

Consumer Study: What do Swiss SMEs need to know about the Indonesian vitamin market to maximize their export opportunities for vitamin supplements?

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Bachelor of Science HES in International Business Management**

by

Czarina Nale ROBLES

Bachelor Project Mentor:
Nicolás DEPETRIS-CHAUVIN, PhD

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Haute école de gestion de Genève (HEG-GE)
International Business Management

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Executive Summary

This research study aimed to determine the underlying factors influencing the growing consumer demand for vitamin supplements in Indonesia with recommendations on what Swiss SMEs need to know in order to maximize their future opportunities in exporting their vitamin supplements in Indonesia.

To better understand Indonesia's vitamin supplement market, quantitative and qualitative research techniques are applied. Research participants are asked about their perceptions and expectations of products made in Switzerland as well as their vitamin consumption behaviours. This leads to identifying the characteristics of both non-vitamin users and vitamin users. The consumer analysis indicates that demographic characteristics such as gender, age, region of residence and educational attainment do not influence Indonesians' decision to consume vitamin supplements. Moreover, vitamin consumption is a personal preference based on an individual's knowledge about their diet, needs and lifestyle. Therefore, the results reveal that the growing consumption of vitamin supplements in Indonesia is due to the increasing purchasing power among the middle-class population and their increasing awareness of the benefits of vitamin supplements as a preventive health measure to overcome micronutrient deficiency and prevent certain diseases.

Due to the domestic companies' limited supply and incapacity to fulfil the rising consumer demand for vitamin supplements, Indonesia relies on the international market. Thus, it is an opportunity for Swiss SMEs to seize the promising opportunities of exporting vitamin supplements in Indonesia as consumers present interest in products made abroad, particularly in Switzerland. In addition, their willingness to consume Swiss-made vitamins despite their higher costs compared to its competitors is due to the perceived quality and outstanding reputation of Swiss products.

Swiss SMEs need to become customer-driven in terms of building lasting customer relationships. Indonesians' perceptions of Swiss-made products are the key to retaining the loyalty of current vitamin users. On the other hand, to attract non-vitamin users to consume vitamin supplements, given that the latter emphasises the factors that will influence them to change their perspectives towards their consumption.

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1. Introduction

Indonesia is the fastest growing and most resilient economy in Southeast Asia, with a Gross Domestic Product valued at USD 1.06 trillion in 2020 (World Bank, OECD 2020). As one of the emerging market economies, Indonesia has the fourth-largest population globally, with 273.5 million inhabitants in 2020 and a projected middle-class consumer of 135 million by 2030 (World Bank 2019). Although Indonesia has shown rapid economic growth in the preceding decades (World Bank, OECD 2020) and the local government's effort to achieve a Universal Health Coverage for all Indonesians, the health sector lacks coverage for growing health concerns such as malnutrition and unhealthy diets.

There are different fundamental drivers stimulating the demand for vitamin supplements in Indonesia, such as the purchasing power of the middle-class, unstable weather conditions due to climate change, and environmental issues. It also includes increasing awareness of preventive health measures to overcome micronutrient deficiency and prevent certain diseases.

The consumption of vitamin supplements regularly is set to remain, primarily since the COVID-19 pandemic has driven consumers to be more vigilant concerning their health, needing to maintain good health and fortify their immune systems. Hence, Indonesian consumers are now changing their habits and seeking to consume healthier sustenance, such as taking vitamin supplements and firmly believe in the stated products' health benefits.

Domestic companies have a limited supply and are incapable of fulfilling the rising customer demand for vitamin supplements. In 2020, Indonesia's imported vitamins had an estimated value of USD 192 million and were deemed the 17th largest importer of vitamin supplements in the world (OEC 2020a). Therefore, the country is relatively dependent on the international market. As a result, this industry has been attracting foreign interests in investment and collaboration with SMEs to fill the market gap.

This study aims to understand the demand for vitamin supplements in Indonesia. Furthermore, to determine the underlying factors influencing the growing consumer demand, this research study will assess Indonesians' perceptions of "Swissness" or

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“Switzerland” as a brand name, identify the determinants of their consumption of vitamins and the competition with other foreign vitamin providers in the local market.

Indeed, Switzerland plays an essential role in the international market of vitamins, particularly in Indonesia, due to its perceived value and as Switzerland is its third-largest importer of vitamin supplements. Also, the Free Trade Agreement between these two countries opens additional opportunities to export more vitamin and dietary supplements to Indonesia. Therefore, this research study aims to inform Swiss SMEs about their future opportunities in the Indonesian vitamin market.

The remaining sections of this research study are structured as follows. The subsequent section presents a literature review with regards to the vitamin industry, the market opportunities, and challenges for Swiss SMEs. It will be followed by the methodology, which introduces the research problems, hypotheses, and procedures for collecting and analysing primary data. This study continues by analysing Indonesians’ perception of Switzerland by applying a projection technique called the free word association task. Then, classify their expectations of Swiss-made products based on frequency counts and perform consumer analysis using excel and an integrated statistical software called Stata. It is followed by the essential findings and recommendations for Swiss SMEs. The final section provides the general conclusion, including some of this study’s limitations and areas for future research.

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2. Literature Review

According to (OEC 2020b)' data in 2020, « Vitamins » rank 329th among the most traded products in the world, with a total trade value of CHF 8.90B. The trade in vitamins represents 0.055% of the total world trade. In terms of exports, the leading countries that export vitamins globally are China (CHF 3.27B), Germany (CHF 1B), Switzerland (CHF 933M) and the United States (CHF 721.01M). In comparison, the top importers are the United States (CHF 1.39B), Germany (CHF 685M), the Netherlands (CHF 674M) and China (CHF 359).

2.1 Vitamin Industry in Indonesia

The vitamin supplements market across Indonesia has observed a positive trend and is forecasted to continue its surge at a compound annual growth rate of 11% and hit CHF 1.6 billion in 2026 (Euromonitor International 2021a).

In connection with trends and developments in the Indonesian market, several factors influence the increasing importance of vitamin supplement consumption among consumers on a daily basis. For this circumstance, factors include the poor nutritional status of its citizens, climate change, growing middle-class and awareness to take better care of themselves. In addition, supplements are perceived not only as a treatment but also as chronic disease prevention (Swiss Business Hub Indonesia 2021).

In 2021, (Euromonitor International 2021a)'s study showed that the COVID-19 pandemic accelerates vitamin consumption. The most consumed supplements are multivitamins, vitamin C and vitamin B, with a respective value of sales worth IDR 7.9B, IDR 4.3B, and IDR 1.3B. Appendix 1 shows that the sales of the mentioned vitamin supplement are forecasted to grow by 2026. Furthermore, consumers purchase them primarily in pharmacies. On the national level, Appendix 2 presents that Kalbe Farma Tbk PT dominates the vitamin supplements market in Indonesia. At the same time, Herbalife Nutrition and Bayer are the leading players at the international level.

With regard to imports, Indonesia brings in vitamins from China (45%), Switzerland (10.4%), Singapore (8.81%), and Germany (6.94%) with a value of CHF 72.54M, CHF 16.67M, CHF 14.16M and CHF 11.17M, respectively (OEC 2019a).

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In 2020, Indonesia ranked 73rd in terms of ease of doing business (Eddymurthy, Adhijoso 2021). Foreign companies such as Swiss SMEs must be mindful of cultural norms and business etiquettes as well as to adhere with Indonesia's laws and regulations to successfully enter the local market.

2.2 Vitamin Industry in Switzerland

According to (Euromonitor International 2021b), the market data for the sales of vitamin supplements in Switzerland accounted for CHF 252.5 million in 2021. Due to the growing health consciousness among Swiss consumers, the sales of the vitamin supplements category foresee to grow by 2.3% or CHF 257.1 million in 2023 and CHF 261.3 million in 2026 compared to the actual value of 1.8%. Among the different Swiss brands, Bayer AG dominates in the vitamin C segment, the most sought-after vitamin variety by Swiss consumers in 2021. The latter's value increased by 9% (CHF 13.3 million), followed by vitamin D. In Indonesia, Bayer Indonesia is also the leading vitamin brand principally due to the high reputation of Redoxon, followed by Berocca and Supradyn (Euromonitor International 2021a).

However, the demand for multivitamins expects to grow among consumers as it constitutes many different vitamins in a single pill. It is also the most convenient type and popular among consumers, given that it depicts good value for money and prevents consumers from taking different tablets simultaneously.

With regard to regulation, food supplements in Switzerland are controlled by the Regulations on Special Foods, which elaborates the allowed number of dosages and authorized sources of vitamins and minerals. In addition, the Swiss Institute for Therapeutic Products acts as the regulating authority for prescription and over-the-counter medicines in the country. Based on Swissmedic's classification, the vitamin supplements segment is either a medicine if it has been proven to have a clinical effect or a food supplement if it constitutes a low dosage below the recommended daily allowance (Euromonitor International 2021b).

Therefore, unlike any medicines produced by the pharmaceutical industries, vitamins and health supplements are not required to be registered. According to the (Federal

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Office for Customs and Border Security 2022)’s statement in Appendix 3, this circumstance influences the fact that information about different Swiss vitamin companies cannot be disclosed to the public due to data protection purposes.

In terms of exports, the Observatory of Economic Complexity’s data in 2019 states that Switzerland is the third leading exporter of vitamins worldwide with a proportion of 9.43% or a trade value of CHF 745M after China (34.5%) and Germany (11.7%) (OEC 2019a). Furthermore, Switzerland had continuously increased its exports of vitamins to Indonesia with a proportion of 2.24% or CHF 16.67M (OEC 2019b) in 2019 compared to 0.82% or CHF 7.11M in 2010 (OEC 2010). The country’s main exports to Indonesia include gold, packaged medicaments, gas turbines and vitamins at a respective proportion of 10,4%, 7.76%, 6.9% and 2.83% (OEC 2019c).

2.3 Market Opportunities

In December 2018, Indonesia signed a Comprehensive Economic Partnership Agreement between the EFTA States, including Switzerland (Republic of Indonesia, Swiss Confederation, Kingdom of Norway 2018). Once the agreement came into force, Switzerland and Indonesia profited from these bilateral economic relations. Consequently, the agreement ended the customs tariff of no more than 98% of Swiss exports, which the agricultural, chemical, and pharmaceutical sectors are the most expected to benefit from this agreement (SECO 2020).

As a result, the Free Trade Agreement improves the market access and legal certainty for trade in goods and services (Federal Department of Economic Affairs, Education and Research 2018). It will also introduce new export possibilities for Switzerland, considering that Indonesia’s exorbitant tariffs will be eliminated over twelve years. Thus, this circumstance will ensure a competitive advantage over Swiss firms’ rivals who are yet to sign the agreement with Indonesia or are still in the negotiation phase. Also, the Free Trade Agreement offers numerous possibilities for Swiss companies to align their supply chain with the Indonesian market (EY 2021).

Hence, this agreement presupposes that Swiss SMEs will be able to save approximately CHF 25M in tariffs (SECO 2020). According to the study published by Switzerland Global Enterprise about the Indonesian market, Switzerland ranked 9th as Indonesia's foremost

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export partner in 2020, with a value of CHF2.3B. On the other hand, it was in 10th position as Indonesia's leading import partner for the same year, with a value of CHF 0.67B (Federal Department of Foreign Affairs FDFA 2021).

According to the survey research results, additional market opportunities include Indonesians' likelihood of purchasing vitamin supplements regardless of their country of provenance. The name "Switzerland" is considered a brand associated with high quality. Also, Indonesians are willing to pay for Swiss products despite the high mark-up prices due to Switzerland's perceived value.

2.4 Market Challenges

Indonesia is the fastest-growing emerging economy in Southeast Asia and a promising future market for Swiss SMEs. Nevertheless, despite the extensive opportunities, Swiss SMEs could face numerous barriers to navigating Indonesia's vitamin supplements market.

The revised Halal regulation in Indonesia, issued in June 2021, includes more extensive information about its issuance and implementation. The Halal certification that came into effect in 2014 is proclaimed mandatory for goods and services, implemented by the Indonesian Halal Certification Agency (BPJPH).

Unfamiliarity with Swiss products and their higher costs could prevent some price-sensitive Indonesian consumers from purchasing vitamin supplements made in Switzerland. As a result, they would likely shift their preferences and consider alternative supplements made by local and foreign companies in competition in the local market.

The Head of Agency of Drug and Food Control Republic of Indonesia Number HK.00.05.41.1381 or BPOM regulates the registration procedures for vitamin supplements in Indonesia. Therefore, international companies intending to distribute vitamin supplement products in Indonesia must comply with local regulations, such as obtaining a distribution permit from the mentioned regulatory body.

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3. Methodology

The objective of this section is to describe the research questions, hypotheses and methods applied to this research study.

3.1 Research Questions

Question 1 (Q₁): How is Switzerland perceived as a country, and what are Indonesians' expectations of Swiss-made products?

Question 2 (Q₂): What are the characteristics of vitamin consumers (non-users and users) in Indonesia?

Question 3 (Q₃): How do demographic characteristics such as age, gender, region of residence, and educational attainment influence Indonesians' decisions to consume vitamin supplements?

Question 4 (Q₄): How much are Indonesians more (or less) willing to pay (in percentage terms) for equivalent vitamin supplements made in Switzerland compared to other leading foreign competitors in the Indonesian market?

3.2 Research Hypotheses

Hypothesis 1 (H₁): Indonesians' perceived value and expectations of Switzerland influence their decision to purchase Swiss-made products.

Hypothesis 2 (H₂): The number of vitamin users in Indonesia is higher than non-vitamin users.

Hypothesis 3 (H₀): Demographic characteristics such as age, gender, region of residence and educational attainment have no effect on Indonesians' decisions to consume vitamin supplements.

Hypothesis 4 (H₀): The price for equivalent vitamin supplements made in Switzerland compared to other leading foreign competitors has no effect on Indonesians' decisions to purchase vitamin supplements.

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3.3 Research Methods

In this research study, quantitative and qualitative research techniques are applied. To better understand the market opportunities, it is essential to take into account the consumers' perspectives or the demand side about their consumption behaviours towards vitamin supplements. The data collection method in relation to consumers' demand will be explained further in the subsequent sections.

3.3.1 Participants

This research study is intended for middle-class individuals residing in Indonesia, regardless of nationality. Therefore, it is essential to classify the participants according to their age, gender, region of residence and educational attainment to explore the demographic characteristics associated with an individual consuming and not consuming vitamins. Also, how they perceive Switzerland and their expectations of Swiss-made products. After the data cleaning process, this research study registered 120 participants. This point will be discussed in more detail in section 3.3.5.

3.3.2 Questionnaire

In this study, primary data are collected using a self-administered questionnaire designed for individuals who are vitamin and non-vitamin users residing in Indonesia. In addition, this cross-sectional survey is conducted to evaluate the discrepancies between the mentioned groups.

The questionnaire is administered electronically using the software Qualtrics XM. According to Tom Wells, survey completions using mobile devices have been increasing (Wells 2015) and could be due to the fact that mobile usage has become more prevalent. Therefore, the format of this survey is attentively designed to be mobile-friendly.

Qualtrics offer a powerful feature that authorises users to create a single survey in multiple languages. In this questionnaire, each respondent has the option to choose between English (see Appendix 4) and Bahasa Indonesia (see Appendix 5) and consists of 24 questions, including a combination of open-ended and closed-ended questions. As the demand side of this research study is intended for international participants, a mixed

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translation technique is applied wherein the questions are translated using an online tool and then verified and proofread by a native Bahasa Indonesia speaker. It allows the participants to understand the questions better, providing more accurate responses.

A pilot test is carried out on a group of 5 individuals prior to releasing the questionnaire to assure the representativeness and suitability of the questions. This group assessed the length of the survey and layout, clarity of instructions, suggested necessary amendments to remediate ambiguous questions and if the questionnaire contents made sense (Bell 2005).

This questionnaire collects variables such as opinion, behaviour and attribute (Dillman 2011). All types of questions are subject to response requirements and validation. As a force response is enabled, an asterisk icon appears in the top right corner of each question to signal that they are mandatory in order to proceed to the next page. Furthermore, the comment field "Other" in some questions is marked as a mandatory field to prevent limiting responses to a predetermined list of options. This approach allowed participants the freedom to provide unforeseen responses.

The survey starts with two open-ended questions to discover what comes into the participants' minds when they hear "Switzerland" and their expectations of Swiss-made products. Although conducting such questions provides an opportunity to gather deeper insights and explore new aspects from the respondents, a minimal number of open questions are involved in preventing non-response and irrelevant data.

A series of close-ended questions are also taken into consideration:

In order to collect data about behaviours and attributes, category questions are considered as there are specific questions meant for two categories, particularly for vitamin and non-vitamin users. The questions are arranged in a logical order to easily identify the response category that aligns with each participant's statements. The rest of the categories will be discussed individually thereafter.

Then, most of the questions are dominated by multiple-choice questions in different formats. Respondents are instructed to answer with either strictly single-answer or multiple responses (check-all-that-apply).

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Moreover, rating questions such as the five-point-Likert-style rating scale are used to evaluate the participants' opinions on their general lifestyle and frequency of vitamin usage. Also, to measure how much they are willing to pay for Swiss-made vitamins compared with the other three leading exporting countries. Negative and positive statements and percentages are included to ensure that participants attentively read the questions and carefully select their answers from a set of alternatives (Dillman 2011).

To have an overview, the list below describes the six sections of the survey. Each section has its importance in order to understand in depth the demand side of the vitamin supplement market in Indonesia:

1. Perception of Switzerland

This section aims to discover how Switzerland is perceived through the eyes of individuals living in Indonesia. This part consists of two open-ended questions in which participants are asked about their uppermost thought when they hear "Switzerland" and their expectations of Swiss-made products. A maximum of three answers are required for both questions. For this purpose, a free word association task and frequency counts are applied to investigate Indonesians' understanding and knowledge of Switzerland in a general manner.

2. Purchasing behaviour towards Swiss-made vitamins

This section contains four multiple-choice questions. The purpose is to determine if a participant has already purchased any Swiss-made vitamin supplements and their behaviour towards the mentioned supplements. This section distinguishes two types of users: vitamin users specify the characteristics of vitamin supplements it consumes. In contrast, non-vitamin users are asked about what has prevented them from consuming the said products. Also, users and non-users are asked about the factors they would consider when buying vitamins made in Switzerland.

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3. Consumer lifestyle

This part aims to have a general overview of the participants' overall lifestyles and assess them individually by responding to four statements using a five-point Likert scale (strongly disagree, somewhat disagree, neither agree nor disagree, somewhat agree and strongly agree). The four statements determine if the participants' lifestyles are presumed to influence their decisions to take or not take vitamin supplements.

4. Users of vitamin supplements

Vitamin users are confronted with ten questions in different formats. This section intends to learn about the attributes of the users' vitamin supplements, including the type, form, frequency of intake, sources of information, preferred distribution channels and other attributes that they consider the most important when purchasing a vitamin. Moreover, respondents are asked how much more (or less) they are willing to pay for equivalent vitamin supplements made in Switzerland compared to Indonesia, China and Singapore using a Likert scale ranging from -50% to +50%. As mentioned in the literature review section beforehand, the three countries are selected because Indonesia imports vitamins from these countries aside from Switzerland. Also, this section, along with the next one, provides essential information to Swiss SMEs to identify the potential market opportunity for exporting their vitamin supplements to Indonesia.

