

MARKET ASSESSMENT OF ANTIHYPERTENSIVE THERAPY IN VARANASI: A COMPREHENSIVE STUDY

Dissertation Submitted to



The IIHMR University, Jaipur

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Master of Business Administration (MBA)

in

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By

Aaditya Trivedi

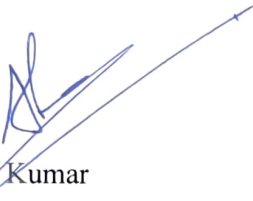
Under the Supervision and Guidance of

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2024

PROJECT CERTIFICATE

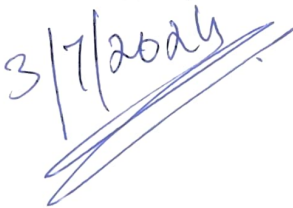
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Saurabh Kumar

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DECLARATION BY STUDENT

I hereby declare that this dissertation titled **Market Assessment of Antihypertensive Therapy in Varanasi: A Comprehensive Study** is the bonafide 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 Information derived from the published or unpublished work of others has been duly acknowledged in the text.

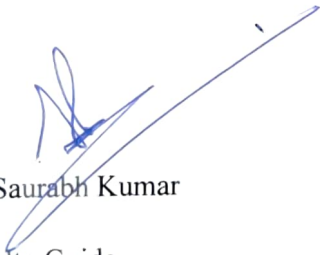
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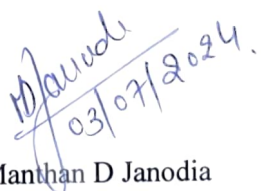


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Date:

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LIST OF ABBREVIATIONS: -

S.NO	Abbreviations	Meaning
1.	ACEI	Angiotensin-Converting Enzyme Inhibitor
2.	ARB	Angiotensin II Receptor Blocker
3.	BHU	Banaras Hindu University
4.	BB	Beta Blocker
5.	CDC	Centres for Disease Control and Prevention
6.	CVD	Cardiovascular Disease
7.	FICCI	International Conference on Healthcare and Management
8.	NFHS	National Family Health Survey
9.	DFU	Diabetic foot ulcer
10.	FSSAI	Food Safety and Standards Authority of India
11.	SPC	Single-Pill Combination

Abstract

In this dissertation, detailed descriptive analysis of antihypertensive therapy markets in Varanasi, India, is provided with qualitative data from a sample of 50 stockists and 50 chemist shops and structured questionnaires, second-hand information drawn from the National Family Health Survey (NFHS). The study investigates the top-selling brands of antihypertensive medications, therapy trends, pricing, and consumer preferences across eight key localities in Varanasi: Sagra, Mahamoorgunj, Cantt, Pandeypur, Bhojubar, Lanka, BHU and Bhelupur. Some of the significant findings include that well-known brands as Amlodipine, Telmisartan, and Metoprolol are mostly used; SPC medicines are becoming more popular because of the convenience and effectiveness of their action. To specifically be able to compare the average price between the three leading brands, observations on how the prices differ on various areas were made. When it comes to hypertension, demographic information and prescriptions show large variations across the nation. Challenges include variability in supply of some drugs, financial factors and difficulty in transport and distribution of the drugs. Some opportunities for the pharmaceutical companies can be pharma companies must look at the prospect of extending networks, raising awareness among the people, and thinking differently when it comes to forms and textures of products for better market reach and new benefits to the patients. There is also suggested that the effective prescribing should be ensured, and the focus should also be on the educational interventions, which can improve adherence. Policy implications highlight the need to develop effective Health Policy Interventions that will help to increase patient's access to the affordable antihypertensive therapies. This study adds to the existing literature and knowledge of the antihypertensive market in a regional context though giving out practical recommendations that would enhance hypertension control and health care provision in Varanasi.

