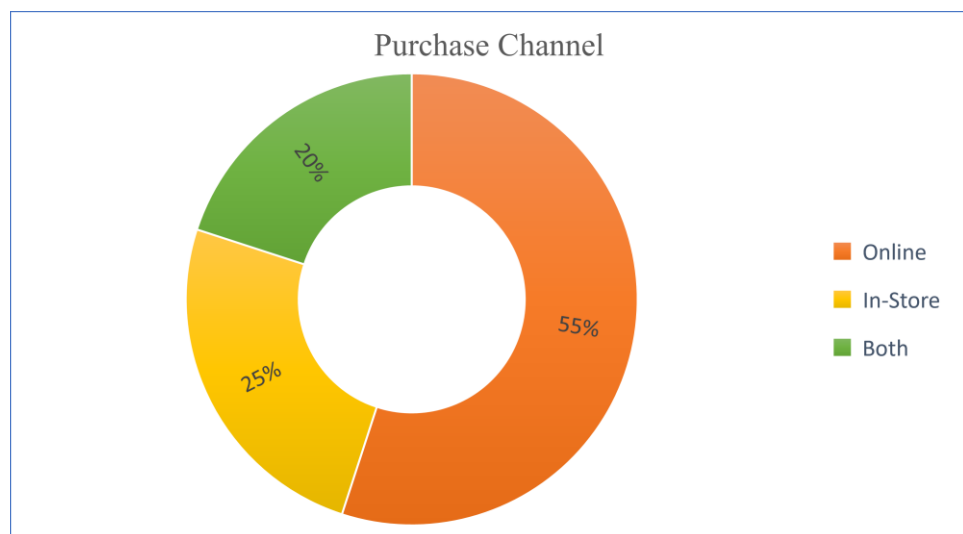


Fig.10

4.1.2.3 Frequency of purchasing different type of Pet food:

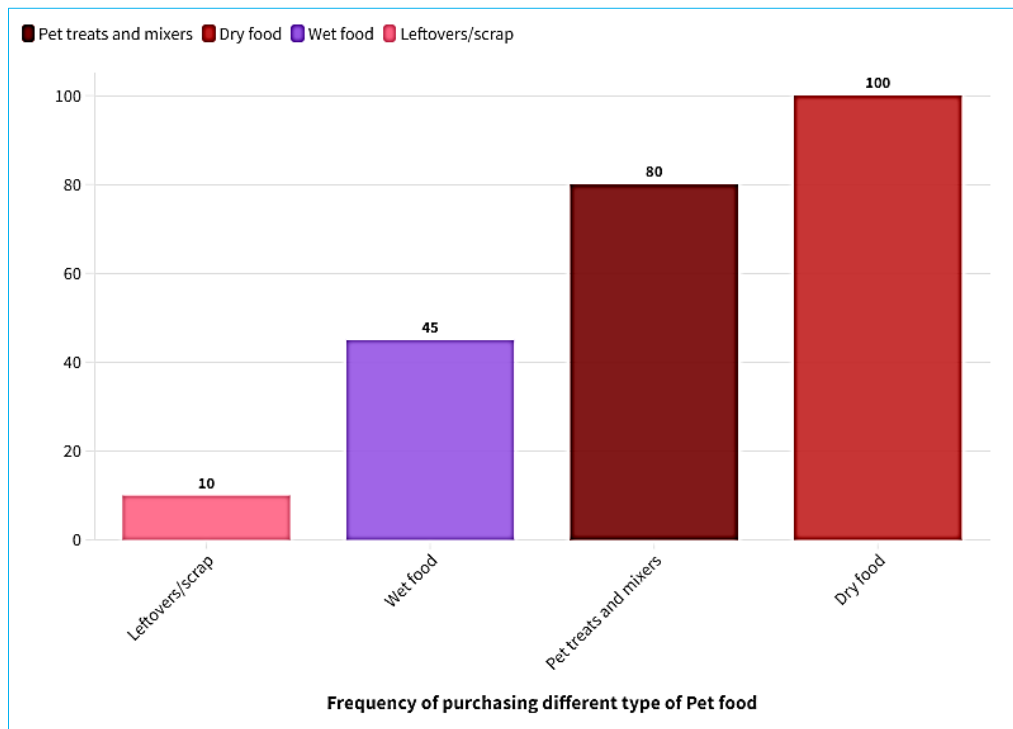


Fig 11

The responses show that the pet owner simply feeds their pet dry food. also, they give precious treats and mixers 80 of the time, wet food 45 of the time, and leaving scrap only 10 of the time. These choices reflect an applaudable commitment to icing a nutritional diet for their canine companion dry kibble is packed with vital nutrients; treats and mixers offer variety; wet foods keep pet hydrated while reducing waste through scraps or leavings.