5. Non-users of vitamin supplements

Two questions are addressed to this type of user. The purpose is to acknowledge the factors that prevent non-vitamin users from taking vitamin supplements and identify the circumstances they would consume the mentioned products.

6. Demographic questions

Demographic data is indispensable as it provides background information about the participants. Only two conditions must be fulfilled in order to participate in this study: currently residing in Indonesia or Indonesians living in Switzerland. Demographic factors include the participants' age, gender, region of residence and educational attainment.

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3.3.3 Data Cleansing

In order to improve the quality of the dataset, a data cleaning process is involved wherein variables are filtered and irrelevant data are removed. This survey counted 163 observations.

As part of the data cleaning process, responses with a progress rate of below 100% are discarded. Among the 129 responses, 9 were omitted in the sample as those are the “previews” during the pilot test. Therefore, a total of 120 research participants ($n = 120$) are registered and their responses are considered for the data analysis. The questionnaire is then distributed through two modes of administration in which 67.50% of research participants completed the survey through email invitations via Qualtrics while the other 32.50% through an anonymous link.

In terms of user language, 41 participants at a respective proportion of 34.17% are more comfortable with responding in Bahasa Indonesia. For this reason, the said responses are translated into English.

Furthermore, in order to detect fraud and to ensure a high-quality dataset, Qualtrics include a reCAPTCHA score per respondent in which a score of fewer than 0,4 signals that a respondent is a bot and greater than or equal to 0,5 is a human (Qualtrics 2022). The average reCAPTCHA score per participant of this questionnaire is 0,91277.

3.3.4 Sampling Method

For this research, various sampling techniques are involved in different stages to obtain a representative sample. Both probability and non-probability samples are applied and will be discussed separately.

a. Stratified random sampling (probability sample)

Public Universities in Indonesia are government-funded and considered self-managed institutions, while Private Universities are owned, funded, and managed by a private establishment. According to the Statistic report from the Directorate General of Higher Education in 2020 (PDDikti 2020), 63 Public Universities and 127 Private Universities are all over the country (Wikipedia 2022). The table below shows an overview of the proportion of private and public universities per region.

Table 1: Respondents' distribution among private and public universities per region

| Geographical Unit | Provinces | Private universities | Private in % | Public universities | Public in % |
|----------------------|---|----------------------|--------------|---------------------|-------------|
| Java | Banten, Jakarta, West Java, Central Java, S.R. | 110 | 87% | 24 | 38% |
| | Yogyakarta, East Java | | | | |
| Kalimantan | West Kalimantan, Central Kalimantan, North | 0 | 0% | 5 | 8% |
| | Kalimantan, East Kalimantan, South Kalimantan | | | | |
| Maluku Islands | North Maluku, Province of Maluku | 0 | 0% | 2 | 3% |
| Lesser Sunda Islands | Bali, West Nusa Tenggara, East Nusa Tenggara | 4 | 3% | 5 | 8% |
| Western New Guinea | West Papua, Province of Papua | 1 | 1% | 3 | 5% |
| Sulawesi | North Sulawesi, Gorontalo, Central Sulawesi, West | 6 | 5% | 9 | 14% |
| | Sulawesi, South Sulawesi, Southeast Sulawesi | | | | |
| Sumatra | Aceh, North Sumatra, West Sumatra, Riau, Riau | 6 | 5% | 15 | 24% |
| | Islands, Jambi, Bengkulu, South Sumatra, Bangka | | | | |
| | Belitung Islands, Lampung | | | | |
| | | 127 | 100% | 63 | 100% |

Source: Czarina Nale Robles (2022)

The sample size is designed according to the calculated proportion. As a result, 48 universities are selected to participate in this study. The list of universities is ranked in alphabetical order, and every fourth university is selected to get an unbiased selection.

Moreover, to diversify and reach the desired number of participants, the questionnaire is distributed via email and shareable links to different channels such as social media (Facebook and Instagram), friends and acquaintances in Geneva and Indonesia. Also, to randomly selected organizations/associations throughout Indonesia (Swiss Embassy in Indonesia, Embassy of the Republic of the Philippines in Jakarta, Indonesian Student Association in Switzerland, and Liechtenstein (PPI) and Yoga clubs).

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b. Self-selection sampling (non-probability sample)

The questionnaire is shared via Qualtrics, Outlook (email), and shareable survey links. At the beginning of the survey, consent is asked from the selected participants in the sample should they desire to participate in the research, and their identity remains anonymous. Aside from being a resident in Indonesia, no further constraints are established to participate in this study. Therefore, data are collected from those who responded.

3.3.5 Demographics

Demographic data is segmented into four categories. First, it includes the research participants' characteristics such as age range, gender, region of residence and educational attainment. These independent variables are fundamental to determining whether the research participants are considered a representative sample of the target population for generalization purposes (Salkind 2010).

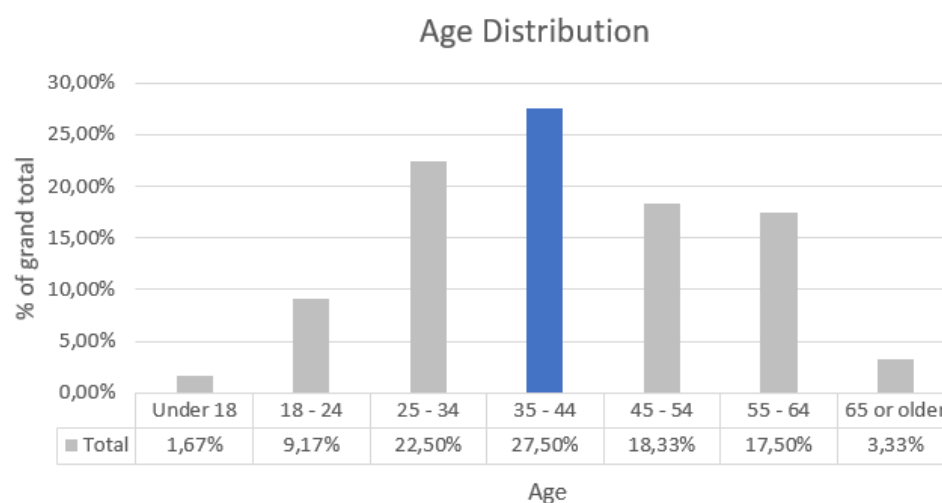
In place of asking the participants to state their exact age, specific age categories are formed. Furthermore, participants are provided with the option to identify themselves within a predetermined range in this category. The sampling frame consists entirely of selected faculty members of Private and Public Universities in Indonesia to represent the middle-class population due to their income and individuals from diverse organisations, including student associations and international organisations.

Based on (Worldometers.info 2022)'s report, the population's median age in Indonesia is estimated at 29.7 years, with a life expectancy at birth of 74.6 years for females and 70.1 years for males. In terms of social media statistics in 2022, approximately 68.9% of Indonesia are social media users (DataReportal 2022), and around 73% of the Indonesian population have access to the internet (antaranews.com 2021).

The graph below illustrates the various age groups. It indicates that the most representative individuals who participated in this study are from the age groups of 35-44 years old, followed by the age group of 25-34 and 45-54, with a respective proportion of 27.50%, 22.50% and 18.33%. Thus, the median age group is 35-44.

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Figure 1: Age distribution of both non-users and users of vitamin supplements

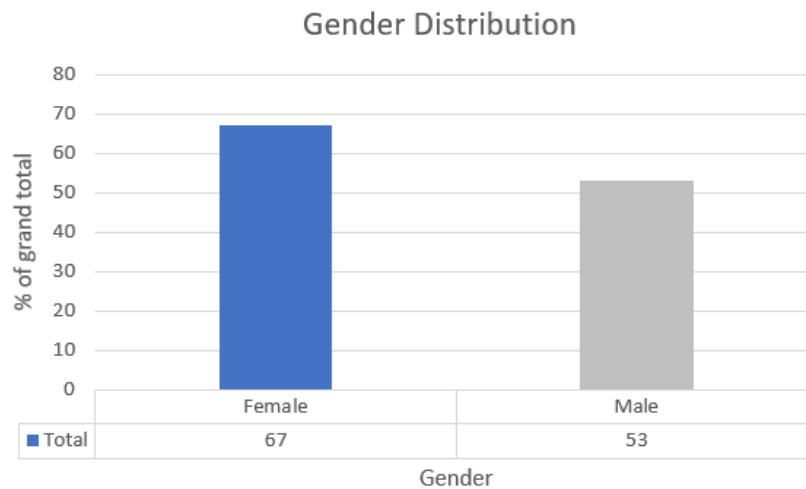


The graph shows that the younger age group (1,67%) or those who are under 18 years old are underrepresented compared to the working-age population (Jakarta Globe 2021) from 18-64 (95%) as the latter has a higher tendency to respond to a survey.

According to (Sandberg 2016), the tendency to engage in a survey increase with age. However, the proportion of internet users among the elderly population aged 50 years and older is relatively low (antaranews.com 2021) compared to the previous generations. Consequently, the graph shows a decreasing response rate with the age groups after the median age.

The mentioned circumstances could result from self-selection sampling bias, considering that the participants self-selected themselves to participate in the study. Also, the highest percentage of the survey invitation is distributed to members of numerous University faculties all over the country. Thus, the participation of the said segment has significantly increased the response rate.

Figure 2: Gender distribution of both non-users and users of vitamin supplements



Another essential aspect to take into account is the gender of the participants. This parameter provides insight if gender-related difference plays a role as it reveals disparity in opinions and how it influences the vitamin consumption behaviour of an individual. According to the data published by the World Bank in 2020, the male population in Indonesia (50.3%) is higher than the percentage of the female population.

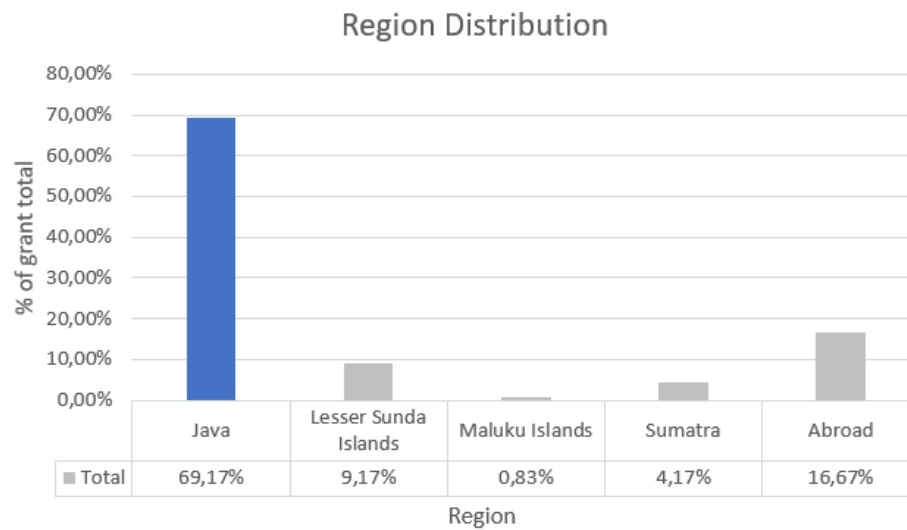
However, a slight gender imbalance is perceived among the 120 participants, as 55.83% reported their gender as a female and 44.17% as male, although the research study is gender inclusive.

Furthermore, females are most likely to engage in online activities, thus, more willing to participate in a research study than males (Smith 2008). Hence, a gender disparity of 11.66% exists between the two genders in the studied population.

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Figure 3: Region distribution of non-users and users of vitamin supplements



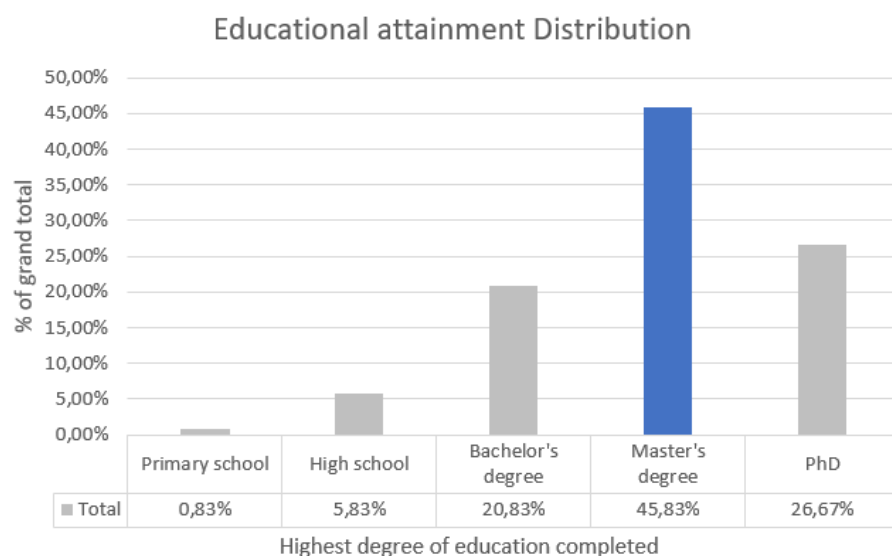
Indonesia is composed of seven geographical regions. The region distribution above shows the residence of the participants. Three regions, namely Kalimantan, Western New Guinea and Sulawesi, are excluded from this study due to the non-response rate. The graph shows that 69.17% of the respondents live in Java.

Different factors influence the perceived high-response rate in this region, including the fact that Java is the capital city of Indonesia and is home to 145 million individuals, depicting 56.7% of the country's population (WorldAtlas 2018). Also, a high number of email and link invitations are distributed to this region because it is home to a considerable proportion of private and public universities as well as international and local companies.

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Figure 4: Educational attainment distribution of non-users and users of vitamin supplements



Lastly, the question concerning education attainment is required to discern the highest level of education a participant has attained. The education distribution graph depicts that 45.83% of the sample are holders of a Master's degree, followed by PhD/Doctorate and Bachelor's degree, with a respective proportion of 26.67% and 20.83%. As this research study focuses solely on the middle-class population, thus, most of the participants in the sample had attained tertiary education.

Indonesia's middle-income population accounts for 20% of the total population and has been significantly rising, contrary to the other groups (World Bank 2019). As a result, the social classes in this country are defined either by their incomes or consumption levels. To illustrate, Appendix 6 shows that the middle class consists of individuals with less than a 10% chance of being poor or vulnerable, with a per capita consumption between CHF 7.46 to CHF 36.58 per day (World Bank 2019).

3.3.6 Data Analysis of Indonesians' perceptions of Switzerland

Both non-numerical (qualitative) and numerical (quantitative) data are analysed using various tools and methods as part of the research process.

First, exploratory research is performed to gather information about the participants' perception of Switzerland. Then, their viewpoints are analysed using a projective technique called the free word association task. In order to measure the proportion of common and rare evoked words shared among all the participants, diversity, rarity and INCEV indexes are calculated.

3.3.6.1 Free Word Association Task

What comes to your mind when you hear "Switzerland"? To investigate the viewpoints and knowledge of Indonesians, both vitamin users and non-users, towards Switzerland and its products, the theory of social representations are taken into account in this study. Participants had to mention their insights into the provided three entry boxes, numbered from 1 to 3, considering their first input as the most important.

The Free word association task is one of the most frequently applied projective techniques. It *"encourages respondents to reveal their unconscious feelings and attitudes without being aware that they are doing so"* (Donoghue 2000). Serge Moscovici initially developed this framework of collective representations in the 1960s (Mouret 2012).

Jodelet highlighted this concept as *"a form of knowledge socially elaborated and shared, having a practical and constructive vision of a common reality to a social group"* (Jodelet 1991, p.36).

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According to (Moscovici 2015), the form of knowledge is classified into three different dimensions, namely the attitude, the information, and the field of representation:

Figure 5: Three-dimensional representation of the knowledge from the social core theory (Moscovici, 1961)

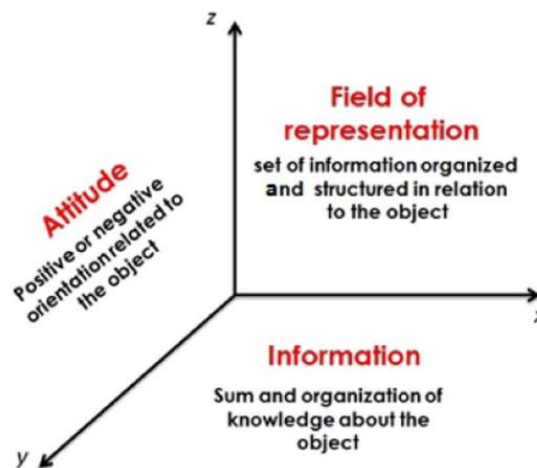


Fig. 1. Three-dimensional representation of the knowledge emanated from the social representations theory (Moscovici, 1961).

Several methods have been developed to explore the content of the theory of social representations. One of them is called the central core theory, proposed by Jean-Claude Abric in 1976. According to (Rodrigues et al. 2017), a central core is an imperative element that defines the significance and organization of representation.

In order to determine the central core, contrasting elements, as well as the two peripheral areas, the present study follows the prototypical approach developed by (Verges 1992), which analyses not only the frequency but also the rank of evocation of the elements given by the participants. Therefore, the following procedures have to be carried out in order to define the social representation of Indonesian's perception of Switzerland.

a. Translating, lemmatization and categorization

As 34.17% of the respondents who participated in this study have chosen Bahasa Indonesia as their preferred language, the initial step before conducting any analysis includes translating the evoked words from Bahasa Indonesia to English. Therefore, it is essential to verify any typing or spelling mistakes provided by all

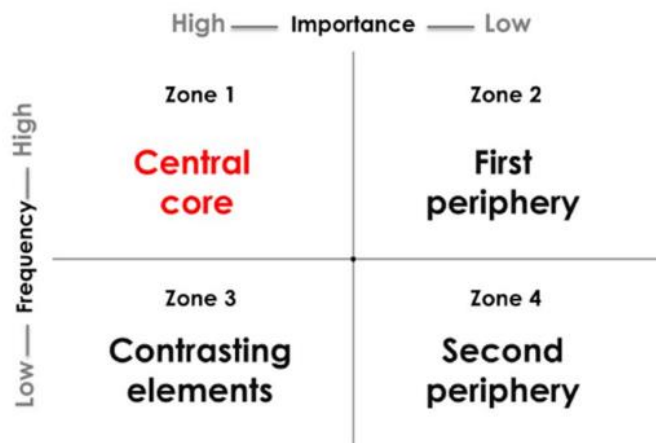
the participants before proceeding to the next phase – lemmatization. This second phase aims to remove inflectional endings only and convert the words into their base forms (Cambridge University Press 2009).

The final step is categorization, in which the evoked words are carefully analyzed, and those that share a common root word are combined in order to form categories through a process called triangulation (Abric 2005). The words with a higher frequency of elicitation are used to form a group. In contrast, those with a low frequency of elicitation remained as independent words instead of being discarded from the analysis.

b. Frequency-importance analysis of the social representation

The table of Frequency-importance analysis below created by (Abric 2003) highlighted that social representation can be grouped into four different zones by “crossing the importance of the evoked words with their frequency of elicitation” (Rodrigues et al. 2017):

Figure 6: Frequency-Importance analysis showing the four zones in a structural approach of the social representation (adapted from Abric, 2003)



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In terms of analysis, it is crucial to evaluate the frequency of occurrence and the average importance of the category and determine the cut-off values. To emphasize the cut-off values for both frequency and importance, categories with a frequency (or importance) above the cut-off points are considered high frequency (or high importance). In contrast, those lower than the cut-off points are regarded as low frequency (or low importance) (Rodrigues et al. 2015). Therefore, the four zones are classified as follows:

Zone 1 - central core: high frequency of elicitation and high importance

Zone 2 - first periphery: high frequency of elicitation and low importance

Zone 3 - contrasting elements: low frequency of elicitation and high importance

Zone 4 - second periphery: low frequency of elicitation and low importance

Also, in this study, the order of elicitation follows different scales. First, as mentioned, the evoked words are assigned a point based on their position in the provided entry boxes in the questionnaire. Then, they are enumerated according to their implication, from one as the most important thought to three as the less important.