Chapter 1: Introduction

1. 1 Background:

Thus, hypertension, or high blood pressure, is a severe worldwide problem affecting millions of people and is one of the leading causes of cardiovascular diseases, kidney disorders, and strokes. Control of hypertension is fundamental to modifying the morbidity and mortality related to the disease. Antihypertensive therapy entails several drugs like SPCs and second-generation BB that are commonly used to control blood pressure.

Consequently, for a better understanding of the trends in the antihypertensive market, Varanasi in India – a city with a specific demographic and, therefore, epidemiological profile – can be of considerable interest. This is not only due to the city's diverse population but also uneven rates of access to healthcare and other socio-economic circumstances that determine the circumstances under which hypertension should be managed. Understanding the features of the consumer market in Varanasi applied to healthcare services, companies, and policymakers can create a special approach to serving the consumer's needs.

1. 2 Problem Statement:

Despite the existence of several antihypertensive therapies that are available in the market, there is inadequate knowledge in relation to the existing market competition and the patients' preferences in the site selected, that is, Varanasi. Prior studies are inconclusive to indicate distribution trends, cost setting, and preferred formulations of antihypertensive in this zone. This lack of information prevents relevant stakeholders in the health market from making appropriate decisions that would enhance both the quality of care and business performance.

1. 3 Objectives:

The first objective of the proposed study would be aimed to understand the leading brands in the therapeutic segment for hypertension.

This objective revolves around identifying which brands are most popular and their proportion within the market.

To investigate the patterns of therapy, use in clients, including the choice of formulation and how long therapy is used.

This also involves analysis of patient's choice of formulations; whether they prefer tablets or capsules, the length of time the consumer usually takes these drugs, and whether the regimen includes changes or switch over in therapy.

To evaluate the pricing policies in ascertaining the average price of 10 tablets of the three most popular brands and establishing their ability to be purchased by the people in the region. Thus, this objective focuses on the insights about the cost of antihypertensive therapy, its cost to the patients, and the overall financial implications of the treatment.

1. 4 Research Questions:

What are some of the commonly used brands of antihypertensive drugs in the market of Varanasi?

Knowing the highest-ranked brands aids in the understanding of the level of competition as well as the patient's preferences.

In what way does the therapy trend look like, specifically, formulary preference and time of usage?

A comparison of patient therapy profiles allows for the evaluation of subsets of patient compliance and the efficacy of various galenic preparations.

How much do 10 tablets of the three most popular brands cost?

Comparing the cost assists in determining the challenge that it presents in terms of its economic effect on patients as well as the various approaches adopted by the different pharmaceutical firms.

1. 5 Significance of the Study:5 Significance of the Study:

This study is significant for several reasons: This study is significant for several reasons:

Healthcare Providers: This way, the healthcare providers will be able to make the right decision concerning the prescriptions they give to their patients by bearing in mind the competition within the market and the desires of the shoppers resulting in the probability of a better likelihood of (confirming)compliance to the prescriptions given and better results.

Pharmaceutical Companies: Therefore, information about the best brands and prices helps pharmaceutical firms enhance their marketing and price strategies to develop a better market share.

Policymakers: The study provides vital information that can be valuable in the development of policies that would help in increasing the supply of affordable Antihypertensive products,

hence lowering the prevalence of high blood pressure in Varanasi. Policymakers: The findings give important data that could be useful in the formulation of policies meant to enhance the availability of cheap antihypertensive goods and lessen the burden of hypertension in Varanasi.

Patients: In conclusion, the study of gaps in the market provision of antihypertensive treatments seeks to be useful to patients by informing how the provision of the treatments can be enhanced.

1. 6 Scope of the Study:6 Scope of the Study:

The scope of this study includes: The scope of this study includes:

Geographical Scope: The study targets Varanasi for investigation; it selects eight areas of interest, which include Sigra, Mahamoorgunj, Cantt, Pandeypur, Bhojubir, Lanka, BHU, and Bhelupur.

Therapeutic Scope: This paper focuses on antihypertensive treatments SPCs and second-generation BBs.