4.1.2.4 Pet Food Purchase Frequency

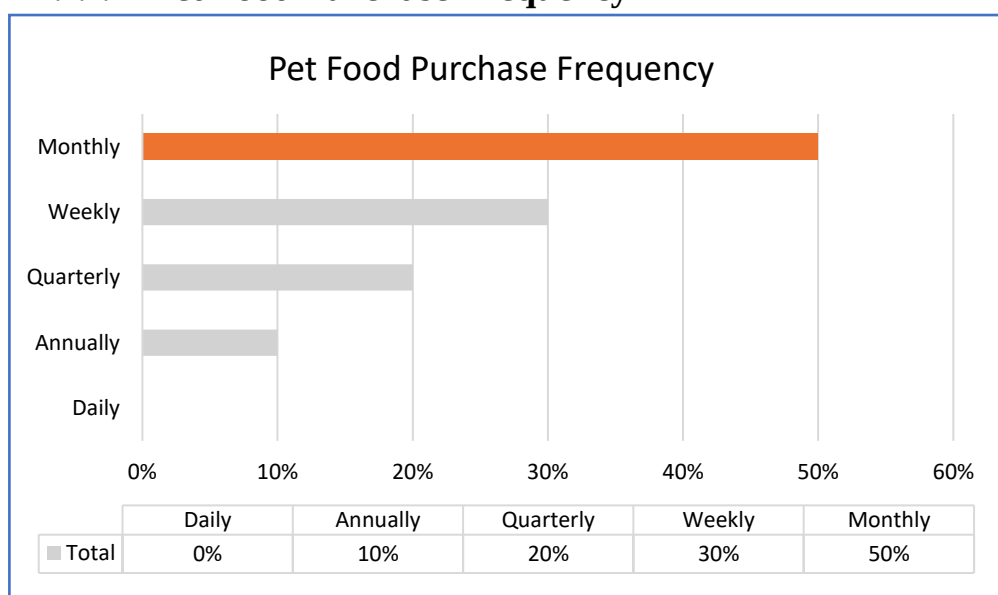


Fig.12

None of the ten respondents mentioned purchasing pet food on a daily or monthly basis. The most prevalent frequency was monthly, followed by weekly and quarterly. These findings demonstrate a wide range of purchasing trends among pet owners when it comes to pet food.