In terms of the linear scale and logarithmic scale, evoked words are also assigned a point based on their position:

Table 2: Order of elicitation

| | ORDER OF ELICITATION | | |
|-------------------|-----------------------------|----------|---------|
| Position | 1st | 2nd | 3rd |
| Linear scale | 3 points | 2 points | 1 point |
| Logarithmic scale | 9 points | 3 points | 1 point |

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c. Diversity and rarity index of representation elements

The diversity and rarity indices are calculated in order to measure the proportion of common and rare evoked words shared among all the participants. According to (Rodrigues et al. 2015), (Roquette, Flament 2022) calculates these two indices as the following:

Table 3: Formulas of Diversity and Rarity Indexes

| INDEX | FORMULA | EXPLANATION |
|-----------|---|--|
| Diversity | $\frac{T}{N}$ <p>T (type) = number of different evoked words prior lemmatization and categorization</p> <p>N = total evoked words</p> | <p>The smaller the index, the smaller the diversity.</p> <p>The maximum diversity is equal to 1.</p> |
| Rarity | $\frac{H}{T}$ <p>H (Hapax) = proportion of words cited only once</p> | |

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d. Centrality index of central core elements (INCEV)

INCEV is calculated after identifying the four representation zones (Rodrigues et al. 2015). The table below includes the calculation of the centrality index of central core elements defined by (Wachelke 2009):

Table 4: Formula of INCEV index

| | | |
|-------|--|--|
| INCEV | $\frac{\text{Frequency of occurrence of each core category}}{\text{total number of participants}}$ | Index varies between 1 and 0. 1 = element is more central |
|-------|--|--|

3.3.7 Data Analysis on expectations of Swiss-made products

Research participants are also asked to share their expectations of Swiss-made products. After grouping semantically and thematically related words into categories, the evoked inputs are shown on a graph and ordered by frequency counts, from highest to lowest.

3.3.8 Consumer Analysis data

In terms of numerical data, pivot tables are performed using MS Excel. This tool allows to visualize informative summaries of the collected data and helps identify recurring patterns among the participants.

Moreover, statistical software STATA is also used to analyze the collected data from the questionnaire. First, to describe and draw conclusions from the findings, the data are summarized using descriptive statistics such as frequency distribution, central tendency and variability. Then, inferential statistics are applied to test the research study's hypotheses and significance level. For this context, the list below describes the used comparison tests to compare different variables:

- Pearson's chi-squared test of independence to test the relationship of two categorical variables.
- Independent T-tests to compare the means of two groups (non-users and users of vitamin supplements according to gender: 1=female & 0=male and region: 1=Java & 0=other regions).
- One-way ANOVA to compare more than two groups (non-users and users of vitamin supplements according to age ranges: 1 to 5 and education attainment: 1 to 5).
- Probit regression model to analyse the determinants of vitamin consumption based on demographic factors, which are the independent variables in this case. The dependent variable is 1=non-users and 0=users.
- One-sample T-tests to compare one population to a standard value. The aim is to determine whether Indonesians are willing to pay more or less for a vitamin supplement made locally in China and Singapore for an equivalent vitamin made in Switzerland. The percentage scale is from -50 (less) to +50 (more).

The gathered demographic data could be classified as categorical data in which a participant falls into one category. For this context, different statistical tests are performed to test hypotheses regarding the distribution of observations in different categories (The Open University 2022).

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The objective is to observe that there is no significant difference exists between vitamin consumption (non-users=1 and users=0) with the following independent variables.

- Age: under 24, [25-34], [35-44], [45-54] and 55 & above in which under 24 includes [under 18 and 18-24] and 55 & above includes [55-64 and 65 or older] with a respective variable from 1 to 5
- Gender: female=1 and male=0
- Education: Primary school=1, High school=2, Bachelor's degree=3, Master's degree=4, PhD=5
- Region: Java=1 or "other regions "=0 in which regions within Java including Switzerland are combined

The probability value denoted p-value determines the statistical significance of a finding. If the P-value $\leq \alpha$ where $\alpha=0.05$, then the means are statistically significant and reject the null hypothesis. Otherwise, if the P-value $> \alpha$, the means are not statistically significant, and there is not enough evidence to reject the null hypothesis.

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4. Analysis

After comprehending the purpose of this research study and how it is conducted, this section contains a thorough analysis of the collected primary data from the questionnaire. The first section evaluates Indonesians' perceptions of Switzerland and their expectations of Swiss-made products, followed by the consumer analysis examining the characteristics of non-users and users of vitamin supplements. Then, it is succeeded by analyzing the demographic determinants of vitamin consumption and the research participants' willingness to pay more or less for vitamin supplements produced in Indonesia, China and Singapore for an equivalent vitamin made in Switzerland.

4.1 Perceptions of Switzerland

For this context, an exploratory study is performed by utilising the free word association procedure and the central core theory to define the social representation of Indonesians, both non-vitamin and vitamin users, with regards to how they perceive Switzerland as a country. This projective technique is based on "Eating flowers? Exploring attitudes and consumers' representation of edible flowers" (Rodrigues et al. 2017) and "Structural approach of social representation: Application to the concept of wine minerality in experts and consumers" (Rodrigues et al. 2015).

Moreover, diversity and rarity indexes are calculated in order to determine the degree of social sharing among the participants about the subject. Finally, the centrality index of central core elements or INCEV is also an important aspect to consider.

In terms of practical purposes, the outcomes can provide valuable contributions to developing marketing strategies to shift the prospective consumer into a user of vitamin supplements. Also, the last part of this section includes the expectations of Indonesians on goods made in Switzerland.

4.1.1 Free Word Association Task

The participants are asked to enumerate three insights to the question, « What comes to your mind when you hear the word «Switzerland ?». After performing the translation from Bahasa Indonesia to English, the corpus produced by all the participants has

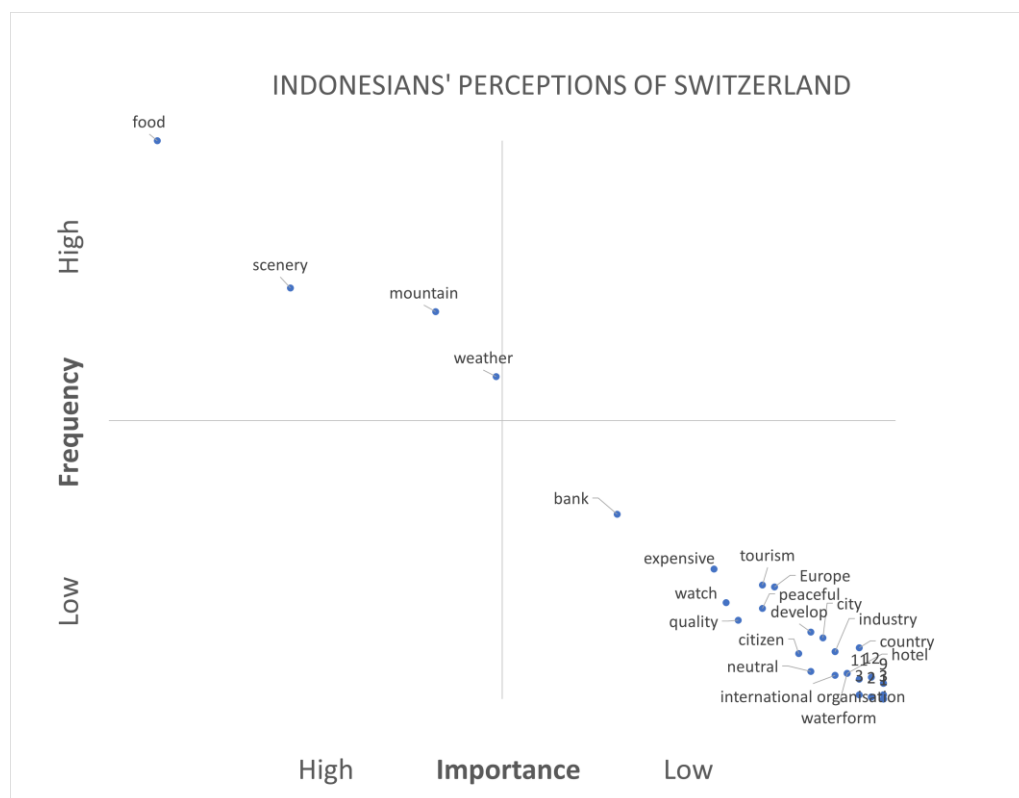
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undergone the triangulation process wherein the cited words are lemmatized and categorized (see Appendix 7).

As a result, 532 words are gathered from all the participants. However, after the lemmatization process, the evoked words are adjusted to 360. The associated words are then grouped into different categories and, in this case, are equivalent to 42. However, the words that can not be put into a defined category and are mentioned only once in this study are discarded from the analysis (see Appendix 8).

The frequency-importance analysis matrix shows the four representation zones in a structural approach to social representation. The findings of the prototypical analysis show that all the participants have distinct representations of Switzerland.

Figure 7: Indonesians' perceptions of Switzerland



Source: Czarina Nale Robles (2022)

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The top left quadrant represents the categories or dimensions with high frequency and importance, corresponding to the central core zone of the social representations. It is characterized by four dimensions: food, *scenery*, *mountain*, and *weather*.

Subsequently, the centrality of the core elements is estimated with the INCEV index. Among the mentioned elements, *food* is the most central dimension with a centrality index of 0.50, followed by the *scenery*, *mountain* and *weather* with respective values of 0.41, 0.31 and 0.27. The associated words that evoked the idea of the *food* category are cheese, cheese fondue, chocolate, charcuterie, milk, hot chocolate and Toblerone. Then, the *scenery* with greenery, panorama, nature and *mountain* characterised by the Alps, Mt. Titlis, and Matterhorn.

In contrast, the bottom right quadrant represents the secondary periphery of the social representations in which categories have low frequency and low importance. Based on the matrix, the closest category to the cut-off is the *bank* associated with elements such as banks, money laundering, secure banking and storing funds. The dimension *expensive* is associated with high-living costs and expensive country, while the dimension *watch* is associated with the watch, stopwatch, and clock. In addition, the dimension *quality* pertained to calm, safe, and seriousness, while *tourism* is related to vacation, travel destination and tour.

In this study, consumer segmentation is performed in order to investigate the core and peripheral areas of non-vitamin and vitamin users. Therefore, the subsequent sections indicate the shared elements between the two mentioned groups.

4.1.1.1 Characteristics of the corpus: diversity and rarity indexes

Table 5: Characteristics of non-vitamin (n=39) and vitamin (n=81) users corpus

| | Non-users (n=39) | Users (n=81) | Combined |
|--------------------|------------------|--------------|----------|
| Total evoked words | 169 | 363 | 532 |
| Quantity of types | 117 | 243 | 360 |
| Quantity of HAPAX | 15 | 10 | 25 |
| Diversity index | 0.70 | 0.67 | 0.67 |
| Rarity index | 0.13 | 0.04 | 0.07 |

Source: Czarina Nale Robles (2022)

The characteristics of the corpus generated by non-vitamin users and users are presented in the table above, including the calculations for diversity, rarity and INCEV indexes. After the triangulation process, the corpus produced by non-users and users is 30 and 34 categories of evoked words, respectively.

With a value of 1 indicating a maximum diversity, both non-users (0.70) and users (0.67) have obtained a high diversity index (more than 0.5). The outcome signifies that the bigger the index, the bigger the diversity among the evoked words. However, the rarity index corresponding to the ratio of the words evoked only once to the number of different cited words is relatively low for both non-users and users (0.13 and 0.04, respectively).

For this purpose, a low rarity index implies that the degree of social sharing represents a significant homogeneity among the participants' perceptions. Furthermore, despite a lower number of evoked terms than users, non-users have a higher tendency to produce HAPAX or the proportion of words cited only once.

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4.1.1.2 Frequency-importance analysis

With regards to frequency cut-off points, non-users account for 11.5 while 19 for users. This means that the categories of associated words with a frequency exceeding the cut-off of 11.5 for non-users and 19 for users are considered to have a high frequency, and those underneath these numbers are regarded to have a low frequency. On the other hand, the average importance scores for non-users and users are equivalent to 56.5 and 86, respectively. Therefore, dimensions with an importance value beyond these limits are sorted as having high importance, while those with an importance score underneath are deemed low importance.

The central core zone of the social representations is discerned in the upper left corner of the matrix. This area represents the categories with high frequency and high importance. For non-users, this quadrant includes two dimensions: *food* and *scenery*, and *weather* fall on the cut-off value located in the first periphery. Concerning the users, the central core includes dimensions such as *food*, *scenery*, *mountain*, and *weather*. These two groups express a shared understanding aside from the additional element *mountain* from the users, but with a difference in frequency.

In contrast, the second periphery represents the low frequency and low importance categories or dimensions. Figure 7 defines that the research participants (n=120) are heterogeneous regarding their perceptions of Switzerland. The participants evoked a relatively large number of dimensions, which could be due to a lack of knowledge or familiarity with Switzerland compared to its neighbouring countries in the European Union.

Table 5 depicts that the high diversity index of 0.67 with regard to the evoked dimensions could be due to Indonesia's distinctive geographical and cultural aspects. Indonesia is linguistically diverse and the largest archipelago in the world, with over hundreds of ethnic groups across the country. Therefore, the dispersion of the islands represents that distinct microcultures exist in every region, which explains the diversity among the research participants' perceptions. Furthermore, knowing that Switzerland is a small country and its geographical distance to Indonesia could be an additional aspect that impacts the high diversity index.

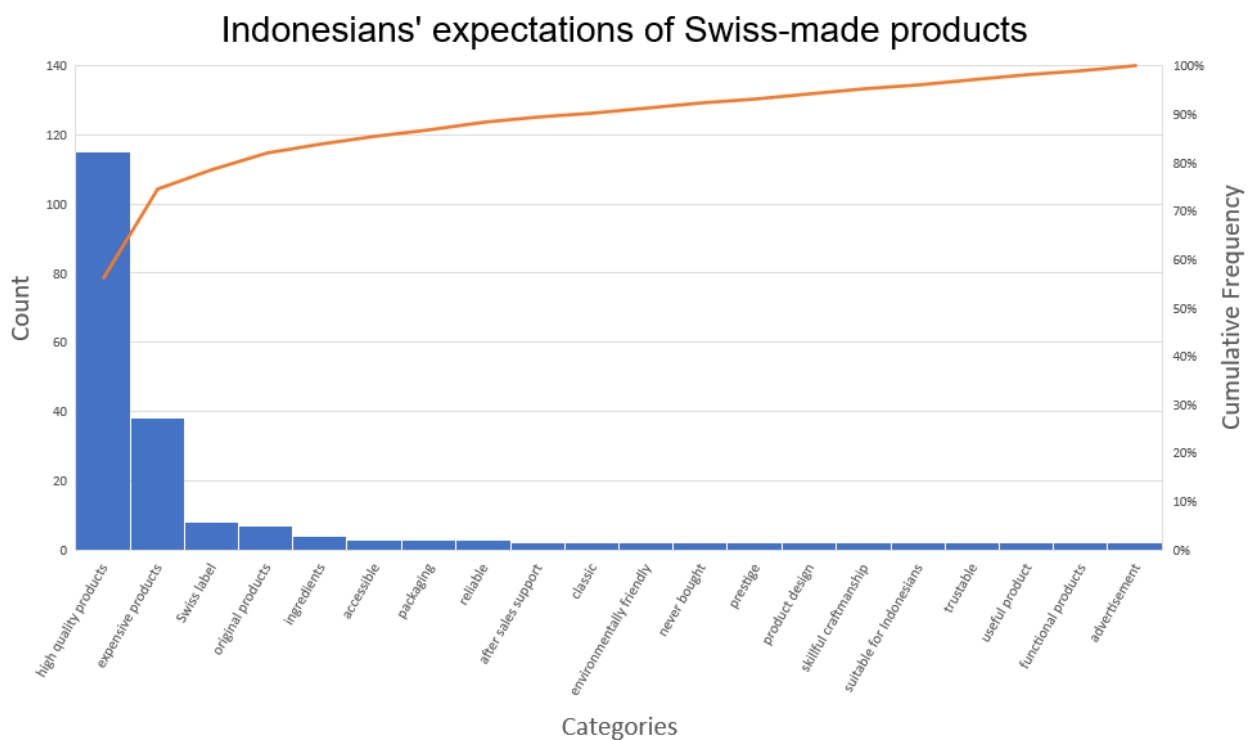
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4.2 Expectations on products made in Switzerland

Aside from understanding the research participant's perceptions of Switzerland, it is also important to highlight their expectations of Swiss-made products. These individuals are asked to cite a maximum of three expectations, and a total of 275 expectations are gathered. Semantically and thematically related words are grouped, leading to 53 categories.

However, the categories with a frequency of 0% are excluded, and only 20 categories are considered to perform the analysis. For this context, the top 6 evoked expectations are discussed in detail in the subsequent pages. As an overview, Table 6 presents Indonesians' expectations of Swiss-made products:

Table 6: Indonesians' expectations of Swiss-made products



Source: Czarina Nale Robles (2022)

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“High quality products”

As seen in the chart, Indonesians have relatively high expectations of the quality of Swiss-made products and the associated words in relation to this category sum up to 87 counts. In other words, 115 individuals out of 120 (72.5%) share a common expectation of products made in Switzerland.

They have highlighted a few popular Swiss identities such as watches (Rolex and Patek Philippe), a laboratory product by the company Buchi, a Swiss army knife and food (chocolate, particularly Toblerone, milk, and cheese). Goods are expected to be carefully developed with precision, quality controlled, durable, long-lasting, and produced by the excellent craftsmanship of its highly skilled workforce.

Moreover, it is stated that “the uniqueness of Swiss products made Switzerland to be known worldwide” and highly fulfils their expectations. Therefore, having a high-quality product is one factor that influences Indonesians to buy products made in Switzerland.

“Expensive products”

As mentioned previously, Indonesians perceived Switzerland as an expensive country, especially concerning the cost of living and its goods, cited 38 times. However, Indonesians are still interested in purchasing Swiss-made products despite marking them with a high price, gaining the opportunity cost of having premium, high-quality products.

“Swiss label”

Swiss-made sells. For Indonesians, “Switzerland” itself is already considered a brand. The value of the Swiss label represents as much as 20% of the sale price for certain products and services in comparison to other countries (S. M. E. Portal 2021). The participants highlighted that the label *made in Switzerland* is associated with high-quality standards. Thus, Switzerland’s reputation and seriousness regarding quality are considered the country’s competitive edge compared to other markets.

“Original products”

Authenticity matters. Indonesians are influenced to buy a product if there is a clear indication that the latter is imported from Switzerland and “not a knock-off”. In 2021, the recorded value of Swiss exports to Indonesia amounted to CHF 346M (Embassy of the Republic of Indonesia in Bern 2022).