Methodological Scope: The research work relies on both primary data collected from surveys with stockiest and chemists and secondary data collected from NFHS data and IQVIA reports.

Chapter 2: Literature Review

2. 1 Overview of Hypertension:

Hypertension is a long-term kind of illness that refers to high tensions of blood vessels in the arteries. Presently it is a major world health issue because it acts as a precursor to cardiovascular disease, stroke, and kidney failure. Therefore, proper control of hypertension is a vital step in the prevention of morbidity and mortality in the global population. However, the incidence of hypertension depends on the area and the population, which can be explained by age, hereditary factors, nutrition, living conditions, and income levels.

2. 2 Antihypertensive Therapies:

Antihypertensive treatments refer to the overall pharmacologically oriented strategies and medical interventions with the primary goal of diminishing hypertension and the probability of related complications. Common classes of antihypertensive drugs include Common classes of antihypertensive drugs include:

Diuretics: For example, thiazides and loop diuretics work by lessening the tension in the blood vessels by eliminating sodium and water in the body.

Beta-Blockers: It includes the first generation such as propranolol and the second generation of such drugs as metoprolol inhibiting adrenaline effects on the heart and blood vessels.

Angiotensin-Converting Enzyme (ACE) Inhibitors: Examples include Enalapril and Lisinopril which help to block the formation of the vasoconstrictor hormone, angiotensin II.

Angiotensin II Receptor Blockers (ARBs): Adding some drugs including, losartan and valsartan which inhibit the effects of the angiotensin II in the receptor site.

Calcium Channel Blockers: Like amlodipine and verapamil, they prevent the uptake of calcium in the smooth muscles of blood vessels causing dilation of blood vessels.

Selection of antihypertensive drugs is influenced by the patient's age, the presence of co-morbid conditions, and its side effects. SPCs are among the commonly used combined therapies to improve the effectiveness of the treatment and compliance of patients.

2. 3 Market Dynamics:

The market of antihypertensive pharmacology depends on demographic distribution, epidemic tendencies, political factors of the healthcare system, and economic factors. Getting to understand this challenging area of the market helps companies in the pharmaceutical industry to design the right strategies in marketing their products, strategizing the right prices for their products, and the need to make these products available for people of all classes.

2. 4 Research Gap:

Even though there is abundant scholarly literature documenting the effectiveness and risks of utilizing different antihypertensive drugs, the information concerning the prevailing markets for such medications in Varanasi, India is scarce. Relatively few studies provide a detailed analysis of the use rate and the factors, including price and formulation, that might affect the choice of antihypertensive drugs in this part of the world. This research can fill this gap by offering a clearer picture of the existing market and revealed the preferences of patients in Varanasi.

The articles that are reviewed contribute to the literature base by providing background information on hypertension, existing treatments, and the overall market. So, it serves to give some perspective to the current study's concern with Varanasi to stress the need to fill existing gaps in knowledge to improve healthcare and inform market strategy in the area.

Chapter 3: Research Methodology

3.1 Research Design:

This study therefore employs an exploratory research approach in conjunction with quantitative and qualitative research with a view of obtaining a detailed description of the market assessment of antihypertensive therapy in Varanasi. This implies that the mixed-method approach improves the analysis of primary and secondary data resources.

3.2 Primary Research:

Sampling Strategy: The questionnaires used in the survey are self-administered and targeted on 50 stockists and 50 chemists in eight specific areas in Varanasi namely Sigra, Mahamoorgunj, Cantt, Pandeypur, Bhojubar, Lanka, BHU, and Bhelupur. It also means that a large area of the city provides various markets and consumers' preferences and trends are taken into consideration when using the sampling technique.

Data Collection Instruments: Information from both stockists as well as chemists is obtained with the help of comprehensive structured questionnaires. The questionnaire includes both closed-ended and open-ended questions designed to gather information on: The research uses a Likert type of questionnaire that comprises of closed ended and open-ended questions with a view of assessing the following information.