4.1.2.5 Factors that impact the choice of pet food purchase

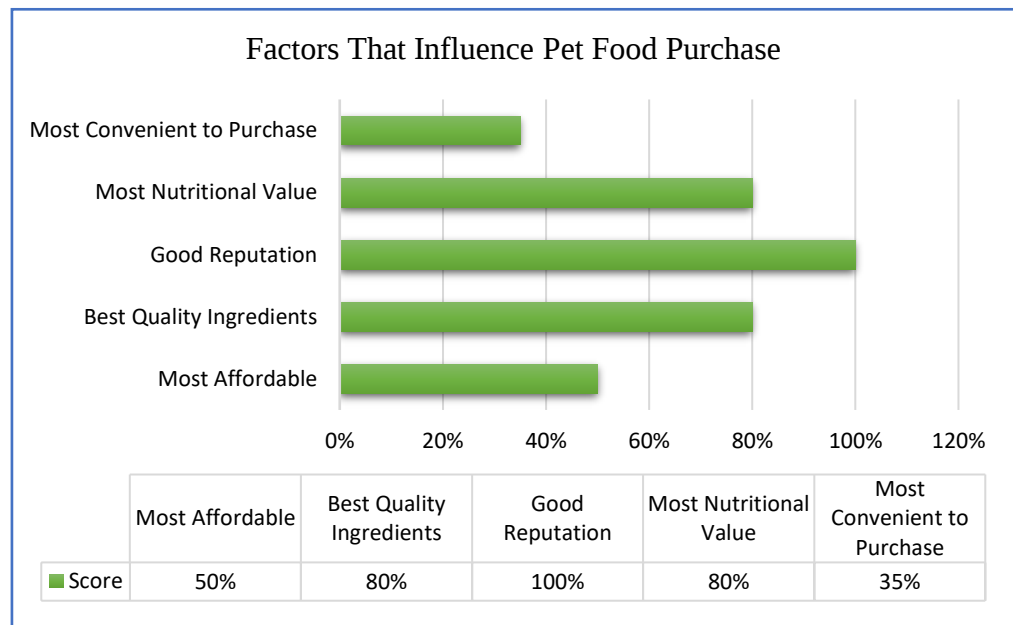


Fig.13

Most Affordably Priced quality received a 50% rating, showing that pet owners' decisions are moderately influenced by cost. Good Reputation, on the other hand, received the maximum score of 100%, highlighting how important a brand's reputation is to pet owners. Their choice of pet food is significantly influenced by how reliable and trustworthy they perceive a brand to be. The analysis reveals that pet owners prioritize attributes such as good reputation, best-quality ingredients, and nutritional value when making their pet food purchasing decisions. Factors such as affordability and convenience, while still considered, may have less influence compared to the other attributes. Understanding these characteristics enables pet food makers and sellers to respond to pet owners' tastes and priorities in order to effectively satisfy their demands. In adjunct, co-authoring this report has given us a better grasp of the present situation of the pet food request and its consumer base. There's a significant increase in demand for high- quality, healthy pet food products that promote beast weal and sustainability. As a result, manufacturers and retailers must maintain translucency about their sourcing programs while contemporaneously taking sweats to reduce their environmental effect.

4.2 Descriptive Research

4.2.1 Key findings from Survey:

The online survey collected information from 75 participants in total.

4.2.1.1 Respondents' profile for Online Survey

<i>Profiles (n = 75)</i>	<i>Response %</i>
<i>Gender</i>	
<i>Male</i>	36%
<i>Female</i>	64%
<i>Age</i>	
<i>21 – 30</i>	30%
<i>31 – 40</i>	49%
<i>41 – 50</i>	16%
<i>51 – 60</i>	5%
<i>Above 60</i>	0%
<i>Residence Type</i>	
<i>Apartment</i>	50%
<i>Flat</i>	40%
<i>Townhouse</i>	5%
<i>Single-detached house</i>	5%
<i>Profession</i>	
<i>Corporate Employee</i>	39%
<i>Businessman</i>	18%
<i>Fitness Trainer</i>	9%
<i>Homemaker</i>	10%
<i>Student</i>	4%
<i>Freelance</i>	20%

Table.4

Discussion:

- The data at hand unveils a clear trend of skewed gender representation towards females, with 64% identifying as such. It is worth noting that the majority of respondents belong to the age bracket within 31-40 years' range, which makes up nearly half (49%) of our sample group. The younger demographic between ages 21 and 30 accounted for around one-third (30%). Interestingly enough, no respondent over sixty participated in this survey.
- When it comes to residence types among participants surveyed here, apartments emerge as an overwhelming favourite choice constituting slightly above half (50%), followed by flats representing another significant percentage (40%). Townhouses and single-detached houses lagged behind significantly at just about five percent each.

- Analysing professional categories served us some exciting results too! While corporate employees constituted almost forty percent (39%) of surveyed people indicating their profession; entrepreneurs or businessmen made up only eighteen percent (18%). Meanwhile fitness trainers resonated with nine-percent figures while homemakers trailed closely behind them (knocking on ten percent). A mere four percent belonged in student category but what surprised statisticians was freelancers had represented twenty percent for themselves.

4.2.1.2 Respondents' no. of Dogs/Cat owned:

Out of 75 respondents 45 are own dog and 25 are own Cat.

Profiles (n = 75)	Response %	Profiles (n = 75)	Response %
No. of Dogs Own		No. of Cat Own	
1	53%	1	60%
2	31%	2	32%
3	6%	3	5%
4	10%	4	3%

Table.5

Discussion:

- The majority of profiles (53%) own one dog, with single-dog ownership being the most common. Ownership decreases for those owning two dogs (31%), three dogs (6%), and four dogs (10%). Among surveyed profiles, 60% own one cat, decreasing for those owning two cats (32%), three cats (5%), and four cats (3%). The results show that both one dog and one cat are commonly owned by this group of participants indicating a preference towards single-pet ownership patterns. These insights provide valuable information about pet ownership preferences among the surveyed group.