“Ingredients”

Indonesians expect consumables such as food from Switzerland is highly nutritional and mostly made from natural ingredients or organic. In fact, products made from natural ingredients are rising in popularity among Indonesians (Euromonitor International 2021c). Also, based on the consumer analysis, participants specified that ingredients are one of the most important factors they would consider when purchasing Swiss-made vitamins.

“Accessible”

In terms of edibles, research participants expect Swiss-made foods to be *“suitable for Indonesians”* and their tastes, notably that 86.7% of Indonesians identified themselves as Muslims (World Population Review 2022) and have to respect dietary regulations.

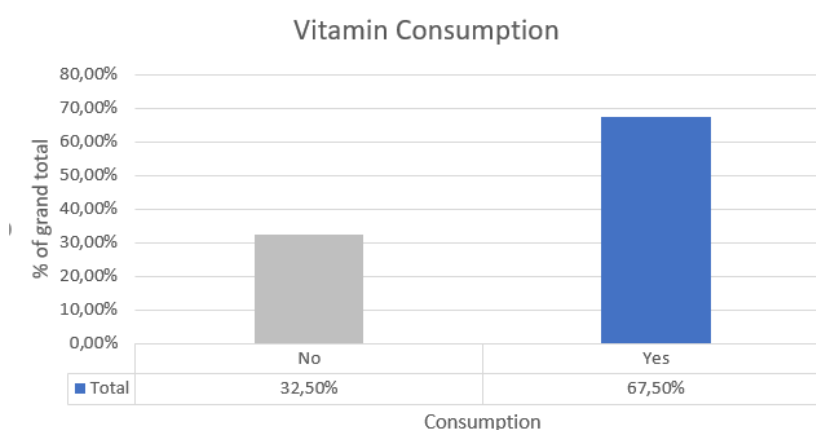
To quote a respondent, *“if the price of Swiss products is suitable for my budget, I will buy more frequently”*. In this context, Indonesians hope the prices of Swiss-made products will be more affordable so that they can manage to purchase more products made in the country and *“compete for prices with Chinese products”*.

One of the most critical aspects they consider is the accessibility of Swiss products in Indonesia, especially since some research participants have not tried any of them due to a lack of awareness and unfamiliarity with any Swiss products. Also, there are not many outlets in Indonesia where they could find the said goods.

4.3 Consumer Analysis

In this section, we seek to comprehend the characteristics of vitamin and non-vitamin users and identify the core drivers of their consumption behaviours. Among the 120 research participants, a significantly high percentage consume vitamin supplements. To give an overview of this market, the graph below depicts the proportion of vitamin and non-vitamin users.

Figure 8: Distribution of non-users and users of vitamin supplements



When asked if they have ever bought vitamin supplements made in Switzerland, only 10.83% responded “yes” and consume multivitamins (53.85%), followed by vitamin C (23.08%) and vitamin D (15.38%). In contrast, the rest consumes Dr Vogel products.

On the contrary, participants who responded “no” confirmed that they are not aware of vitamins made in Switzerland (81.13%), the price tends to be more expensive (8.49%), and they prefer locally made vitamin supplements, thus made in Indonesia (6.60%). Others express their preference for consuming fruits and vegetables instead.

Moreover, participants pointed out different factors they would consider when purchasing Swiss-made vitamins. According to the respondents, they primarily check out the price (19.95%), ingredients (16.51%), and the product’s availability across the country (15.83%). Also, they look into recommendations or reviews by other consumers (14.45%), labels & certifications (13.07%), expert opinion (11.70%) and the brand/manufacturer deemed to be the least important (8.49%).

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In this study, it is also essential to identify the participant's overall lifestyle. Therefore, Likert-scale questions are provided wherein the latter has to respond from strongly disagree to strongly agree to the specific statements:

- *Statement a: "I take care of my overall health and wellness"*

In the first statement, the "strongly agree" category has the most responses. In other words, 77 respondents (64.17%) strongly agreed with the statement mentioned above, followed by somewhat agree (28.33%), neither agree nor disagree (5%), somewhat disagree (2%) and strongly disagree (0.83%). The category in which the cumulative percentages crosses 50% is still the "strongly agree" category. Thus, 64.17% of the respondents care for their health and wellbeing.

- *Statement b: "I wish to live a healthy lifestyle but often don't have discipline"*

In this second statement, 46.67% of the respondents "somewhat agree" with wishing to live a healthy lifestyle but often do not have discipline. Again, most respondents identified themselves in this category, followed by strongly agree (25.83%), and only 4.17% strongly disagreed with the statement. Also, the category in which the cumulative percentage crosses 50% is still "somewhat agree".

- *Statement c: "I wish to live a healthy lifestyle but often don't have the means or resources"*

In this third statement, 39.17% of the respondents "somewhat agree" that they wish to live a healthy lifestyle but often do not have the means or resources. Also, this category is where the cumulative percentages cross at 50%. While a proportion of 22.50% neither agree nor disagree, approximately 8.33% strongly agree with the statement.

- *Statement d: “I take care of how I look”*

50% of the participants somewhat agree that they take care of their physical appearance, followed by the strongly agree group with 35.83% of respondents. Therefore, the category in which the cumulative percentage crosses 50% is “somewhat agree”. However, 5% of them somewhat disagree with the said statement.

4.3.1 Vitamin users

In Indonesia, the demand for vitamins continues to surge as consumers seek to support their immunity. According to the survey conducted among 120 participants, 67.50% of them are vitamin users. This section describes the vitamin users and discusses the factors that impact their consumption behaviours.

Among the participants who identified themselves as vitamin users, 95% mentioned that they rely on vitamin supplements to take care of their overall health and wellbeing.

In terms of vitamin forms, an estimate of 56.79% are observed to be taking multivitamins, succeeded by vitamin C (25.93%), vitamin D (8.64%) and vitamin E (1.23%). The 7.41% who responded “Other” consumes other types of vitamins not mentioned in the provided selection, such as homemade probiotics, vitamin A, wheatgrass, Habbatussauda & honey, omega fish oil, zinc and vitamin B.

Indeed, the predetermined types are not chosen randomly. According to the study executed by the Council for Responsible Nutrition in 2019, the most in-demand supplements among the US adults are multivitamins (1st), vitamin D (2nd) and vitamin C (3rd), to name a few (Kamiński, Kręgielska-Narożna, Bogdański 2020).

In terms of frequency of consumption, 59.26% of the users take their vitamin supplements every day, followed by once a week (29.63%), once a month (4.94%) and a few times a year (2.47%). However, 3.70% of the participants who responded “other” mentioned that they take vitamins *every other day*, *every two days*, and one interestingly specified that it *depends on her condition*.

In selecting vitamin forms, tablets and capsules are considered the most popular among the participants, with a proportion of 51.85% and 39.51%, respectively. They are followed by liquids (4.94%), gummies (2.47%) and powders (1.23%).

Most of the vitamin users are observed to take supplements by the recommendation of their general doctor (24.42%), family (22.67%), friends (16.86%) and dietitian or nutritionist (11.05%). On the other hand, users with a combined proportion of 25% are influenced by the internet and television.

With regard to distribution channels, 67.90% of users purchased their vitamins in a pharmacy, followed by online retailers (14.81%) within Indonesia, local convenience stores or supermarkets (12.35%) and direct marketing (3.70%).

Furthermore, different factors influence the vitamin users purchasing vitamin supplements. These are the price (19.22%), ingredients (18.51%), nutrition facts (18.51%), recommendation or review (15.30%) and expert opinion (12.46%). Only a few attaches importance to the brand (8.54%), local production (4.63%) and packaging promises (2.85%).

4.3.2 Non-vitamin users

Although the demand for vitamins in Indonesia continues to accelerate due to different factors, several Indonesians are indifferent and opt to live without consuming vitamin supplements. The questionnaire reveals that 39 out of 120 participants, or 32.50%, are reported as non-vitamin users. The objective of this section is to identify who the non-vitamin users are and the rationale for non-usage.

From the perspective of the non-vitamin users, this segment believes that taking a vitamin supplement is not essential as they have a healthy lifestyle (43.59%), vitamins are expensive (15.38%), fear potential secondary effects (10.26%) and are sceptical regarding vitamin supplements' claims of effectiveness (5.13%).

In addition, a proportion of 25.64% responded "Other". Their rationales for not consuming vitamin supplements are the following: *often forgot to consume it regularly, prefer vitamins from fruits or vegetables instead of supplements, not advised by their doctor, and nutrients can be obtained from food consumption every day, unessential, not yet important, no discipline on consuming it, only consumes vitamins when sick and laziness.*

However, according to these non-users, their perspective toward vitamin supplements will likely change depending on the circumstances. For example, they will start consuming vitamins if their doctor recommends them to do so (46.15%) and if their health is deteriorating (38.46%).

The remaining 15.38% from the "Other" category have contradictory beliefs. Although non-vitamin users are reluctant to consume vitamin supplements, some could change their perceptions. They are willing to take vitamins by the recommendation of their general or Ayurvedic doctors and when they find the will and consistency to do so. On the other hand, some firmly believe that vitamin supplements are unnecessary.

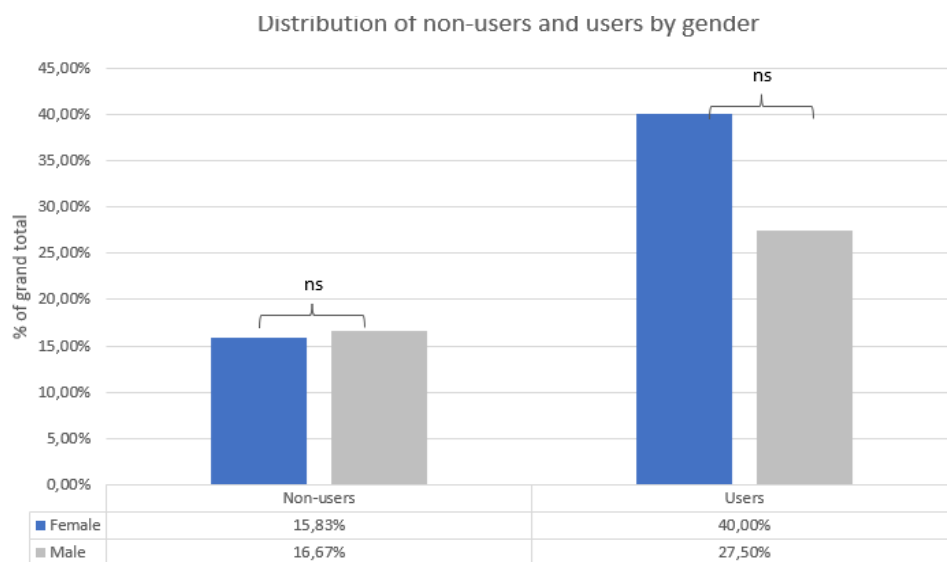
As a result, 87% agree that they care for their overall health and wellbeing, and 79% agree to live a healthy lifestyle but often lack discipline. Also, an equal proportion of 33.3% (agree/disagree/neutral) often do not have the means or resources and 89.7% look after their physical characteristics.

4.3.3 Analysis of demographic determinants of vitamin consumption

This section applies multiple statistical tests, including Pearson's chi-squared tests, one sample and independent T-tests, one-way ANOVA and Probit regression model, in order to determine whether demographic characteristics such as age, gender, region of residence and educational attainment have no effect on Indonesians' decisions to consume vitamin supplements.

4.3.3.1 Independent T-tests

Figure 9: Distribution of non-users and users of vitamin supplements by gender



T-test: $p > 0.05$ (non-significant), $p < 0.05$ (*), $p < 0.01$ (**), $p < 0.001$ (***)

Appendix 9 presents the observed frequencies, indicating that the pattern of vitamin consumption may be dissimilar across the gender of the participants. It seems that females consume more vitamin supplements than men. To confirm whether the observed difference is significant, the result of the Pearson Chi-square test is $\chi^2 = 1.1861$ with a probability value of 0.276. The χ^2 specifies that the distribution is statistically non-significant and fails to reject the null hypothesis ($p > 0.05$). Hence, there is no relationship between the participants' gender to consumption of vitamin supplements.

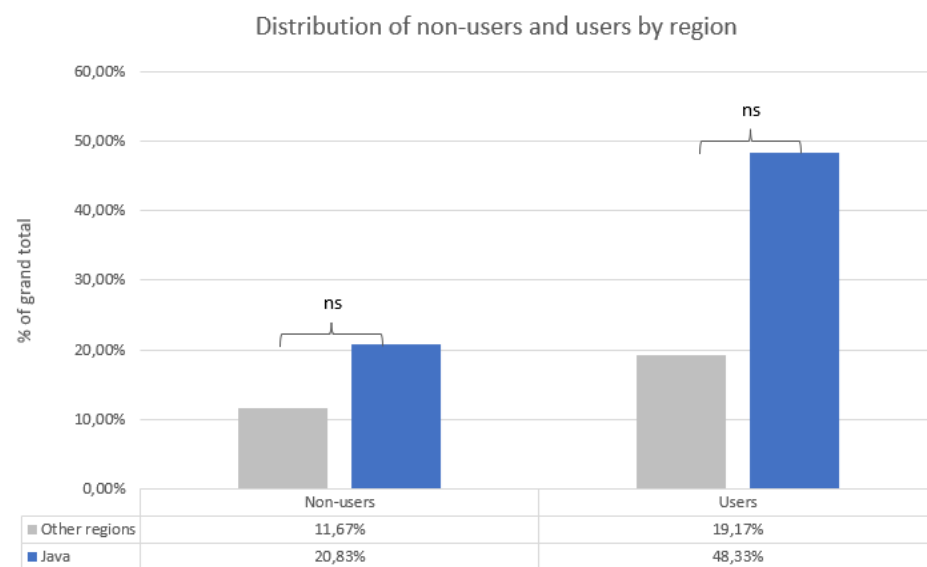
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The data in Appendix 10 provides appropriate descriptive statistics along with the mean, standard deviation and actual results based on the independent t-test to determine if there are differences in vitamin users based on the gender of the participants, consisting of females and males. The findings demonstrate that females had a statistically significantly higher rate of vitamin consumption (0.716 ± 0.055) in this research study compared to male participants (0.622 ± 0.067) with a degree of freedom $t(118) = 1.0854$.

On the other hand, the similar method is applied to determine if there are differences in non-vitamin users based on gender. The results indicate that males had statistically significantly higher rate of non-consumers of vitamin supplements (0.377 ± 0.067) than female participants (0.283 ± 0.055) with a degree of freedom $t(118) = -1.0854$. Moreover, both non-users and users had a p-value $\Pr(|T| > |t|) = 0.2800$. All the three alternative hypothesis exceeds 0.05, thus, there is no sufficient evidence to reject the null hypothesis. Therefore, similarly with the result of Pearson Chi2, there is no relationship between the participants' gender and their decision to consume vitamin supplements.

Figure 10: Distribution of non-users and users of vitamin supplements by region



T-test: $p > 0.05$ (non-significant), $p < 0.05$ (), $p < 0.01$ (**), $p < 0.001$ (***)*

The observed frequencies in Appendix 11 indicate that the pattern of vitamin consumption may be unrelated across the region of residence of the participants. To analyse whether the observed difference is significant, the result of the Pearson Chi-square test is $\chi^2 = 5.3691$ with a probability value of 0.251. The χ^2 concludes that the

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distribution is statistically non-significant, and the null hypothesis would not be rejected ($p > 0.05$). Therefore, the Chi-square test and the t-test below indicate that the residence region is not a determinant for an individual to consume a vitamin.

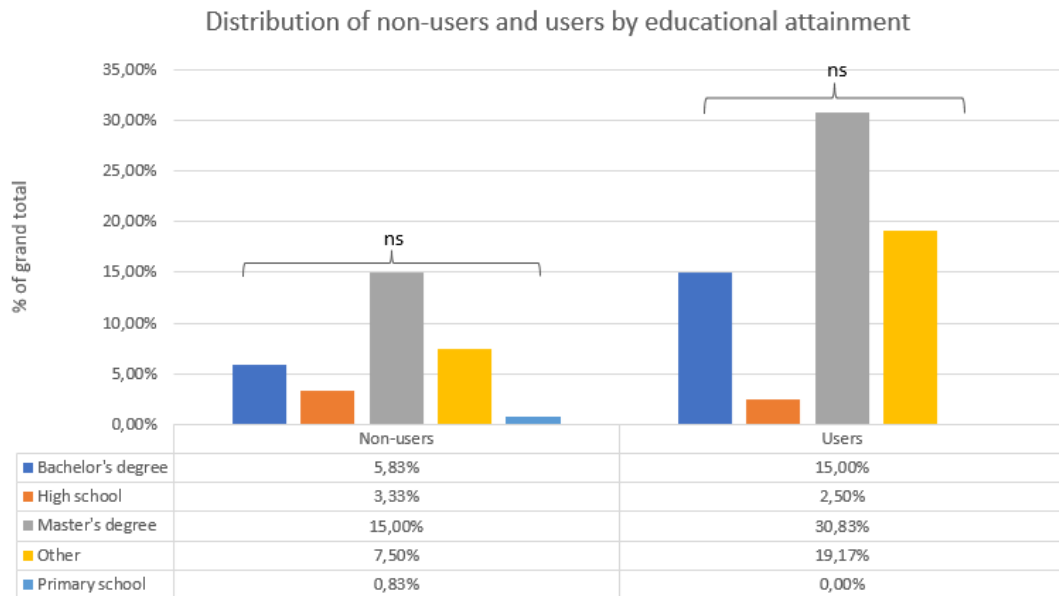
The data in Appendix 12 provides appropriate descriptive statistics comprising the mean, standard deviation, and actual results based on the independent t-test. The aim is to determine if there are differences in vitamin users based on the region of residence among the participants (1= Java, 0=the rest of the pre-determined regions combined) consisting of females and males. The results demonstrate that region Java had a statistically significantly higher number of vitamin users (0.698 ± 0.050) in comparison to the other regions within Indonesia, including Switzerland (0.621 ± 0.080) with a degree of freedom $t(118) = -0.8290$.

A similar method is conducted to determine if the region of their residence influences an individual not to consume vitamin supplements (i.e., availability of the vitamins across the regions). However, statistically, the results indicate that other regions had a significantly higher rate of non-users of vitamin supplements (0.378 ± 0.080) than region Java (0.301 ± 0.050) with a degree of freedom $t(118) = -1.0854$. Both non-users and users had a p-value $\Pr(|T| > |t|) = 0.4088$ and are located in Java.

The three alternative hypotheses exceed 0.05. Thus, there is insufficient evidence to reject the null hypothesis that there is no relationship between vitamin consumption and gender. Also, with the result of Pearson Chi², there is no relationship between the participants' gender and their decision to consume vitamin supplements.