Top-Selling Brands: The identification of a precise brand about the target consumers and, therefore, its market share.

Therapy Trends: Information on the specifics of formulation, including its format (tablets, capsules), the time for which it was used most actively, and annual trends in prescriptions.

Pricing Dynamics: A comparison of the appropriate price of 10 tablets of the three most used brands to discuss their cost and prices.

Formulation Preferences: These include Basic information concerning patients' preferences depending on the type of formulation that needs to be administered, the strength of the formulation per dose or administration, and how often the formulation should be used.

3.3 Secondary Research:

Data Sources: The secondary research entails the utilization of information that already exists and can be accessed.

National Family Health Survey (NFHS): Hypertension mortalities: outcomes and epidemiology of Varanasi.

IQVIA Reports: Industry reports that contain an outlook into the specified region and an amenity to the greatest therapies within the pharmaceuticals business.

3. 4 Data Analysis:

Quantitative Analysis: Descriptive and inferential analysis techniques are applied on the survey findings taken from one cross-sectional survey that was conducted in Shriner's Hospital for Children. The collected data analyzed will assist in making trends, relations and patterns of the market to be compared from the data obtained from stockiest and chemists.

Qualitative Analysis: Open-ended questions that are used in the survey relate it to the fact that thematic analysis is used for collected qualitative data. It entails converting the responses into codes and grouping them to establish themes on consumer preferences and issues as well as opportunities in the antihypertensive therapy market.

3. 5 Ethical Considerations:

Due to the nature of the study, ethical considerations are observed from the time of data collection up to the end of data analysis. The study objectives, voluntary nature of the participant's participation, and intent for the anonymity of the responses are explained. All the participants are given information about the study in order to enable them provide their consent for the data to be collected.

3. 6 Limitations of the Study:6 Limitations of the Study:

Some of the limitations of the study are that the use of a survey may lead to response bias, the quality of data from secondary sources is not always consistent, and the study SI context is specific to Varanasi and thus the finding may be particularistic.

3. 7 Validity and Reliability:

Precautions are also taken to depict the validity and reliability of the research result or conclusions. To increase the reliability of the study various measures such as pilot testing of the questionnaire, data triangulation, and applying a standardized approach in data analysis are conducted.

3. 8 Data Collection Timeline:

The data collection phase is planned to take 15 days to allow for more data accumulation and analysis in the event the dissertation's submission time approaches.

It presents the detailed method applied in the study to determine the market assessment of antihypertensive therapy in Varanasi. The research will employ a mixed research design that incorporates both quantitative and qualitative data with the

primary objectives of unveiling the flow of the market, consumers' behavior, and understanding the strategic implications to the healthcare stakeholders and pharmacy franchises in the region.

Chapter 4: Performed Data Analysis and Findings

4. 1 Demographic Profile of Respondents:1 Demographic Profile of Respondents:

Most of the respondents were married, educated, and from the working class exhibiting increased potential income which was evident from Stockist and Chemist respondents from Sagra, Mahamoorgunj, Cantt, Pandeypur, Bhojubir, Lanka, BHU, and Bhelupur of Varanasi city. It was seen that the respondents varied about age and experience and belonged to the pharma sector.

4. 2 Top-Selling Brands:

Data analysis of the survey unveiled important information of preferred brands of antihypertensive among people of Varanasi. The following brands emerged as preferred choices among consumers, capturing significant market share: The following brands emerged as preferred choices among consumers, capturing significant market share:

Amlodipine (Norvasc)

Telmisartan (Micardis)

Metoprolol (Lopressor)

The choice factors for the instant brand are effectiveness, cost, and accessibility in various localities of Varanasi.