4.2.1.3 Monthly Spending:

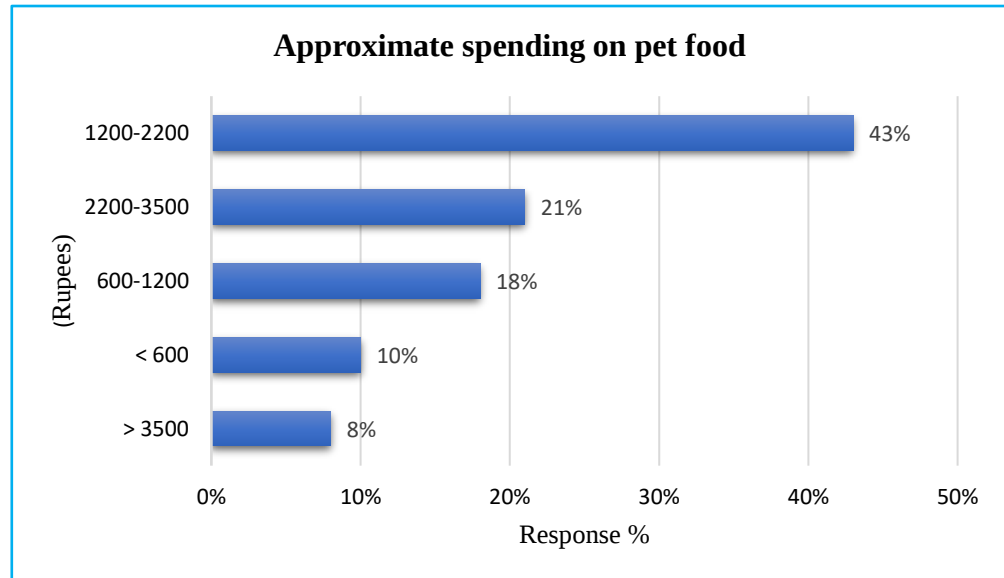


Fig.14

Discussion:

- The findings reveal that 43% of the respondents have a monthly spending range between 1200 to 2200 Rupees for their pet food expenses, indicating a considerable allocation towards it. Interestingly, around 28% fall below this bracket with notable percentages at <600 and within the range of 600-1200 Rupees demonstrating an economical approach in their spending habits.
- On the other hand, about one-third (29%) divulged investing above Rs.2200 per month on premium or specialized pet food options where significant proportions (21%) spent within Rs.2200 -3500 while few allocated more than Rs.3500 per month.
- Overall, data signifies diverse monetary preferences amongst surveyed individuals when it comes to purchasing pet foods; some moderate investors tend to spend moderately whereas others prioritize quality over budget constraints without compromising taste and nourishment aspects' standards.

4.2.1.4 Key Attribute affecting purchasing decision:

When making a purchasing decision, there are many factors to consider such as perception and reputation. Some of the key factors that came out by conducting survey are-