4.3.3.2 One-Way ANOVA

Figure 11: Distribution of non-users and users by educational attainment

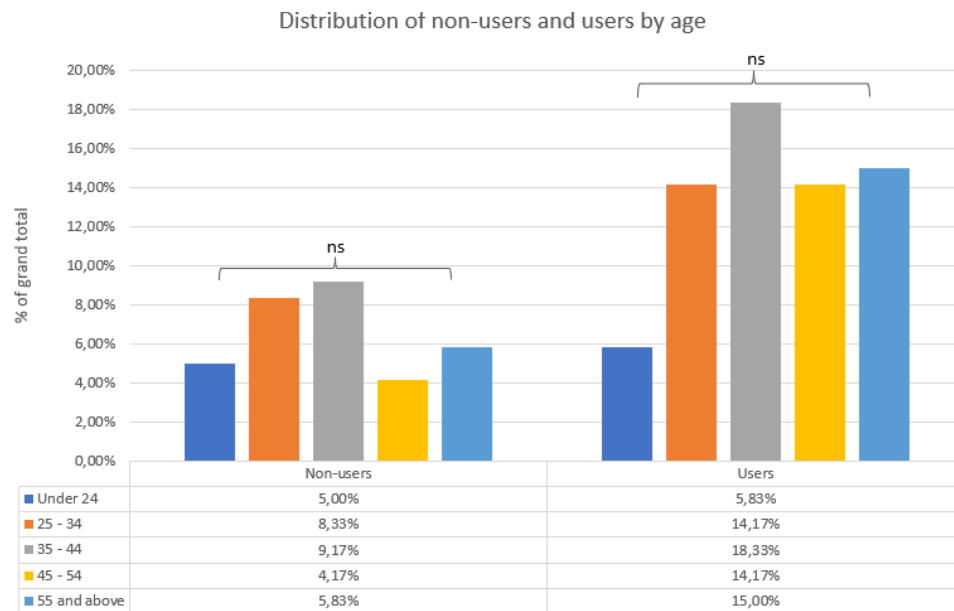


One-Way ANOVA: $p > 0.05$ (non-significant), $p \leq 0.05$ (significant)

The observed frequencies (see Appendix 13) exhibit that the pattern of vitamin consumption may differ depending on the participant's educational attainment. To evaluate whether the observed difference is significant, the outcome of the Pearson Chi-square test is $\chi^2 = 4.5259$ with a probability value of 0.339. Similarly, with the three previous groups, the χ^2 concludes that the distribution is statistically non-significant, and the null hypothesis would not be rejected ($p > 0.05$). Therefore, the participant's level of education does not influence their decision to consume vitamin supplements.

A one-way ANOVA (see Appendix 14) is performed to determine if vitamin consumption is different for participants with different levels of educational attainment. It is concluded that there is statistically no significant difference between the groups ($F(4,115) = 1.13$, and the corresponding p-value is 0.3474 ($p > 0.05$). Hence, there is not enough evidence to reject the null hypothesis.

Figure 12: Distribution of non-users and users by age



One-Way ANOVA: $p > 0.05$ (non-significant), $p \leq 0.05$ (significant)

Considering all the age groups, the observed frequencies (see Appendix 15) provide an overview of how vitamin consumption patterns may differ across different age groups. The observed frequency counts indicate that 39 or 32.50% are non-users of vitamin supplements, and 81 or 67.50% are users. The expected frequencies are 39.0 and 81.0. To test whether the observed difference is significant, the outcome of the Pearson Chi-square test is $\chi^2 = 2.5571$ with a probability value of 0.634. The χ^2 indicates that the distribution is statistically non-significant, and the null hypothesis would not be rejected ($p > 0.05$). Therefore, there is no association between the two variables, and age does not influence an individual to consume vitamin supplements.

A one-way ANOVA (see Appendix 16) is performed to determine if vitamin consumption is different for participants with different levels of educational attainment. It is concluded that there is statistically no significant difference between the groups ($F(4,115) = 1.13$ and the corresponding p-value is 0.6449 ($p > 0.05$)). Hence, there is not enough evidence to reject the null hypothesis.

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4.3.3.3 Probit regression model

The estimation result of the probit regression model is illustrated in Appendix 17. Based on the output, independent variables such as gender ($z=1.36$), region ($z=0.57$), education ($z=0.65$), and age ($z=1.00$) all have a z-value above 0.05, referring that none among these demographic factors are significant.

Thus, these independent variables have no effect on consumers' decisions to consume vitamin supplements.

4.3.4 Willingness to pay for an equivalent vitamin made in Switzerland

The objective of this section is to determine how much are Indonesians more (or less) willing to pay (in percentage terms) for equivalent vitamin supplements made in Switzerland compared to local (see Figure 15) and other leading foreign competitors in the Indonesian market, particularly China (see Figure 16) and Singapore (see Figure 17). Moreover, in this study, the population follows a normal distribution with percentages ranging from -50 to +50 and with the mean equal to 0.

Therefore, simple t-tests are performed in order to identify whether the price for equivalent vitamin supplements made in Switzerland compared to the mentioned competitors has no effect on Indonesians' decisions to purchase vitamin supplements.

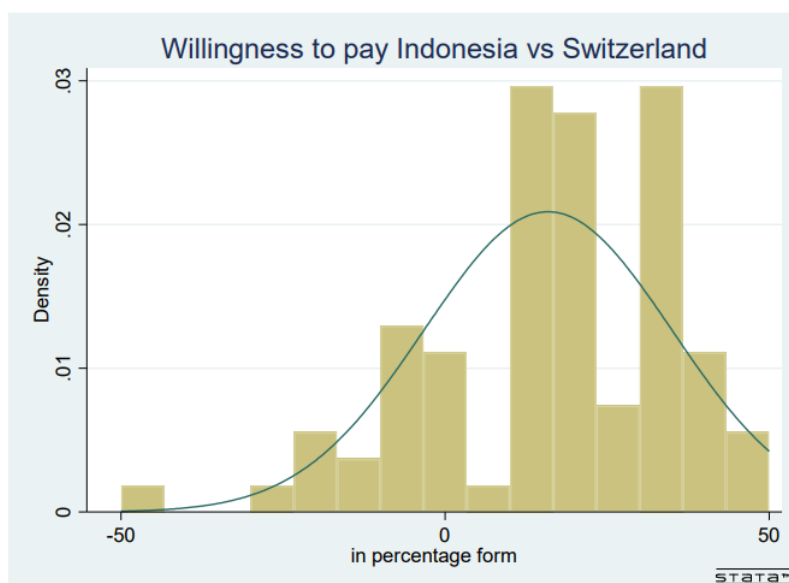
If the vitamins an Indonesian consumer takes are from Indonesia, on average, they are willing to pay 15% more ($M=15.86$, $SD=2.12$) for an equivalent vitamin made in Switzerland ($t(80)=7.4777$). Therefore, with a p-value or $\Pr(|T| > |t|) = 0.0000$, the null hypothesis is rejected and by looking at the higher alternative hypothesis, the observed results have a p-value equivalent to 0.0000 (see Appendix 18).

Furthermore, suppose the vitamins an Indonesian consumer takes are from China. In that case, on average, the consumer is willing to pay 4% more ($M=4.48$, $SD=2.67$) for an equivalent vitamin made in Switzerland ($t(80)=1.67$). Therefore, with a p-value = 0.09, there is insufficient evidence to reject the null hypothesis. Since the higher alternative hypothesis' p-value is less than $\alpha=0.10$, this significance level would lead to accepting the alternative hypothesis with an observed p-value of 0.04 (see Appendix 19).

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However, if the vitamins an Indonesian consumer takes are from Singapore, on average, the consumer is willing to pay 9% more ($M=9.55$, $SD=2.05$) for an equivalent vitamin made in Switzerland ($t(80)=4.65$. With a p-value or $\Pr(|T| > |t|) = 0.0000$, the null hypothesis is rejected. The higher alternative hypothesis shows a p-value of 0.0000 (see Appendix 20).

Figure 13: The maximum extra percentage a consumer is willing to pay for a vitamin produced in Switzerland compared to an equivalent vitamin made in Indonesia



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Figure 14: The maximum extra percentage a consumer is willing to pay for a vitamin produced in Switzerland compared to an equivalent vitamin made in China

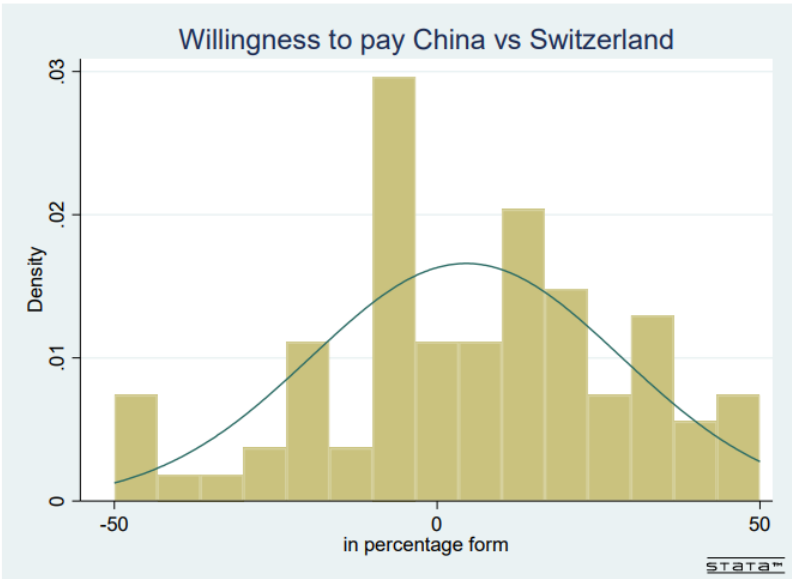
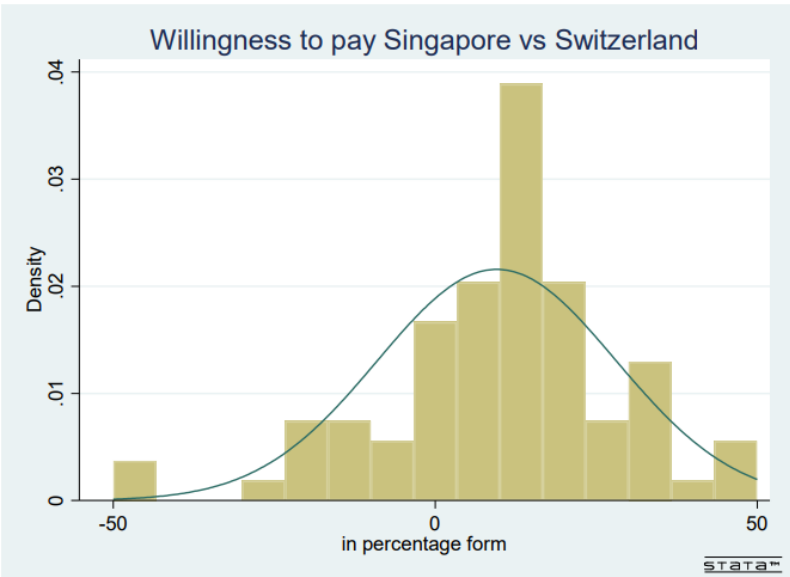


Figure 15: The maximum extra percentage a consumer is willing to pay for a vitamin produced in Switzerland compared to an equivalent vitamin made in Singapore



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5. Key Findings and Recommendations

This section outlines the key findings from the primary data analysis, followed by several recommendations for Swiss SMEs to discover opportunities in the Indonesian vitamin supplements market.

5.1 Summary of key findings

Free Word Association Task

The result of the prototypical analysis depicts that all the research participants have distinct representations of Switzerland. The dimensions in both segments are represented solely in the central core zone and secondary periphery of the social representation theory.

Based on the frequency-importance matrix, the most evoked dimensions in the central core zone are *food, scenery, mountain, and weather*. Therefore, the mentioned dimensions are deemed to have high frequency and high importance. Swiss chocolates and cheese are the most dominant evoked words among the research participants, followed by the country's impeccable nature and landscape. Mt. Titlis and Matterhorn are the most recognized mountains, and the participants also associated Switzerland with its snowy and cold weather.

The second periphery consists of dimensions with low frequency and low importance. According to the research participants, these dimensions include bank, watch, and tourism, to name a few.

In terms of indexes, the diversity index of the combined segments is relatively high, amounting to 0.67. The participants evoked a relatively large number of dimensions, which could be due to a lack of knowledge or familiarity with Switzerland compared to its neighbouring countries in the European Union. Also, it could be due to Indonesia's distinctive geographical and cultural aspects, mainly because Indonesia is linguistically diverse and has numerous ethnic groups. Furthermore, Switzerland is a small country and geographically distant from Indonesia.

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On the other hand, the rarity index of 0.07 is relatively low and indicates a homogeneity in the degree of social sharing among the participants' perceptions. Finally, in the case of the INCEV index, food is the most central dimension with a centrality index of 0.50.

Expectations on Swiss-made products

Ordered by frequency counts, from highest to lowest, Indonesians' expectations of products made in Switzerland include high-quality products, expensive products, Swiss label, original products, ingredients, accessible. Based on the analysis, Indonesian consumers highlighted that the label *Made in Switzerland* is associated with high-quality standards. Therefore, this specification is Switzerland's competitive advantage compared to other markets despite its products' higher prices.

Several research participants also mentioned that there are not a lot of outlets to find Swiss-made products, and some respondents are not familiar with products made in Switzerland, thus, preventing them from making a purchase. They also hope Swiss products, particularly the edibles, suit them as most Indonesians identify as Muslims and respect dietary regulations (Halal).

Demographic factors

On average, the age range of the research participants is between 35 to 44 years old. Females are more willing to participate in a research study than males. In terms of region of residence, Java is the most represented among the other regions. Also, the highest level of education attained is a Master's degree.

Consumer analysis

Vitamin users are the most represented group in this research study. The most purchased type of vitamin supplement made in Switzerland is multivitamins. However, a lack of awareness of Swiss-made products prevents some Indonesians from purchasing vitamin supplements made in Switzerland.

There are several factors that Indonesians would consider when purchasing Swiss-made vitamins, such as price, ingredients, and availability of the product across the country. With regard to their overall lifestyle, on average, Indonesians strongly agree that they take care of their overall health and wellness. However, they agree on wishing to live a

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healthy lifestyle but often do not have discipline and resources. It is also mentioned that Indonesians, on average, somewhat agree that they care about their appearance.

Characteristics of vitamin users

Among this group, 95% rely on vitamin supplements to care for their overall health and wellness. According to the respondents, multivitamins, vitamin C, and vitamin D are the most consumed type of vitamin supplements. In terms of frequency of usage, vitamin users, on average, take their vitamin supplements every day. In accordance with this group, tablets and capsules are the most popular vitamin forms. Their source of information about vitamins includes their general doctor, family, and friends, in respective order of importance. Furthermore, users primarily purchase their vitamins from the pharmacy, followed by online retailers. The factors influencing users to purchase vitamin supplements are price, ingredients, nutrition facts and recommendations or reviews.

Characteristics of non-vitamin users

Non-users consider vitamin supplements as non-essential as they follow a healthy lifestyle. The other reasons why this group does not consume vitamin supplements are its expensive costs, potential side effects, often forgetting to consume it regularly, and prefer vitamins from fruits and vegetables instead of supplements. On average, non-vitamin users take care of their overall health and wellbeing. If necessary and by their general doctors' recommendation, non-users would willingly consume vitamin supplements.

Analysis of the relationship between demographic factors and consumers' decision of vitamin consumption

The collected primary data is analysed using multiple statistical tests. Firstly, t-tests are performed for gender and region of residence, while One-Way ANOVA is applied for age and educational attainment. Based on the outcome, these variables have no effect on Indonesians' decision to consume vitamin supplements. Furthermore, with the Probit regression model, the four mentioned demographic factors are deemed not to influence Indonesians' decision to consume vitamin supplements. Therefore, all the results are statistically insignificant and conclude that the four demographic factors have no influence on consumers' vitamin intake.

Willingness to pay

This section aims to determine how much Indonesians are more (or less) willing to pay (in percentage terms) for equivalent vitamin supplements made in Switzerland compared to local and other leading foreign competitors in the Indonesian market. In this case, simple t-tests are applied to measure the maximum price that a consumer is willing to pay for a vitamin supplement.

The results depict that for a vitamin produced in Indonesia, a consumer is willing to pay 15% more for an equivalent vitamin made in Switzerland. Then for a vitamin produced in China, Indonesia's leading supplement importer, a consumer is willing to pay 4% more for an equivalent vitamin made in Switzerland. Finally, known as Indonesia's third-leading importer of the said supplement, for a vitamin produced in Singapore, a consumer is willing to pay 9% more for an equivalent vitamin made in Switzerland.

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5.2 Recommendations

5.2.1 Increasing purchasing power of middle-class population

With regards to per-capita consumption, the middle class earn an approximately monthly disposable income between IDR 1.2 million to 6.0 million, equivalent to CHF 80.- (World Bank 2019).

The name “Switzerland” itself is considered a brand that encourages Indonesians to purchase products made in Switzerland. This is because they believe that Swiss goods are developed with precision, quality controlled, durable, and produced by the excellent craftsmanship of its highly skilled workforce. Moreover, Switzerland’s reputation and seriousness regarding producing high-quality products are considered the country’s competitive advantage compared to other markets. Therefore, associating Swiss-made products with high quality is the factor that influences consumers to buy products made in the country. Also, based on the analysis, Indonesians are convinced about purchasing Swiss-made products despite marking them with a higher price, gaining the opportunity cost of having premium, high-quality products.

In this case, consumers are asked about the maximum price (in terms of percentage) they would be willing to pay for vitamin supplements abroad compared to the available local products in the Indonesian market. Whether the vitamins are produced in Indonesia, China or Singapore, Indonesian consumers reveal that they are willing to spend more for equivalent vitamin supplements made in Switzerland compared to the mentioned markets. To summarize, if the vitamin supplements are made in Indonesia, consumers are willing to pay 15% more for an equivalent vitamin made in Switzerland. If the vitamins are produced in China, consumers are willing to pay 4% more for Swiss-made vitamins. Finally, if the vitamins are produced in Singapore, Indonesians are willing to spend 9% more for equivalent vitamins made in Switzerland. Therefore, this implies that Indonesia’s middle class has a growing consumer spending and interest in products made abroad, allowing Swiss SMEs to introduce their products in the Indonesian market. Also, the consumers’ willingness to pay for Swiss-made products represents an advantage in terms of competition.

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5.2.2 Rising health awareness among Indonesians

The middle-income households purchase more vitamin supplements despite the fact that most self-perceived to have high-quality dietary intake. It was mentioned in the analysis that, on average, both vitamin and non-vitamin users strongly agree with looking after their health and wellness. Indeed, Indonesians are becoming more aware and educated about the benefits of consuming vitamin supplements.

Since the vitamin users are the most representative group in this research study, Indonesians are likely to have developed a growing desire to strengthen their immunity and protect themselves from illness. Based on the analysis result, most Indonesians within this group consume vitamins daily, followed by those who only take them once a week.

Although non-vitamin users are reluctant about the necessity of taking vitamin supplements, non-vitamin users have a higher likelihood of shifting into vitamin users. The change in perspective is due to their general practitioners' recommendation and perceived need to consume vitamin supplements.

In addition, purchases of multivitamins, vitamin C and vitamin D are the most consumed vitamin types in Indonesia. While considering the mentioned types synthetic, the *ingredients* are one of the most highlighted attributes consumers consider when taking vitamin supplements. Furthermore, Indonesians expect consumables from Switzerland to be *highly nutritional* and mostly *made from natural ingredients or organic*. In fact, products made from natural ingredients are rising in popularity among Indonesians (Euromonitor International 2021c).

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5.2.3 Additional recommendations

Geographical niche market

In order to navigate Indonesia's vitamin supplements market, Swiss SMEs could consider focusing on and establishing a presence in the biggest cities in Indonesia, such as Jakarta, Surabaya and Medan, to export their vitamins. These cities have high population densities, allowing Swiss SMEs to access millions of consumers, particularly those who spend on health products such as vitamin supplements.