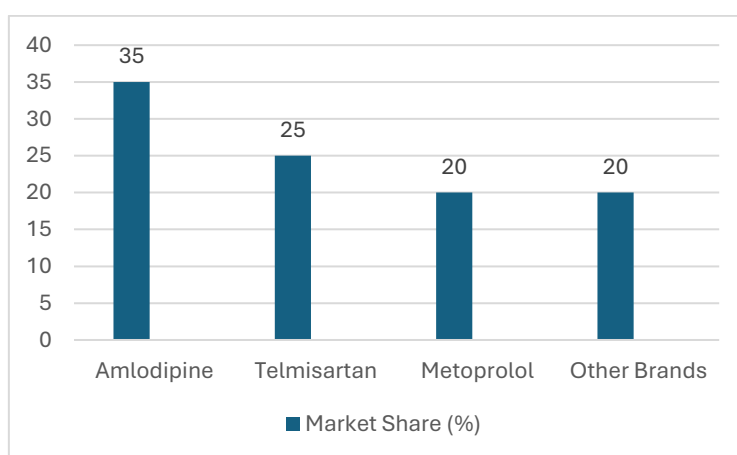


Fig. 1.1: Market share of top selling brands in Varanasi

4.3 Therapy Trends:

Formulation Preferences: It was also established that in Varanasi, patients had a preferred choice for tablet facility over capsule. Such preferences include the following features: easy to administer, often used, and thought to work better than others.

Duration of Usage: Use-related demographic data suggested that the duration of antihypertensive therapy suggested target persistent therapy, as indicated by most patients' sustained use of prescribed treatments across months and years. This reflects the fact that hypertension is a long-term condition hence, the need for individuals to remain committed to the therapies prescribed to them.

Trends in Prescription Patterns: Examining the trends in facilities' prescriptions disclosed an upsurge in the adoption of combination therapies, especially SPCs, which are composed of single pills and easier to administer than multiple drugs.

4.4 Pricing Dynamics:

Average Price of Top-Selling Brands: A comparative analysis of the average price of 10 tablets of the top three brands prevailing in different areas of Varanasi was also done. Some of the things that impact on pricing include the reputation of the brand, the type of formulation, and the strategy of the competing pharmaceutical firms. Pricing was named as one of the key barriers in patients' access to antihypertensive medications, and it implied that medication should remain relatively cheap.

4.5 Formulation Preferences:

Some important observations about the patients' insights on formulation choices are that low dose and once-a-day regimen for the tablets are preferred in Varanasi. This preference is due to patients' comfort and compliance with the set treatment schedules.

4. 6 Challenges and Opportunities:

Market Challenges: Some of the factors include the following: there are some slight complications regarding the distribution, distribution networks, and the availability of some brands of the different drugs from most of the pharmacies was not consistent. The issue of affordability also plays a major role in that the prices were slightly high for some segments of the population.

Opportunities: The pharmaceutical companies have the chance to develop new formulations of antihypertensive medications, to expand the distribution of such drugs, and to coordinate with healthcare providers to promote patients' awareness of antihypertensive medications.

4. 7 Comparative Analysis with NFHS Data:7 Comparative Analysis with NFHS Data:

Comparison of survey findings with NFHS regarding the prevalence of hypertension in Varanasi individuals helped to ground the study in understanding the desire for antihypertensive treatments. The matching of market trends to epidemiological data shows where intervention is needed and in which health services should be invested.

Aspect	Survey Findings	NFHS Data
Prevalence of Hypertension	High prevalence across all surveyed areas (approx. 30-40%)	NFHS-5 data reports hypertension prevalence at 33.5% in Varanasi
Top Therapy Trends	Preference for Amlodipine (35%), Telmisartan (25%), and Metoprolol (20%)	NFHS data on commonly prescribed therapies unavailable
Demographic Insights	Age groups most affected, gender distribution	Demographic breakdown from NFHS unavailable
Geographical Distribution	Variations in prevalence and treatment access	NFHS data on regional variations unavailable

4. 8 Interpretation of Findings:

Overall, these findings depict an intricate relation of multiple factors that determine the future of the antihypertensive therapy market in Varanasi. Therefore, proper interpretation of these findings will help healthcare providers, policymakers, and pharmacological companies to advance patient care, as well as market products that suit specific local conditions.