4.2.1.4.1 Preference of Packaging



Fig.15

4.2.1.4.2 Preference of Nutritional value:

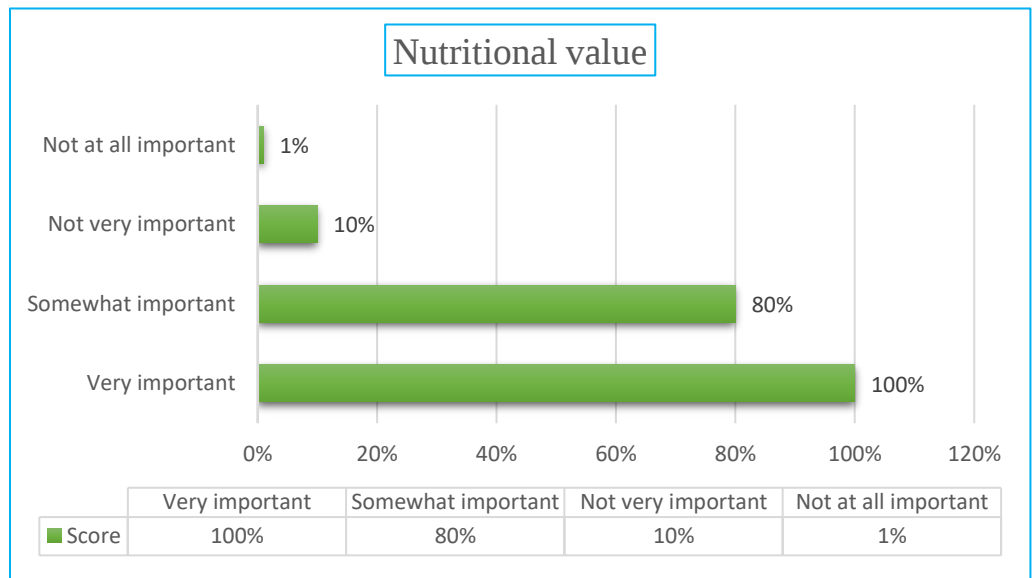


Fig.16

4.2.1.4.3 Switch to another brand:

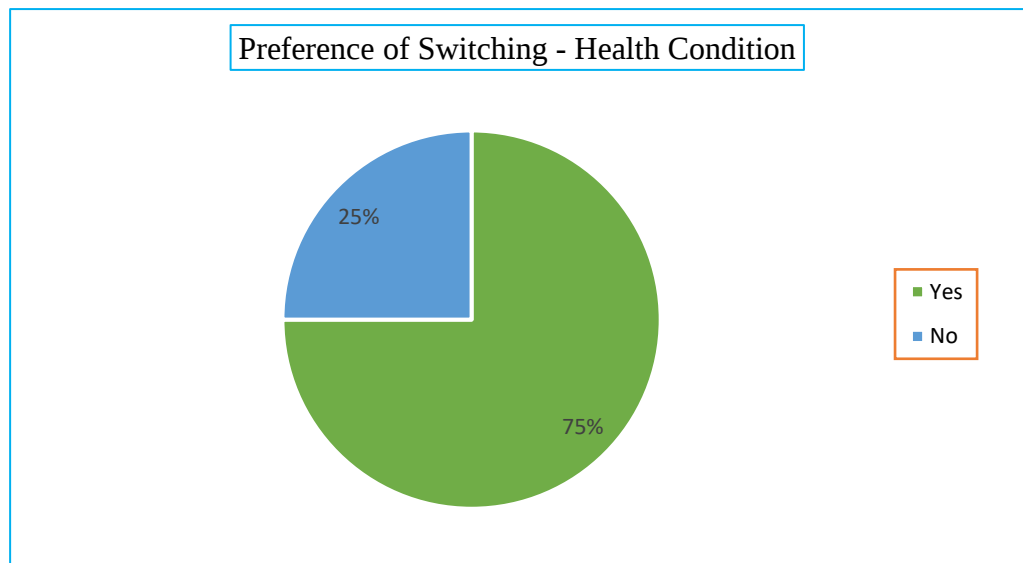


Fig.17

4.2.1.4.4 Preference for availability of free samples:

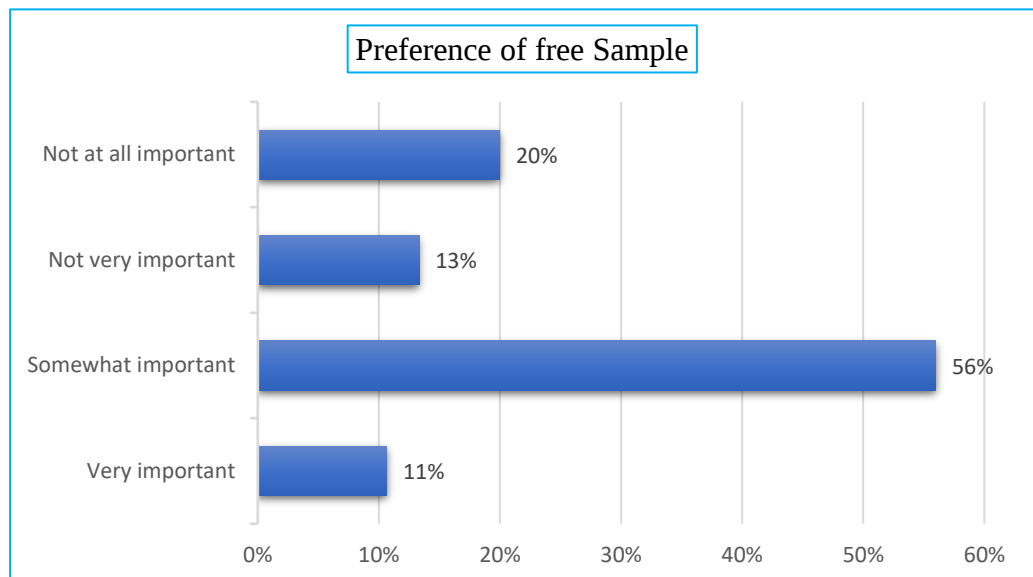


Fig 18

4.2.1.4.5 Recommendations of veterinarians:

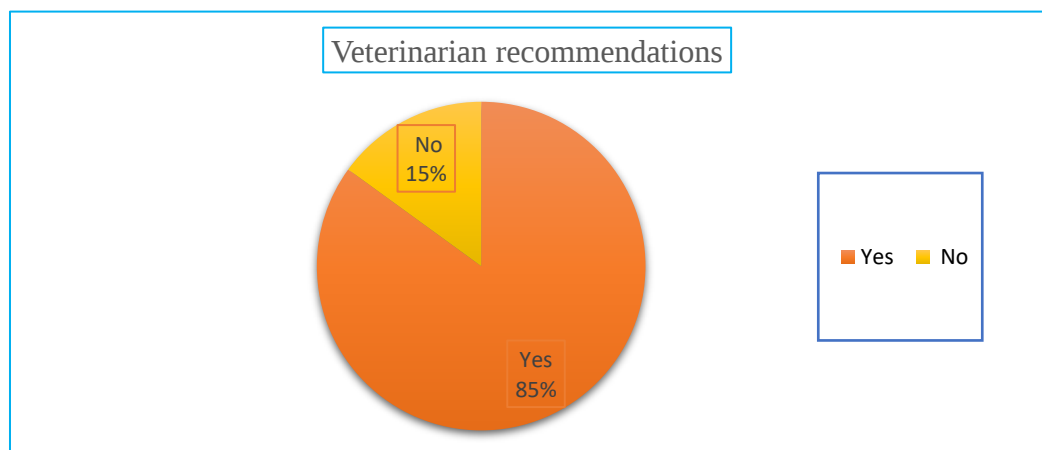


Fig.19

Discussion:

- In the world of pet food, packaging reigns supreme. According to a survey of avid pet owners, 85% consider attractive and informative packaging to be critical in their decision-making process. Additionally, health condition is crucial when selecting nutrition for pets; an overwhelming majority (75%) cited it as a factor that affects their choices.
- While only 11% value free samples above all else, over half (56%) still find them somewhat important - underscoring how such promotions can pique interest and lead to increased sales conversions.
- For those searching for guidance on what's best for furry friends' diets? Look no further than recommendations from veterinarians: just like human doctors provide expert opinions about our own well-being needs, specialists trained in veterinary science are trusted by respondents at an impressive rate of 85%.
- Last but not least: nutritional content certainly matters! Every participant deemed this element very significant while another four out of five rated its importance as somewhat high - demonstrating unequivocally that discerning dog- and cat lovers alike seek quality ingredients with beneficial effects upon ingestion.