Distribution channel

Vitamin and dietary supplements in Indonesia are accessible through store-based retailing consisting of grocery retailers (ex., convenience stores and supermarkets) and non-grocery specialists (ex., pharmacies and drugstores).

Based on this research study, pharmacy is still considered the primary distribution channel in Indonesia as licensed pharmacists have the knowledge and expertise to recommend the most appropriate vitamin and dietary supplements consumers need. It is followed by local online retailers.

Examples of local pharmacies are Apotek K-24 and Kimis Farma. With regards to non-store retailing, the participants identified themselves as buying from direct selling and e-commerce, which the latter is deemed as the most convenient. Indonesia is considered to be Southeast Asia's fastest-growing e-commerce having approximately 170 million internet users (Swiss Business Hub Indonesia 2021).

The Marketing Concept and Customer-perceived value

SMEs need to become customer-driven instead of product-centred in marketing their products in the Indonesian market. This means that SMEs have to find the right product for their consumers based on their desires and needs, which are mentioned in the previous sections.

Also, Indonesians frequently highlight the quality of Swiss products and "Switzerland" is a brand name. These aspects are Swiss SMEs' competitive edge as they are the customer's perceived value. Moreover, it will likely be the cause to attract non-vitamin

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users to consume vitamin supplements made in Switzerland in case they change their perspective towards vitamin consumption.

However, on the other hand, it will likely be the cause to retain current vitamin users and maintain customer loyalty. Therefore, these two concepts would result in building lasting customer relationships.

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6. Conclusion

This research study aimed to understand the demand for vitamins in Indonesia and determine the underlying factors influencing the growing consumer demand. Domestic companies cannot fulfil the rising customer demand for vitamin supplements in the country, making them highly dependent on the international market. In contrast, Switzerland plays an essential role in the international market of vitamins and also acts as Indonesia's third-largest importer of vitamin supplements.

Based on a quantitative and qualitative analysis of Indonesians' perception and expectations of products made in Switzerland and their vitamin consumption behaviours, it is concluded that the four demographic characteristics, including gender, age, region of residence and educational attainment, have no influence on Indonesians' decision on consuming vitamin supplements. The results provide an insight that vitamin consumption is indeed a personal choice based on an individual's knowledge about their needs and lifestyle.

Furthermore, the results indicate that consumers' perceived value of Switzerland influences them to consume Swiss-made products. The growing consumption of vitamin supplements is due to the middle-class population's increasing purchasing power and awareness of preventive health measures to overcome micronutrient deficiency and prevent certain diseases. In addition, Indonesia's middle-class participants in this study have a growing interest in products made abroad, highlighting that they are more likely to spend on products made in Switzerland than other foreign competitors.

However, the generalizability of the results is limited by the homogeneity between the research participants, as most are faculty members of several public and private universities in Indonesia. In addition, there is a lack of data on Indonesians residing outside the region of Java due to the fact that these regions have low population densities.

It is beyond the scope of this study to define the market entry strategy of Swiss SMEs to the Indonesian vitamin supplements industry and to determine the country's local regulations and specific business practices and cultural aspects to establish a good

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harmony. Moreover, Indonesians consider the latter the most critical factor in a successful business.

Therefore, future studies should take into account the mentioned aspects and understand this market's supply perspective. In order to maximize the market opportunities, it is crucial to define how Swiss SMEs that have already been exporting their vitamin products in the Indonesian market could improve their market shares, particularly due to the Free Trade Agreement between these two countries. Also, to define the market entry strategy for Swiss SMEs to seize the promising opportunities of exporting vitamin supplements in Indonesia.

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Appendix 1: Sales forecast of vitamin supplements by category

Table 71 Forecast Sales of Vitamins by Category: Value 2021-2026

| IDR billion | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|--------------------------|----------|----------|----------|----------|----------|----------|
| - Multivitamins | 7,995.7 | 8,867.2 | 9,732.6 | 10,572.6 | 11,358.1 | 12,052.1 |
| - Single Vitamins | 6,580.3 | 7,186.2 | 7,735.4 | 8,211.7 | 8,647.0 | 9,085.2 |
| -- Vitamin A | - | - | - | - | - | - |
| -- Vitamin B | 1,338.0 | 1,393.2 | 1,445.9 | 1,501.7 | 1,556.4 | 1,606.5 |
| -- Vitamin C | 4,381.2 | 4,926.2 | 5,412.4 | 5,816.2 | 6,176.2 | 6,538.8 |
| -- Vitamin D | - | - | - | - | - | - |
| -- Vitamin E | 861.1 | 866.7 | 877.1 | 893.8 | 914.3 | 939.9 |
| -- Other Single Vitamins | - | - | - | - | - | - |
| Vitamins | 14,576.0 | 16,053.4 | 17,468.1 | 18,784.3 | 20,005.1 | 21,137.3 |

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Note: 2021 data is provisional and based on part-year estimates

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Appendix 2: Market share of local vitamin companies in Indonesia

Company Shares of Consumer Health

% Share (NBO) - Retail Value RSP - 2021

| | | | |
|-----------------------------|--|-------|---|
| Kalbe Farma Tbk PT | | 7.6% | ▲ |
| Tempo Scan Pacific Tbk P... | | 5.2% | ▼ |
| Sido Muncul PT | | 4.4% | ▲ |
| Herbalife Indonesia PT | | 4.1% | ▲ |
| Bayer Indonesia PT | | 3.9% | ▲ |
| Soho Industri Pharmasi P... | | 3.6% | ▲ |
| Konimex Pharmaceutical L... | | 3.2% | ▼ |
| Deltomed Laboratories PT | | 2.8% | ▼ |
| Combiphar PT | | 2.1% | ▼ |
| GSK Consumer Healthcare | | 2.0% | ▲ |
| Medifarma Laboratories I... | | 1.8% | ▼ |
| Johnson & Johnson Indone... | | 1.6% | ▼ |
| Citra Nusa Insan Cemerla... | | 1.5% | ▼ |
| K-Link Indonesia PT | | 1.4% | ▲ |
| Darya-Varia Laboratoria ... | | 1.3% | ▼ |
| Indocare Citrapasific PT | | 1.3% | ▲ |
| Merck Tbk PT | | 1.3% | ▼ |
| Bintang Toedjoe PT | | 1.2% | ▼ |
| Sanbe Farma PT | | 1.2% | ▼ |
| Others | | 48.7% | ▼ |

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Appendix 3: Data protection statement by the Federal Office for Customs and Border Security

« The desired data (information about Swiss SMEs that produces vitamin and supplements) is subject to data protection and may not be disclosed. The principle of data protection obliges us to guarantee the anonymity of importing and exporting companies, so that their activities cannot be reconstructed from our data. The Federal Office of Customs and Border Protection may group certain statistical data on the basis of Art. 16, para. 2 of the Ordinance on Foreign Trade Statistics (SR 632.14, Art. 16, para. 2) if their publication could cause serious harm to Swiss interests. Reading the statistics can reveal sensitive elements of company strategy (e.g. export turnover, pricing policy by country, main markets). The products for which you want information are the subject of a company application. The tariff numbers including vitamins are hidden in our Swiss-Impex database. For this reason, only partial results are currently published ».

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Appendix 4: Survey Questions (English)

Research study Indonesia-Switzerland

ExpertReview score Fair

Introduction

Q1.1

Hello, we are conducting a study on Indonesia at the Geneva School of Business Administration in...

★

...

Hello,
We are conducting a study on Indonesia at the Geneva School of Business Administration in Switzerland. We would like to ask you for your assistance in completing the following questionnaire which will take you approximately 5 minutes and participants will be kept anonymous. The survey is available in English and Bahasa Indonesia, you may change the language using the top right drop-down list. If you use a mobile phone, the horizontal position provides better visibility.

If you have any questions, please contact the study team at the following email address: czarina-nale.robles@etu.hesge.ch.
Thank you very much for your support.

☐ I consent, begin the study

Import from library

Add new question

Add Block

Perception of Switzerland

Q2.1

What comes to your mind when you hear "Switzerland"?

★ 1

★ 2

★ 3

Page Break

Q2.2

What are your expectations of products made in Switzerland? What influences you on buying one? Please indicate a maximum of 3 responses.

Page Break

Import from library

Add new question

Add Block

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▼ Purchasing behavior towards Swiss-made vitamins

Q3.1 ★

Have you ever bought vitamin supplements made in Switzerland?

Yes ☐

No ☐

----- Page Break -----

Q3.2 ★

▼ [Display this question](#)

If Have you ever bought vitamin supplements made in Switzerland? Yes Is Selected

What type of vitamin supplements did you buy?

☐ Multivitamins

☐ Vitamin D

☐ Vitamin C

☐ Vitamin E

☒ ★ Other

----- Page Break -----

Q3.3 ★

▼ [Display this question](#)

If Have you ever bought vitamin supplements made in Switzerland? No Is Selected

What did prevent you from buying Swiss-made vitamin supplements?

☐ I prefer locally-made vitamin supplements

☐ They are more expensive

☐ I am not aware of vitamins made in Switzerland

☒ ★ Other

----- Page Break -----

Q3.4 ★

What factors would you consider when buying Swiss-made vitamins? Please choose ALL that apply.

☐ Price

☐ Ingredients

☐ Availability across Indonesia

☐ Brand/Manufacturer

☐ Recommendation/Review

☐ Expert opinion

☐ Label (certification)

[Import from library](#)
[+ Add new question](#)

Add Block

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Consumer lifestyle

Q4.1

General statements about your overall lifestyle.
For each statement, please indicate how much you personally agree or disagree with the following:

I take care of my overall health and wellness.

I wish to live a healthy lifestyle but often don't have discipline.

I wish to live a healthy lifestyle but often don't have the means or resources.

I take care of how I look.

[Click here to edit scale points](#)

Import from library

Add new question

Add Block

Users of vitamin supplements

Q5.1

Do you take any vitamin supplements?

Yes

No

Q5.2

Display this question

If Do you take any vitamin supplements? Yes Is Selected

Which kind of vitamins are you taking?

Multivitamins

Vitamin D

Vitamin C

Vitamin E

Other

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Q5.3

★

▼


[Display this question](#)

If Do you take any vitamin supplements? Yes Is Selected

How often do you take a vitamin?

☐ Everyday

☐ Once a week

☐ Once a month

☐ Few times a year


☒ ★ Other

Page Break

Q5.4

★

▼


[Display this question](#)

If Do you take any vitamin supplements? Yes Is Selected

Among these different varieties, which form of vitamins do you take? Please pick only one.

☐ Capsules (consist of powder/jelly enclosed inside a water-soluble shell)

☐ Tablets (can be cut into half)

☐ Gummies

☐ Liquids

☐ Powders

☒ ★ Other

Page Break

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Q5.5

★

Display this question

If Do you take any vitamin supplements? Yes Is Selected

From which of the following sources do you get information about vitamin supplements? Please choose ALL that apply.

☐ Family
☐ Friends
☐ Television (advertisement/ commercial)
☐ Dietitian/Nutritionist
☐ Doctor
☐ Internet (website, blogs, social media)

Page Break

Q5.6

★

Display this question

If Do you take any vitamin supplements? Yes Is Selected

From which of the following distribution channels do you purchase the vitamins you take the most often? Please pick only one.

☐ Drug store/ Pharmacy
☐ Local convenience store/ Supermarket
☐ Online retailers (within Indonesia)
☐ Online retailers (abroad)
☐ ★ Other

Page Break

Q5.7

★

Display this question

If Do you take any vitamin supplements? Yes Is Selected

When you buy a vitamin, what attributes do you usually consider the most important? Please choose ALL that apply.

☐ Price
☐ Ingredients
☐ Nutrition facts
☐ Packaging promises
☐ Brand
☐ Recommendation/ Review
☐ Expert opinion
☐ Local production

Page Break

Q5.8

★

Display this question

If Do you take any vitamin supplements? Yes Is Selected

If the vitamins you take were from Indonesia, how much more (or less) you will be willing to pay (in percentage terms) for an equivalent vitamin Made in Switzerland?

-50-40-30-20-1001020304050

in percentage (%)

Page Break

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☐ Q5.9
 ★

Display this question

If Do you take any vitamin supplements? Yes Is Selected

If the vitamins you take were from China, how much more (or less) you will be willing to pay (in percentage terms) for an equivalent vitamin Made in Switzerland?

in percentage (%)

-50 -40 -30 -20 -10 0 10 20 30 40 50

Page Break

☐ Q5.10
 ★

Display this question

If Do you take any vitamin supplements? Yes Is Selected

If the vitamins you take were from Singapore how much more (or less) you will be willing to pay (in percentage terms) for an equivalent vitamin Made in Switzerland?

in percentage (%)

-50 -40 -30 -20 -10 0 10 20 30 40 50

Import from library Add new question

Add Block

Non-users of vitamin supplements

☐ Q6.1
 ★

Display this question

If Do you take any vitamin supplements? No Is Selected

If you don't consume any vitamin supplements, what's the most important reason you don't?

☐ I have a healthy lifestyle (do physical activities, eat a balanced diet)

☐ Vitamins are expensive

☐ I don't believe they work

☐ Fear of side effects

☒ ★ Other

Page Break

☐ Q6.2
 ★

Display this question

If Do you take any vitamin supplements? No Is Selected

What would make you consume vitamin supplements?

☐ If my health is deteriorating

☐ If my doctor recommends me to take a vitamin

☒ ★ Other

Import from library Add new question

Add Block

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Demographic Questions

Q7.1
How old are you?

☐ Under 18
☐ 18 - 24
☐ 25 - 34
☐ 35 - 44
☐ 45 - 54
☐ 55 - 64
☐ 65 or older

Q7.2
What is your gender?

☐ Male
☐ Female
☐ Non-binary / third gender

Q7.3
Which region do you live in?

☐ Java
☐ Kalimantan
☐ Maluku Islands
☐ Lesser Sunda Islands
☐ Western New Guinea
☐ Sulawesi
☐ Sumatra
☐ Abroad

Q7.4
What is the highest degree or level of school have you completed?

☐ Primary school
☐ High school
☐ Bachelor's degree
☐ Master's degree
☒ Other

Import from library
Add new question

Add Block

End of Survey

We thank you for your time spent taking the survey.
Your response has been recorded.

If you have any questions about the project, please send an email to:
czarina-nale.robles@etu.hesge.ch

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Appendix 5: Survey Questions (Bahasa Indonesia)

Pendahuluan/Introduction

Halo,
kami sedang melakukan studi tentang Indonesia di Sekolah Administrasi Bisnis Jenewa di Swiss. Kami ingin meminta bantuan Anda dalam menyelesaikan hal-hal berikut kuesioner yang akan membawa Anda sekitar 5 menit dan peserta akan disimpan anonim. Survei ini tersedia dalam bahasa Inggris dan Bahasa Indonesia, Anda dapat mengubah bahasa menggunakan daftar drop-down kanan atas. Jika Anda menggunakan ponsel, posisi horizontal memberikan visibilitas yang lebih baik.

Jika Anda memiliki pertanyaan, silakan hubungi tim studi di alamat email berikut:
czarina-nale.robles@etu.hesge.ch.
Terima kasih banyak atas dukungan Anda.
Saya setuju, mulai belajar

*Hello,
We are conducting a study on Indonesia at the Geneva School of Business Administration in Switzerland. We would like to ask you for your assistance in completing the following questionnaire which will take you approximately 5 minutes and participants will be kept anonymous. The survey is available in English and Bahasa Indonesia, you may change the language using the top right drop-down list. If you use a mobile phone, the horizontal position provides better visibility.*

If you have any questions, please contact the study team at the following email address: czarina-nale.robles@etu.hesge.ch.

Thank you very much for your support.

Persepsi Swiss/Perception of Switzerland

Q2.1 Apa yang terlintas dalam pikiran Anda ketika Anda mendengar "Swiss"?

What comes to your mind when you hear "Switzerland"?

- 1.
- 2.
- 3.

Q2.2 Apa harapan Anda pada produk yang dibuat di Swiss? Apa yang memengaruhi Anda membeli satu? Harap tunjukkan maksimum respons 3.

What are your expectations of products made in Switzerland? What influences you on buying one? Please indicate a maximum of 3 responses.

Perilaku pembelian terhadap vitamin buatan Swiss/Purchasing behavior towards Swiss-made vitamins

Q3.1 Pernahkah Anda membeli suplemen vitamin buatan Swiss?

Have you ever bought vitamin supplements made in Switzerland?

- ☐ Ya /Yes
☐ Tidak/ No

Q3.2 Jenis suplemen vitamin apa yang Anda beli?

What type of vitamin supplements did you buy?

- ☐ Multivitamin
☐ Vitamin D
☐ Vitamin C

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- ☐ Vitamin E
☐ Lainnya

Q3.3 Apa yang mencegah Anda membeli suplemen vitamin buatan Swiss?

What did prevent you from buying Swiss-made vitamin supplements?

- ☐ Saya lebih suka suplemen vitamin buatan lokal / *I prefer locally-made vitamin supplements*
☐ Mereka lebih mahal / *They are more expensive*
☐ Saya tidak mengetahui vitamin buatan Swiss / *I am not aware of vitamins made in Switzerland*
☐ Lainnya / *Other*

Q3.4 Faktor apa yang akan Anda pertimbangkan ketika membeli vitamin buatan Swiss? Silakan pilih SEMUA itu berlaku.

What factors would you consider when buying Swiss-made vitamins? Please choose ALL that apply.

- ☐ Harga / *Price*
☐ Bahan / *Ingredients*
☐ Ketersediaan di seluruh Indonesia / *Availability across Indonesia*
☐ Merek / Produsen / *Brand/Manufacturer*
☐ Rekomendasi / Tinjauan / *Recommendation/Review*
☐ Pendapat ahli / *Expert opinion*
☐ Label (sertifikasi) / *Label (certification)*

Gaya hidup konsumen/*Consumer lifestyle*

Q4.1 Pernyataan umum tentang gaya hidup Anda secara keseluruhan.

Untuk setiap pernyataan, harap tunjukkan seberapa besar Anda secara pribadi setuju atau tidak setuju dengan mengikuti:

General statements about your overall lifestyle. For each statement, please indicate how much you personally agree or disagree with the following:

- ☐ Saya menjaga kesehatan dan kesejahteraan saya secara keseluruhan. / *I take care of my overall health and wellness.*
☐ Saya ingin menjalani gaya hidup sehat tetapi sering tidak memiliki disiplin. / *I wish to live a healthy lifestyle but often don't have discipline.*
☐ Saya ingin menjalani gaya hidup sehat tetapi seringkali tidak memiliki sarana atau sumber daya. / *I wish to live a healthy lifestyle but often don't have the means or resources.*
☐ Saya berhati-hati dalam penampilan saya. / *I take care of how I look.*

- Tanggapan untuk setiap baris/*Responses for each row :*
sangat tidak setuju/strongly disagree
agak tidak setuju/somewhat disagree
tidak setuju atau tidak setuju/neither disagree or agree
sangat setuju/strongly agree
agak setuju/somewhat agree

Pengguna suplemen vitamin/*Users of vitamin supplements*

Q5.1 Apakah Anda mengonsumsi suplemen vitamin?

Do you take any vitamin supplements?

- ☐ Iya / *Yes*
☐ Tidak / *No*

Q5.2 Jenis vitamin apa yang Anda pakai?

Which kind of vitamins are you taking?