The analysis of main and secondary data collected for the research is discussed in detail in this chapter, including market characteristics, consumers' behaviour and relevant to the stakeholders in the antihypertensive therapy market in Varanasi. The discovery made from the study will help form the basis of the discussion and recommendation that has been made in other chapters of this dissertation.

Chapter 5: Discussion and Recommendation

5. 1 Discussion of Findings:

Market Dynamics and Consumer Behavior: Arguments from the market's dynamics provided the following insights about the antihypertensive therapy market in Varanasi. The mentioned preference for such brands as Amlodipine, Telmisartan, and Metoprolol is relevant pointing at the consumer concerns regarding the effectiveness, cost, and perceived effectiveness of the products offered. Tablet formulations continue to gain precedence and the trend towards single pill combinations SPC which is a global trend signifies consumer demands for ease and compliance.

Challenges and Opportunities: The challenges that were unveiled ended many of them involved logistic difficulties in the distribution of the products, stock out of certain brands more often than others, and poverty, which affected the ability of poor communities to afford the products. However, the above challenges act as a trigger for the pharmaceutical companies to /develop new and innovative ideas in formulation, strengthening distribution channels, and well-planned marketing strategies for better penetration.

Alignment with NFHS Data: A comparison with the NFHS data allowed for a broad understanding of hypertension status and its management in the Varanasi population. The conclusions highlighted the importance of delivering population-specific healthcare strategies that might take into account heterogeneity in the distribution of hypertension and the availability of AHTs.

5. 2 Recommendations:

Enhancing Product Accessibility:

Expand Distribution Networks: (Very important) Raise the stores' stock of popular brands in all the surveyed areas in Varanasi to address inequalities in drug provision.

Affordability Programs: Introduce new methods of pricing and patient support initiatives to improve the possibility of addressing the question of price sensitivity, especially in the segments of low-income populations.

Optimizing Therapy Effectiveness:

Promote Single-Pill Combinations (SPCs): Increase awareness among healthcare providers and consumers on the benefits of SPCs so that self-management of treatment can be enhanced as well as the Physician's effort of simplifying Medication regimens.

Patient Education: Design educational interventions that would enlighten people with hypertension on effective management of their condition, for instance, the need to engage in long-term therapy and changes in their lifestyle.

Strengthening Market Position:

Market Expansion Strategies: Identify ways of expanding into new regions within Varanasi and enhancing relations with health facilities, and pharmacies.

Differentiation through Innovation: Devote resources to develop new products, with new formulations which will suit the individual patient's requirement and choice.

Chapter 6: Conclusion and Future Directions

6.1 Summary of Findings:

This dissertation investigated the market dynamics and consumer behaviors surrounding antihypertensive therapy in Varanasi, utilizing a mixed-method research approach. Key findings from the study highlighted the dominance of brands like Amlodipine, Telmisartan, and Metoprolol in the local market. Consumer preferences favored tablet formulations and single-pill combinations (SPCs), driven by factors such as convenience, efficacy, and affordability. The analysis also revealed challenges related to distribution, brand availability, and economic barriers, alongside opportunities for innovation and market expansion.

6.2 Contributions to Knowledge:

This research contributes to the existing literature by providing empirical insights into the specific market dynamics of antihypertensive therapy in Varanasi. The study bridges gaps in

understanding consumer preferences, therapy trends, and market challenges, particularly within the context of a rapidly evolving pharmaceutical landscape in India.

6.3 Implications for Practice:

Healthcare Providers: The findings suggest opportunities for healthcare providers to optimize prescribing practices by aligning with local therapy trends and leveraging the efficacy profiles of preferred brands. Continued medical education can play a crucial role in enhancing provider knowledge and improving patient outcomes through evidence-based prescribing.