- All in all? When crafting products or marketing strategies aimed towards animal-loving consumers who expect nothing less than top-tier offerings where nourishment is concerned -- bear these aspects firmly in mind!

CHAPTER 5

5 CONCLUSIONS

In a nutshell it's important to comprehend the buying habits in order to make sure that pets are well nourished. The difficult challenge of educating people on the best ways to feed their pets is made more difficult by escalating promotional claims, inaccurate information on pet nutrition, and the impact on patterns from the human wellness and nutritional sector onto the market for pet foods. However, the close relationship pet owners share with their animals, their commitment to giving them the finest nutrition possible, and their reliance on the veterinarian's medical professionals on nutritional guidance offer an incredible chance. Specialists of the animal healthcare team must comprehend the underlying reasons behind pet food purchases in order to give their clients precise nutritional recommendations.

An evident and rapid expansion of the pet business is due to of communal cultural trends. The socialisation of livestock nowadays leads homeowners to seek ways to enhance the standard of existence for their beloved companions. As result, there is a rise in need for more sophisticated and innovative pet-related services and products.

Since these have a direct connection to the well-being and lifespan of the livestock, pet meals receive the greatest in proportion of investment from pet owners. As a result, the discipline of veterinary medicine is always expanding and evolving. For a good status, nevertheless, investors must prioritise inventiveness, healthy components, dependable vendors, qualified offerings, and quality in the service offered.