- ☐ Multivitamin
☐ Vitamin D
☐ Vitamin C
☐ Vitamin E

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If the vitamins you take were from Indonesia, how much more (or less) you will be willing to pay (in percentage terms) for an equivalent vitamin Made in Switzerland?



Q5.9 Jika vitamin yang Anda ambil berasal dari Cina, berapa banyak lagi (atau kurang) yang akan Anda bayarkan (dalam persentase) untuk vitamin setara yang dibuat di Swiss?*

If the vitamins you take were from Cina, how much more (or less) you will be willing to pay (in percentage terms) for an equivalent vitamin Made in Switzerland?



s (consist of

Q5.10 Jika vitamin yang Anda ambil berasal dari Singapura, berapa banyak lagi (atau kurang) yang akan Anda bayarkan (dalam persentase) untuk vitamin setara yang dibuat di Swiss?*

If the vitamins you take were from Singapore, how much more (or less) you will be willing to pay (in percentage terms) for an equivalent vitamin Made in Switzerland?



that apply.

*dalam persentase (%) / In percentage

Non-pengguna suplemen vitamin /Non-users of vitamin supplements

Q6.1 Jika Anda tidak mengonsumsi vitamin, apa alasan paling penting Anda tidak mengonsumsi vitamin?

If you don't consume any vitamin supplements, what's the most important reason you don't?

- ☐ Saya memiliki gaya hidup sehat (melakukan aktivitas fisik, makan makanan seimbang) / I have a healthy lifestyle (do physical activities, eat a balanced diet)
- ☐ Vitamin mahal / Vitamins are expensive
- ☐ Saya tidak percaya mereka bekerja / I don't believe they work
- ☐ Takut akan efek samping / Fear of side effects
- ☐ Lainnya

lease pick only

Q6.2 Apa yang akan membuat Anda mengonsumsi suplemen vitamin?

What would make you consume vitamin supplements?

- ☐ Jika kesehatan saya memburuk / If my health is deteriorating
- ☐ Jika dokter saya merekomendasikan saya untuk mengonsumsi vitamin / If my doctor recommends me to take a vitamin
- ☐ Lainnya

that apply.

Pertanyaan Demografis / Demographic Questions

Q7.1 Berapa umurmu?

How old are you?

- ☐ Di bawah 18 / Under 18
- ☐ 18 - 24
- ☐ 25 - 34
- ☐ 35 - 44
- ☐ 45 - 54
- ☐ 55 - 64
- ☐ 65 atau lebih / 65 or older

nda bayarkan

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Q7.2 Apa jenis kelaminmu?

What is your gender?

- ☐ Laki-laki /Male
- ☐ Perempuan /Female
- ☐ Non-biner / ketiga gender /Non-binary / third gender

Q7.3 Di wilayah mana Anda tinggal?

Which region do you live in?

- ☐ Jawa
- ☐ Kalimantan
- ☐ Kepulauan Maluku /Maluku Islands
- ☐ Kepulauan Sunda Kecil /Lesser Sunda Islands
- ☐ Papua Barat /Western New Guinea
- ☐ Sulawesi
- ☐ Sumatra
- ☐ Di luar negeri /Abroad

Q7.4 Apa tingkat atau tingkat sekolah tertinggi yang telah Anda selesaikan?

What is the highest degree or level of school have you completed?

- ☐ Sekolah Dasar /Primary school
- ☐ Sekolah Menengah Atas/High school
- ☐ Gelar Sarjana /Bachelor's degree
- ☐ Gelar Master /Master's degree
- ☐ Lainnya /Other

Akhir Survei/End of Survey

Kami berterima kasih atas waktu yang Anda habiskan untuk mengikuti survei. Respons Anda telah direkam. Jika Anda memiliki pertanyaan tentang proyek ini, silakan kirim email ke: czarina-nale.robles@etu.hesge.ch

We thank you for your time spent taking the survey. Your response has been recorded. If you have any questions about the project, please send an email to: czarina-nale.robles@etu.hesge.ch

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Appendix 6: Class definitions in Indonesia (2016 per-capita consumption)

TABLE E.1

Class definitions (2016 per-capita consumption)

The middle class comprises those who have less than a 10 percent chance of being poor or vulnerable in the future, given their current consumption.

| Class | P | V | A M C | M C | U C |
|--|----------------------------------|---|--|--|--------------------|
| | Poor | Vulnerable | Aspiring Middle Class | Middle Class | Upper Class |
| Household status | Below national poverty line (PL) | >10 percent chance of being poor next year (1.0-1.5xPL) | <10 percent chance of being poor but >10 percent chance of being vulnerable (1.5-3.5xPL) | <10 percent chance of being poor or vulnerable (3.5-17xPL) | >17xPL |
| Per capita consumption —Rp is Monthly US\$* is daily | <Rp 354k <US\$2.20 | Rp 354-532k US\$2.20-3.30 | Rp 532k-1.2m US\$3.30-7.75 | Rp 1.2-6.0m US\$7.75-38 SUB-GROUPS: MC 1 (Rp 1.2-3.2m; US\$7.75-20); MC 2 (Rp 3.2-6.0m; US\$20-38) | >Rp 6m >US\$38 |

Note: Daily per capita consumption is measured in US\$PPP, which are US dollars adjusted for purchasing power parity across countries.

Source: Susenas and World Bank calculations.

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Appendix 7: Triangulation Process

| TRANSLATED VERSION (IND-ENG) | | | | LEMMATIZATION | | | CATEGORISATION | | |
|---------------------------------|--|--|----------------------------|-------------------|-----------------------|----------------------------|-------------------|---------------|--|
| Perception_1 | Perception_2 | Perception_3 | Perception_1 | Perception_2 | Perception_3 | Perception_1 | Perception_2 | Perception_3 | |
| Cheese | Sconery | Chocolates | cheese | sconery | chocolate | food | sconery | food | |
| Chocolate | Snow | Cold | chocolate | snow | weather | food | weather | weather | |
| chocolate | cheese | chocolate | chocolate | cheese | snow | food | food | weather | |
| Rich country | Banking | Nature (hills, waterfalls, etc.) | rich | bank | sconery | expensive | bank | sconery | |
| Beautiful country | Bank | ETH Zurich University | beauty | bank | education | sconery | bank | education | |
| beautiful place | beauty | peaceful | beauty | calm | peace | quality | quality | peaceful | |
| cheese | healthcare system | swiss people speak mostly German ? | cheese | healthcare | speak german? | food | healthcare | language | |
| Best country ever | Expensive | Beautiful | best country | expensive | beauty | country | expensive | sconery | |
| Democracy | Beautiful | Beautiful landscape | democracy | fondest | landscape | democracy | food | sconery | |
| Mountain | Nature | Beautiful | mountain | nature | beauty | sconery | sconery | sconery | |
| Nature | Mountain | Beautiful | nature | mountain | beauty | sconery | mountain | sconery | |
| snow | home of many UN bodies headquarters | expensive | snow | UN headquarters | expensive | weather | organization | expensive | |
| Geneva | Cold | Ski | Geneva | cold | ski | city | weather | sport | |
| watch | Europe | Mountain | watch | sconery | mountain | quality | Europe | mountain | |
| secure | chocolate | chocolate | secure | chocolate | watch | watch | quality | sconery | |
| Countries that are abroad | Beautiful country of sconery | watch brand | abroad | sconery | sconery | country | sconery | watch | |
| Beautiful nature | Nice | Snow | nature | nice | snow | sconery | quality | weather | |
| Chocolate | Cheese Fondue | Hadron Collider | chocolate | sconery | cheese fondue | food | food | science | |
| Expensive | Beautiful sconery | Neutral | expensive | sconery | neutral | sconery | neutral | neutral | |
| sconery | vacation | village | sconery | vacation | village | weather | tourism | city | |
| One of the countries in Western | Famous watch manufacturer | Quality Chocolate Manufacturer | Western Europe | watch | Chocolate | Europe | industry | industry | |
| Flightless city | Mountains | World | Flightless city | mountain | beauty | mountain | peaceful | peaceful | |
| Mountain | cheese | Beautiful | mountain | cheese | beauty | mountain | food | sconery | |
| Country | Snow | Chocolate | country | snow | chocolate | country | weather | food | |
| Modern Country | Europe | Modern Technology | modern country | Europe | modern technology | develop | develop | develop | |
| mountain | mountains | money/landings | mountain | money/landings | alp | food | family | watch | |
| Food | Family/friends | Alps | food | family/friend | alp | food | family | food | |
| Watch | Chocolate | Bank | watch | chocolate | bank | watch | food | bank | |
| Snow | Ski | Expensive | snow | ski | expensive | weather | ski | sconery | |
| rich | german and french side | chocolate | rich | side | chocolate | expensive | city | food | |
| chocolate | watch | mountain | chocolate | watch | mountain | Europe | watch | mountain | |
| Bank | Europe | First idyllic | bank | Europe | first idyllic | transportation | food | watch | |
| Train | Chocolate | Clock | train | chocolate | clock | transportation | food | watch | |
| swiss army | jam | swiss berlin | swiss army | jam | swiss berlin | Swiss army | food | food | |
| Cold | Europe | Developed country | Cold | Europe | develop | weather | weather | weather | |
| lake | sconery | beautiful nature | lake | sconery | nature | waterform | sconery | sconery | |
| Snow | Beautiful landscapes | Clean | snow | landscape | clean | weather | sconery | quality | |
| Cheese | Chocolate | Expensive | cheese | chocolate | expensive | food | food | expensive | |
| Mountain | Cheese | Chocolat | mountain | chocolate | chocolate | food | food | expensive | |
| Yacuzzi | swiss | chocolate | yacuzzi | bank | chocolate | tourism | bank | food | |
| Cold weather | Beautiful sconery | far | cold weather | beauty | far | weather | sconery | far | |
| beautiful country and beautiful | neutral | far local destination | beautiful | neutral | local destination | sconery | neutral | localism | |
| mountain | friendly people & friendly sconery | the dream of sconery elderly | mountain | friendly | dream | sconery | allure | dream | |
| peaceful sconery | peaceful sconery | Chocor | peaceful | peaceful | sconery | sconery | expensive | expensive | |
| Progression | Clean | Chocor | progression | clean | sconery | develop | quality | food | |
| A happy sconery | Consoling with no work from home | Duck of Bill Rindler Duck is the world | happy | no work from home | duck | allure | no work from home | peaceful | |
| Rapper Federe | Duck | Sconery mountain | Rapper Federe | duck | Sconery mountain | people | bank | mountain | |
| World Bank | Cold | Mountain | World Bank | cold | mountain | weather | bank | mountain | |
| Artistic | lean | Artistic | artistic | lean | artistic | tourism | tourism | sconery | |
| Scenic | Quality | Neutral | scenic | quality | neutral | quality | quality | neutral | |
| Beautiful sconery | Abundance | Abundance | beautiful | abundance | abundance | food | food | food | |
| Beautiful | Beautiful | friendly | beautiful | friendly | friendly | weather | weather | weather | |
| Peaceful | Green lead | peaceful | peaceful | green lead | milk | peaceful | sconery | food | |
| Alps | Valleys | Cous | alps | valley | ski | mountain | valley | sport | |
| Mountain | valley | Mountain | mountain | valley | ski | mountain | valley | weather | |
| Abundance | Not abundance | Sconery | abundance | abundance | sconery | food | weather | peaceful | |
| Mountain | Alpine | Mountain | mountain | alpine | mountain | quality | quality | quality | |
| Developed sconery | Progression sconery | Mountain | develop | progression | neutral | develop | develop | neutral | |
| Sconery | School of hospitality | English-French-German language | sconery | hospitality | English-French-German | weather | bank | language | |
| Chocor | Mountain | Mountain | chocor | mountain | mountain | food | weather | weather | |
| MT, Tiliu | Mountain | Chocor | mt, tiliu | mountain | abundance | mountain | sconery | food | |
| Real view | Sconery | Alps | real view | sconery | alp | sconery | weather | mountain | |
| sconery | beautiful | Mountain | sconery | beauty | mountain | weather | weather | mountain | |
| Chocolate | Alps | Amazing people | chocolate | alp | amazing people | mountain | mountain | allure | |
| Chocolate | Duck | Highker Chapiual | chocolate | bank | Highker Chapiual | food | bank | people | |
| Peaceful sconery | Neutral | Neutral | peaceful | neutral | neutral | peaceful | neutral | neutral | |
| Tabletaker | The view of the sconery | Chocolate | tableaker | sconery | chocolate | food | sconery | food | |
| Pharma | UN | Mountain | pharma | UN | mountain | industrial | international | mountain | |
| Isorian destination | high need of living | valleys industry | isorian | high living need | valleys | isorian | regression | valley | |
| European Union | Chocolate | Europe Union | European Union | chocolate | alp | Europe | food | mountain | |
| Germany | Peace | Germany | mountain | peace | Germany | sconery | quality | neutral | |
| Chocolate | Mountain | Chocor feeder | chocolate | mountain | chocor feeder | food | mountain | food | |
| Zerick | peace/love | The island sconery | Zerick | peace of Pina | valley | alp | peace of Pina | valley | |
| sconery | Beautiful sconery | Mountain | sconery | mountain | good food | weather | quality | quality | |
| Heavy | Beautiful mountains sconery | Good food | heavy | mountain | good food | bank | weather | quality | |
| Beautifully | Sconery | Better life | beautifully | sconery | better life | bank | weather | quality | |
| Valleys | Life | Life | valleys | life | valley | bank | weather | quality | |
| Rick | Neutral | Cold | rick | neutral | cold | regression | neutral | quality | |
| Beautiful place in a city | Walking people | In a city | beautifully people | chocolate | chocolate | isorian | allure | food | |
| A very nice sconery | Many people from all over the world keep their | Place of brandy goods | sofo | food | brandy goods | quality | bank | quality | |
| Chocolate | Good food | Beautiful city | chocolate | sconery | beauty | food | weather | sconery | |
| Cold | Isorian | Isorian | cold | beauty | bank | weather | sconery | bank | |
| Beautiful view | Optimal | Bank | beautifully | valley | regression | isorian | sconery | regression | |
| mountain | Mountain | Bank | mountain | chocolate | chocolate | mountain | food | bank | |
| rick | Mountain | Mountain | rick | Mountain | chocolate | bank | mountain | bank | |
| Chocolate | Abundance | Beautiful view | chocolate | abundance | valley | regression | develop | sconery | |
| Mountain (Swiss Alps) | Chocolate | Beautifully | mountain | valley | chocolate | bank | valley | sconery | |
| Chocolate | Duckling | Beautiful view | chocolate | bank | chocolate | food | bank | sconery | |
| alp | Isorian | Beautiful view | alp | isorian | chocolate | mountain | allure | allure | |
| Isorian | Swiss Bank | Swiss Bank | isorian | sconery | chocolate | isorian | weather | bank | |
| Mountain | Peace | River | mountain | peace | river | mountain | peaceful | waterform | |
| Duck | Mountain | Chocolate | bank | valley | chocolate | bank | sconery | food | |
| Nature | Mountain | Peace | weather | mountain | weather | mountain | peaceful | peaceful | |
| Mountain | Valley | Europe | mountain | valley | Europe | mountain | valley | Europe | |
| Mountain | Mountain | Education | chocolate | mountain | education | food | mountain | education | |
| Mikul | Swiss river | Druck | sconery | weather | chocolate | regression | sconery | quality | |
| Alps | Neutral Sconery | End Green | alp | neutral | End Green | mountain | neutral | international | |
| Mountain | Valleys | Chocolate | mountain | valley | chocolate | mountain | valley | food | |
| chocolate | Beautiful view | Expensive | chocolate | sconery | peace | food | sconery | regression | |
| Beautiful | Peace | Heavy | beautifully | peace | heavy | sconery | international | peaceful | |
| Peaceful place in the | Peaceful | Rapper Federe | peaceful | peaceful | Rapper Federe | peaceful | international | people | |
| European Union | Chocolate | Germany | European Union | chocolate | Germany | sconery | quality | quality | |
| Beautiful and Peaceful Sconery | Duck | Swiss | beautiful | bank | swiss | sconery | bank | bank | |
| sconery | mountain | Isorian | sconery | mountain | isorian | weather | weather | sconery | |
| Europe | Peace | Peace | Europe | peace | peace | bank | weather | food | |
| Real Heavy Sconery | Isorian | Heavy sconery | Heavy sconery | isorian | heavy | heavy | weather | heavy | |
| Beautiful natural sconery | Heavy Swiss people | Quiet Swiss life | Beautiful natural sconery | heavy | quiet Swiss life | sconery | allure | quiet | |
| Nature | Valley | Heavy | nature | valley | heavy | sconery | valley | food | |
| consoling with a very nice | Swiss people | Swiss people | consoling with a very nice | swiss people | swiss people | consoling with a very nice | swiss people | swiss people | |
| Looking up | Swiss people | Swiss people | looking up | swiss people | swiss people | looking up | swiss people | swiss people | |
| Chocolate in Europe | Cold sconery | Quiet sconery | chocolate in Europe | cold sconery | quiet sconery | chocolate in Europe | cold sconery | quiet sconery | |
| Beautiful Swiss Mountain | UN, WHO, etc | Mountain | Beautiful Swiss Mountain | un, who, etc | mountain | mountain | international | international | |
| chocolate | chocolate | chocolate | chocolate | chocolate | chocolate | mountain | international | international | |
| Beautiful | Beautiful | Beautiful | beautiful | beautiful | beautiful | mountain | international | international | |
| Peaceful place in the | Peaceful | Peaceful | peaceful place in the | peaceful | peaceful | peaceful place in the | peaceful | peaceful | |
| European Union | Chocolate | Germany | European Union | chocolate | Germany | sconery | quality | quality | |
| Beautiful and Peaceful Sconery | Duck | Swiss | beautiful | bank | swiss | sconery | bank | bank | |
| sconery | mountain | Isorian | sconery | mountain | isorian | weather | weather | sconery | |
| Europe | Peace | Peace | Europe | peace | peace | bank | weather | food | |
| Real Heavy Sconery | Isorian | Heavy sconery | Real Heavy Sconery | isorian | heavy | heavy | weather | heavy | |
| Beautiful natural sconery | Heavy Swiss people | Quiet Swiss life | Beautiful natural sconery | heavy | quiet Swiss life | sconery | allure | quiet | |
| Nature | Valley | Heavy | nature | valley | heavy | sconery | valley | food | |
| consoling with a very nice | Swiss people | Swiss people | consoling with a very nice | swiss people | swiss people | consoling with a very nice | swiss people | swiss people | |
| Looking up | Swiss people | Swiss people | looking up | swiss people | swiss people | looking up | swiss people | swiss people | |
| Chocolate in Europe | Cold sconery | Quiet sconery | chocolate in Europe | cold sconery | quiet sconery | chocolate in Europe | cold sconery | quiet sconery | |
| Beautiful Swiss Mountain | UN, WHO, etc | Mountain | Beautiful Swiss Mountain | un, who, etc | mountain | mountain | international | international | |
| chocolate | chocolate | chocolate | chocolate | chocolate | chocolate | mountain | international | international | |
| Beautiful | Beautiful | Beautiful | beautiful | beautiful | beautiful | mountain | international | international | |
| Peaceful place in the | Peaceful | Peaceful | peaceful place in the | peaceful | peaceful | peaceful place in the | peaceful | peaceful | |
| European Union | Chocolate | Germany | European Union | chocolate | Germany | sconery | quality | quality | |
| Beautiful and Peaceful Sconery | Duck | Swiss | beautiful | bank | swiss | sconery | bank | bank | |
| sconery | mountain | Isorian | sconery | mountain | isorian | weather | weather | sconery | |
| Europe | Peace | Peace | Europe | peace | peace | bank | weather | food | |
| Real Heavy Sconery | Isorian | Heavy sconery | Real Heavy Sconery | isorian | heavy | heavy | weather | heavy | |
| Beautiful natural sconery | Heavy Swiss people | Quiet Swiss life | Beautiful natural sconery | heavy | quiet Swiss life | sconery | allure | quiet | |
| Nature | Valley | Heavy | nature | valley | heavy | sconery | valley | food | |
| consoling with a very nice | Swiss people | Swiss people | consoling with a very nice | swiss people | swiss people | consoling with a very nice | swiss people | swiss people | |
| Looking up | Swiss people | Swiss people | looking up | swiss people | swiss people | looking up | swiss people | swiss people | |
| Chocolate in Europe | Cold sconery | Quiet sconery | chocolate in Europe | cold sconery | quiet sconery | chocolate in Europe | cold sconery | quiet sconery | |
| Beautiful Swiss Mountain | UN, WHO, etc | Mountain | Beautiful Swiss Mountain | un, who, etc | mountain | mountain | international | international | |
| chocolate | chocolate | chocolate | chocolate | chocolate | chocolate | mountain | international | international | |
| Beautiful | Beautiful | Beautiful | beautiful | beautiful | beautiful | mountain | international | international | |
| Peaceful place in the | Peaceful | Peaceful | peaceful place in the | peaceful | peaceful | peaceful place in the | peaceful | peaceful | |
| European Union | Chocolate | Germany | European Union | chocolate | Germany | sconery | quality | quality | |
| Beautiful and Peaceful Sconery | Duck | Swiss | beautiful | bank | swiss | sconery | bank | bank | |
| sconery | mountain | Isorian | sconery | mountain | isorian | weather | weather | sconery | |
| Europe | Peace | Peace | Europe | peace | peace | bank | weather | food | |
| Real Heavy Sconery | Isorian | Heavy sconery | Real Heavy Sconery | isorian | heavy | heavy | weather | heavy | |
| Beautiful natural sconery | Heavy Swiss people | Quiet Swiss life | Beautiful natural sconery | heavy | quiet Swiss life | sconery | allure | quiet | |
| Nature | Valley | Heavy | nature | valley | heavy | sconery | valley | food | |
| consoling with a very nice | Swiss people | Swiss people | consoling with a very nice | swiss people | swiss people | consoling with a very nice | swiss people | swiss people | |
| Looking up | Swiss people | Swiss people | looking up | swiss people | swiss people | looking up | swiss people | swiss people | |
| Chocolate in Europe | Cold sconery | Quiet sconery | chocolate in Europe | cold sconery | quiet sconery | chocolate in Europe | cold sconery | quiet sconery | |
| Beautiful Swiss Mountain | UN, WHO, etc | Mountain | Beautiful Swiss Mountain | un, who, etc | mountain | mountain | international | international | |
| chocolate | chocolate | chocolate | chocolate | chocolate | chocolate | mountain | international | international | |
| Beautiful | Beautiful | Beautiful | beautiful | beautiful | beautiful | mountain | international | international | |
| Peaceful place in the | Peaceful | Peaceful | peaceful place in the | peaceful | peaceful | peaceful place in the | peaceful | peaceful | |
| European Union | Chocolate | Germany | European Union | chocolate | Germany | sconery | quality | quality | |
| Beautiful and Peaceful Sconery | Duck | Swiss | beautiful | bank | swiss | sconery | bank | bank | |
| sconery | mountain | Isorian | sconery | mountain | isorian | weather | weather | sconery | |
| Europe | Peace | Peace | Europe | peace | peace | bank | weather | food | |
| Real Heavy Sconery | Isorian | Heavy sconery | Real Heavy Sconery | isorian | heavy | heavy | weather | heavy | |
| Beautiful natural sconery | Heavy Swiss people | Quiet Swiss life | Beautiful natural sconery | heavy | quiet Swiss life | sconery | allure | quiet | |
| Nature | Valley | Heavy | nature | valley | heavy | sconery | valley | food | |
| consoling with a very nice | Swiss people | Swiss people | consoling with a very nice | swiss people | swiss people | consoling with a very nice | swiss people | swiss people | |
| Looking up | Swiss people | Swiss people | looking up | swiss people | swiss people | looking up | swiss people | swiss people | |
| Chocolate in Europe | Cold sconery | Quiet sconery | chocolate in Europe | cold sconery | quiet sconery | chocolate in Europe | cold sconery | quiet sconery | |
| Beautiful Swiss Mountain | UN, WHO, etc | Mountain | Beautiful Swiss Mountain | un, who, etc | mountain | mountain | international | international | |
| chocolate | chocolate | chocolate | chocolate | chocolate | chocolate | mountain | international | international | |
| Beautiful | Beautiful | Beautiful | beautiful | beautiful | beautiful | mountain | international | international | |
| Peaceful place in the | Peaceful | Peaceful | peaceful place in the | peaceful | peaceful | peaceful place in the | peaceful | peaceful | |
| European Union | Chocolate | Germany | European Union | chocolate | Germany | sconery | quality | quality | |
| Beautiful and Peaceful Sconery | Duck | Swiss | beautiful | bank | swiss | sconery | bank | bank | |
| sconery | mountain | Isorian | sconery | mountain | isorian | weather | weather | sconery | |
| Europe | Peace | Peace | Europe | peace | peace | bank | weather | food | |
| Real Heavy Sconery | Isorian | Heavy sconery | Real Heavy Sconery | isorian | heavy | heavy | weather | heavy | |
| Beautiful natural sconery | Heavy Swiss people | Quiet Swiss life | Beautiful natural sconery | heavy | quiet Swiss life | sconery | allure | quiet | |
| Nature | Valley | Heavy | nature | valley | heavy | sconery | valley | food | |
| consoling with a very nice | Swiss people | Swiss people | consoling with a very nice | swiss people | swiss people | consoling with a very nice | swiss people | swiss people | |
| Looking up | Swiss people | Swiss people | looking up | swiss people | swiss people | looking up | swiss people | swiss people | |
| Chocolate in Europe | Cold sconery | Quiet sconery | chocolate in Europe | cold sconery | quiet sconery | chocolate in Europe | cold sconery | quiet sconery | |
| Beautiful Swiss Mountain | UN, WHO, etc | Mountain | Beautiful Swiss Mountain | un, who, etc | mountain | mountain | international | international | |
| chocolate | chocolate | chocolate | chocolate | chocolate | chocolate | mountain | international | international | |
| Beautiful | Beautiful | Beautiful | beautiful | beautiful | beautiful | mountain | international | international | |
| Peaceful place in the | | | | | | | | | |