Pharmaceutical Companies: Pharmaceutical firms can utilize insights to tailor marketing strategies that highlight product differentiation, affordability initiatives, and distribution enhancements. Innovation in formulation and strategic partnerships with healthcare providers are recommended to strengthen market position and enhance patient access.

6.4 Recommendations Revisited:

Based on the findings, the following recommendations are reiterated to enhance the effectiveness of antihypertensive therapy in Varanasi:

Expand Distribution Networks: Ensure consistent availability of top-selling brands across all surveyed areas to improve accessibility.

Promote Patient Education: Develop comprehensive educational programs to empower patients with knowledge about hypertension management and treatment adherence.

Innovate in Product Development: Invest in research and development to introduce novel formulations and combination therapies that cater to local market preferences and healthcare needs.

6.5 Limitations and Future Research Directions:

Limitations:

The analysis faced some limitations like having a small sample size and possible survey response biases. Furthermore, the study is restricted to the analysis of Varanasi implying the

external validity of the research findings may not apply to other regions or areas where health care delivery systems differ significantly.

Future Research Directions:

Longitudinal Studies: Carry out a follow-up in several years and analyse the shift in the prescribing trends and results of the patients.

Health Economics Research: Identify how various treatment approaches and affordability measures affect the healthcare setting and patients.

Comparative Analysis: Extend comparison studies to more sites within India to explain regional differences in markets and healthcare.

6. 6 Conclusion:

Thus, the dissertation enumerates several critical aspects of the antihypertensive therapy market in Varanasi focusing on the identified research question and providing recommendations for healthcare stakeholders, policymakers and pharmaceutical companies. With the focus on existing issues and future possibilities, the stakeholders can improve the quality of hypertension management and healthcare provision in Varanasi and similar areas

Chapter 7: References

This dissertation could only be accomplished through conducting a comprehensive review of the literature and other scholarly productions that were useful in defining the study's procedures, results, and meetings. The following references highlight key sources consulted during the research process: The following references highlight key sources consulted during the research process:

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6. Survey Questionnaire

Appendix

Appendix A: Survey Questionnaire

A survey questionnaire that was employed in this study was developed in a way that would adequately capture extensive information on market aspects, consumer behaviour and characteristics, and views of healthcare providers concerning the antihypertensive treatment in Varanasi. It consisted of structured questions covering the following key areas: It consisted of structured questions covering the following key areas:

Demographic Information:

Respondents' age, gender, education level and their position in the supply chain (stockiest, chemists, and healthcare providers).

Brand Preferences and Market Share: Brand Preferences and Market Share:

Brands that patients prefer and the approximate percentage each customer will be using e. g., Amlodipine, Telmisartan, Metoprolol.

Market share and: the variables affecting the decision of consumers.

Therapy Trends:

The choice of attractions between the tablet and the capsule types of preparation.

Perceptions of SPCs and their factors by the respondents.

Pricing and Affordability:

Defining the average of best sellers and their prices (per 10 tablets).

Consumers' coverage about availability, price sensitivity, and other influencing elements of the monetary services.

Healthcare Provider Perspectives:

Issues of prescribing practices and compliance to the drug.

Opinions about the current state and expected forecast of the market share.

Appendix B: Interview Guide

The purpose of using the interview guide was to allow for more detailed discussions with some stakeholders, primarily those in the healthcare sector and members of the pharmaceutical industry. It included open-ended questions aimed at exploring the following themes: It included open-ended questions aimed at exploring the following themes:

Market Challenges and Opportunities:

Attitudes towards the opportunities and threats associated with market development in the management of antihypertensive therapy.

Outsourcing mostly allows for launching new products and services in the market.

Consumer Behavior and Preferences:

Information about customers' preferences of brands and types of formulation.

Assessing the determinants involving patient compliance and how this affects treatment and healing.

Regulatory and Policy Landscape:

Opinions on the policy factors that affect market entry and product circulation.

Recommendations for policy changes in relation to health care.