Products for full and nutritious pet nutrition are designed to be the only source of nourishment for a pet. The majority of pets remain alive primarily by feeding them a constrained selection of commercial goods and a small number of production batches over an extended period of time. The effect of a pet's diet and, consequently, food safety risks on health is more comparable to that of an infant than to that of an older person who consumes a variety of foods.

The variables considered in this study's analysis show a variety of components that might affect dog buyers' choices. Age, gender, ethnicity, income, education, prior dog ownership experience, and household structure are all human-related factors. Demographic factors including gender, age, and income are also mentioned as potential influencers of desire or conduct in connection to where to buy a dog. Social variables,

such as trends in breed popularity, appear to have an impact on people's decisions on what type of dog to purchase.

Furthermore, social influences, such as trends in breed popularity, appear to impact judgements on which breed of dog to adopt. The research results examined in this review also point to the significance of numerous canine-related characteristics that frequently influence the choice of a potential owner. The physical features, behaviour, and temperament of a dog influence the preferences and acquisition choices of their owners. Although some consider health when choosing a breed, appearance appears to be more important than well-being.

The studies suggest that owner traits and dog characteristics impact the behaviour of potential dog owners. However, further research is necessary to better understand how these factors interact precisely. This review identified limitations in previous research including reliance on correlations and retrospective data analysis. Addressing these issues can improve our understanding of pet ownership motivations and behaviours. The causation of any connections found is thus still largely unknown.

To advance knowledge that will help to shape tools and strategies for the efficient education of potential owners, to encourage responsible acquisition practises, and to assist those working in the dog rescue environment in improving their capacity to draw in suitable prospective owners and advance canine welfare, more well-designed studies are therefore necessary. This topic has also highlighted the necessity for further research on the environmental elements that influence human behaviour in addition to knowledge alone in order to create methods to support responsible dog ownership.

CHAPTER 6.

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Annexure -1

Questionnaires

1. What's your age? (Single Answer)
 - Below 21
 - 21 – 30
 - 31 – 40
 - 41 – 50
 - 51 – 60
 - Above 60
2. What type of residence do you live in? (Single Answer)
 - Apartment / Flat
 - Townhouse
 - Single-detached house
3. Do you currently own a pet?
 - Yes
 - No
4. What type of pet(s) do you currently own? (Select all that apply)
 - Dogs
 - Cats
 - Birds
 - Fish
 - Small mammals (e.g., rabbits, guinea pigs)
 - Reptile
 - Other (please specify) _____
5. How many pets do you currently own?
 - 1
 - 2
 - 3 and more
6. How often do you purchase pet food for your pet?
 - Daily
 - Weekly
 - Monthly
 - Quarterly
 - Annually
7. How do you choose which brand of pet food to purchase?
 - Price
 - Quality
 - Brand reputation
 - Nutritional value
 - Availability
8. Do you consider the packaging of pet food (e.g., can vs. bag) when making a purchasing decision?
 - Yes
 - No
9. How important is the nutritional value of pet food in your purchasing decision?
 - Very important
 - Somewhat important
 - Not very important
 - Not at all important
10. How important is the price of pet food in your purchasing decision?
 - Very important

- Somewhat important
- Not very important
- Not at all important

11. What is your approximate monthly spending on pet food?

- Less than 500
- 500-1000
- 1000-2000
- 2000-3000
- More than 3000

12. How often do you purchase the following Pet food? (1=never, 2=seldom, 3 sometimes and 4=often) (Single Answer)

Type of Dog Food	Never	Occasionally	Sometimes	Often
Pet treats and mixers	1	2	3	4
Dry food	1	2	3	4
Wet food	1	2	3	4
Leftovers/scrap	1	2	3	4

13. Have you ever switched pet food brands due to a change in your pet's health condition?

- Yes
- No

14. Do you prefer to purchase pet food online or in-store?

- Online
- In-store
- Both

15. How important is the country of origin of pet food ingredients in your purchasing decision?

- Very important
- Somewhat important
- Not very important
- Not at all important

16. Have you ever purchased prescription pet food from a veterinarian?

- Yes
- No

17. Do you think the age and health condition of your pet influence your purchasing decision when buying pet food?

- Yes
- No

18. How important is the availability of free samples or trial sizes of pet food in your purchasing decision?

- Very important
- Somewhat important
- Not very important
- Not at all important

19. Do you think the recommendations of veterinarians or pet experts influence your purchasing decision when buying pet food?

- Yes
- No

Annexure -2

Plagiarism Report

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