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Appendix 8: Corpus Categories

| Category | Frequency | Frequency | Associated words |
|--------------------------|------------|-----------|---|
| food | 61 | 17% | Cheese, Cheese fondue, Fondue, Chocolate, Charcuterie, Milk, Hot chocolate, Toblerone |
| scenery | 50 | 14% | Nice land, View, Greenery, Nature, Trees, Natural beauty, Panorama, Beautiful scenery, Picturesque, Beautiful city, Beautiful mountains, Pretty, Beautiful, Beautiful Panoramas, Beautiful view |
| mountain | 38 | 11% | Snowy mountains, Mountain, Alps, Swiss Alps, Mt Titlis, Matterhorn |
| weather | 33 | 9% | Cold, Snow |
| bank | 23 | 6% | Bank, Bank of all the richest people in the world, World bank, Money, Storing funds, Secure banking |
| expensive | 15 | 4% | High living cost, expensive country, rich |
| watch | 14 | 4% | Watches, stopwatch, clock |
| quality | 13 | 4% | Calm, Clean, Serious, Quality, Safe |
| tourism | 11 | 3% | Vacation, Travel destination, Holiday, Tour, Tourism destination, To visit, Adventure |
| peaceful | 11 | 3% | Peaceful country, Peaceful, Peace |
| Europe | 10 | 3% | Europe, European Union, European country |
| citizen | 8 | 2% | Friendly people, Amazing people, blond, wealthy people, better life, happy people, quiet people |
| develop | 7 | 2% | Developed, Progressive, Prosperous, Advance |
| neutral | 7 | 2% | Neutral |
| city | 6 | 2% | Zurich, Geneva, Fairytale city, village |
| international organisati | 5 | 1% | UN, FIFA head office, WHO, Red Cross |
| industry | 5 | 1% | Swiss-watch producers, Watch manufacturers, Pharmaceutical, Agriculture, Chocolate manufacturer |
| waterform | 4 | 1% | Lake, River |
| hotel | 4 | 1% | Hotel, Hospitality school, Hospitality |
| famous swiss people | 3 | 1% | Roger Federer Stephane Chapuisat |
| sport | 3 | 1% | Ski, Skate |
| country | 3 | 1% | Country, Friendly country, Best country ever, Best country |
| education | 2 | 1% | education, university |
| language | 2 | 1% | English, French, German |
| cow | 2 | 1% | Cow |
| far | 2 | 1% | Far, Far away |
| Swiss army | 2 | 1% | Swiss Army |
| quiet | 2 | 1% | Quiet |
| valley | 1 | 0% | Valley |
| transportation | 1 | 0% | Train |
| healthcare | 1 | 0% | Healthcare system |
| first aid kit | 1 | 0% | First aid kit |
| science | 1 | 0% | Hadron Collider |
| democracy | 1 | 0% | Democracy |
| tower of Pisa | 1 | 0% | Tower of Pisa |
| no work from home | 1 | 0% | No work from home |
| sky | 1 | 0% | Sky |
| dream | 1 | 0% | Dream |
| best friend's country | 1 | 0% | Best friend's country |
| family | 1 | 0% | Family |
| heaven | 1 | 0% | Heaven |
| iceberg | 1 | 0% | Iceberg |
| | 360 | | |

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Appendix 9: Chi-squared test of non-users and users by gender

| Key |
|---------------------------|
| <i>frequency</i> |
| <i>expected frequency</i> |
| <i>chi2 contribution</i> |
| <i>row percentage</i> |
| <i>column percentage</i> |
| <i>cell percentage</i> |

| Gender | Vitamin consumption | | Total |
|--------|---------------------|--------|--------|
| | Non_users | users | |
| Female | 19 | 48 | 67 |
| | 21.8 | 45.2 | 67.0 |
| | 0.4 | 0.2 | 0.5 |
| | 28.36 | 71.64 | 100.00 |
| | 48.72 | 59.26 | 55.83 |
| | 15.83 | 40.00 | 55.83 |
| Male | 20 | 33 | 53 |
| | 17.2 | 35.8 | 53.0 |
| | 0.4 | 0.2 | 0.7 |
| | 37.74 | 62.26 | 100.00 |
| | 51.28 | 40.74 | 44.17 |
| | 16.67 | 27.50 | 44.17 |
| Total | 39 | 81 | 120 |
| | 39.0 | 81.0 | 120.0 |
| | 0.8 | 0.4 | 1.2 |
| | 32.50 | 67.50 | 100.00 |
| | 100.00 | 100.00 | 100.00 |
| | 32.50 | 67.50 | 100.00 |

Pearson chi2(1) = 1.1862 Pr = 0.276
Likelihood-ratio chi2(1) = 1.1825 Pr = 0.277

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Appendix 10: T-test of non-users and users by gender

Two-sample t test with equal variances

| Group | Obs | Mean | Std. err. | Std. dev. | [95% conf. interval] | |
|----------|-----|----------|-----------|-----------|----------------------|----------|
| Female | 67 | 3.716418 | .0554818 | .4541382 | 3.605645 | 3.827191 |
| Male | 53 | 3.622642 | .0672194 | .4893644 | 3.487756 | 3.757527 |
| Combined | 120 | 3.675 | .0429359 | .4703387 | 3.589983 | 3.760017 |
| diff | | .0937764 | .0863975 | | -.0773142 | .264867 |

```
diff = mean(Female) - mean(Male)          t = 1.0854
H0: diff = 0                               Degrees of freedom = 118
```

| | | |
|---------------------------|-------------------------------|---------------------------|
| Ha: diff < 0 | Ha: diff != 0 | Ha: diff > 0 |
| Pr(T < t) = 0.8600 | Pr(T > t) = 0.2800 | Pr(T > t) = 0.1400 |

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Appendix 11: Chi-squared test of non-users and users by region

| Key |
|---------------------------|
| <i>frequency</i> |
| <i>expected frequency</i> |
| <i>chi2 contribution</i> |
| <i>row percentage</i> |
| <i>column percentage</i> |
| <i>cell percentage</i> |

| Region | Vitamin consumption | | Total |
|----------------------|---------------------|--------|--------|
| | Non_users | users | |
| Abroad | 9 | 11 | 20 |
| | 6.5 | 13.5 | 20.0 |
| | 1.0 | 0.5 | 1.4 |
| | 45.00 | 55.00 | 100.00 |
| | 23.08 | 13.58 | 16.67 |
| | 7.50 | 9.17 | 16.67 |
| Java | 25 | 58 | 83 |
| | 27.0 | 56.0 | 83.0 |
| | 0.1 | 0.1 | 0.2 |
| | 30.12 | 69.88 | 100.00 |
| | 64.10 | 71.60 | 69.17 |
| | 20.83 | 48.33 | 69.17 |
| Lesser Sunda Islands | 5 | 6 | 11 |
| | 3.6 | 7.4 | 11.0 |
| | 0.6 | 0.3 | 0.8 |
| | 45.45 | 54.55 | 100.00 |
| | 12.82 | 7.41 | 9.17 |
| | 4.17 | 5.00 | 9.17 |
| Maluku Islands | 0 | 1 | 1 |
| | 0.3 | 0.7 | 1.0 |
| | 0.3 | 0.2 | 0.5 |
| | 0.00 | 100.00 | 100.00 |
| | 0.00 | 1.23 | 0.83 |
| | 0.00 | 0.83 | 0.83 |
| Sumatra | 0 | 5 | 5 |
| | 1.6 | 3.4 | 5.0 |
| | 1.6 | 0.8 | 2.4 |
| | 0.00 | 100.00 | 100.00 |
| | 0.00 | 6.17 | 4.17 |
| | 0.00 | 4.17 | 4.17 |
| Total | 39 | 81 | 120 |
| | 39.0 | 81.0 | 120.0 |
| | 3.6 | 1.7 | 5.4 |
| | 32.50 | 67.50 | 100.00 |
| | 100.00 | 100.00 | 100.00 |
| | 32.50 | 67.50 | 100.00 |

Pearson chi2(4) = 5.3691 Pr = 0.251
Likelihood-ratio chi2(4) = 7.0833 Pr = 0.132

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Appendix 12: T-test of non-users and users by region

Two-sample t test with equal variances

| Group | Obs | Mean | Std. err. | Std. dev. | [95% conf. interval] | |
|----------|-----|-----------|-----------|-----------|----------------------|----------|
| 0 | 37 | 3.621622 | .0808304 | .4916724 | 3.45769 | 3.785553 |
| 1 | 83 | 3.698795 | .0506639 | .4615705 | 3.598008 | 3.799582 |
| Combined | 120 | 3.675 | .0429359 | .4703387 | 3.589983 | 3.760017 |
| diff | | -.0771736 | .0930964 | | -.2615298 | .1071827 |

diff = mean(0) - mean(1) t = -0.8290
H0: diff = 0 Degrees of freedom = 118
Ha: diff < 0 Ha: diff != 0 Ha: diff > 0
Pr(T < t) = 0.2044 Pr(|T| > |t|) = 0.4088 Pr(T > t) = 0.7956

. ttest Non_Users, by(nb_region)

Two-sample t test with equal variances

| Group | Obs | Mean | Std. err. | Std. dev. | [95% conf. interval] | |
|----------|-----|----------|-----------|-----------|----------------------|----------|
| 0 | 37 | .3783784 | .0808304 | .4916724 | .2144466 | .5423101 |
| 1 | 83 | .3012048 | .0506639 | .4615705 | .2004181 | .4019915 |
| Combined | 120 | .325 | .0429359 | .4703387 | .2399827 | .4100173 |
| diff | | .0771736 | .0930964 | | -.1071827 | .2615298 |

diff = mean(0) - mean(1) t = 0.8290
H0: diff = 0 Degrees of freedom = 118
Ha: diff < 0 Ha: diff != 0 Ha: diff > 0
Pr(T < t) = 0.7956 Pr(|T| > |t|) = 0.4088 Pr(T > t) = 0.2044

. ttest Users, by(nb_region)

Two-sample t test with equal variances

| Group | Obs | Mean | Std. err. | Std. dev. | [95% conf. interval] | |
|----------|-----|-----------|-----------|-----------|----------------------|----------|
| 0 | 37 | .6216216 | .0808304 | .4916724 | .4576899 | .7855534 |
| 1 | 83 | .6987952 | .0506639 | .4615705 | .5980085 | .7995819 |
| Combined | 120 | .675 | .0429359 | .4703387 | .5899827 | .7600173 |
| diff | | -.0771736 | .0930964 | | -.2615298 | .1071827 |

diff = mean(0) - mean(1) t = -0.8290
H0: diff = 0 Degrees of freedom = 118

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Appendix 13: Chi-squared test of non-users and users by educational attainment

| Key |
|---------------------------|
| <i>frequency</i> |
| <i>expected frequency</i> |
| <i>chi2 contribution</i> |
| <i>row percentage</i> |
| <i>column percentage</i> |
| <i>cell percentage</i> |

| Education | Vitamin consumption | | Total |
|-------------------|---------------------|--------|--------|
| | Non_users | users | |
| Bachelor's degree | 7 | 18 | 25 |
| | 8.1 | 16.9 | 25.0 |
| | 0.2 | 0.1 | 0.2 |
| | 28.00 | 72.00 | 100.00 |
| | 17.95 | 22.22 | 20.83 |
| | 5.83 | 15.00 | 20.83 |
| High school | 4 | 3 | 7 |
| | 2.3 | 4.7 | 7.0 |
| | 1.3 | 0.6 | 1.9 |
| | 57.14 | 42.86 | 100.00 |
| | 10.26 | 3.70 | 5.83 |
| | 3.33 | 2.50 | 5.83 |
| Master's degree | 18 | 37 | 55 |
| | 17.9 | 37.1 | 55.0 |
| | 0.0 | 0.0 | 0.0 |
| | 32.73 | 67.27 | 100.00 |
| | 46.15 | 45.68 | 45.83 |
| | 15.00 | 30.83 | 45.83 |
| PhD | 9 | 23 | 32 |
| | 10.4 | 21.6 | 32.0 |
| | 0.2 | 0.1 | 0.3 |
| | 28.13 | 71.88 | 100.00 |
| | 23.08 | 28.40 | 26.67 |
| | 7.50 | 19.17 | 26.67 |
| Primary school | 1 | 0 | 1 |
| | 0.3 | 0.7 | 1.0 |
| | 1.4 | 0.7 | 2.1 |
| | 100.00 | 0.00 | 100.00 |
| | 2.56 | 0.00 | 0.83 |
| | 0.83 | 0.00 | 0.83 |
| Total | 39 | 81 | 120 |
| | 39.0 | 81.0 | 120.0 |
| | 3.1 | 1.5 | 4.5 |
| | 32.50 | 67.50 | 100.00 |
| | 100.00 | 100.00 | 100.00 |
| | 32.50 | 67.50 | 100.00 |

Pearson chi2(4) = 4.5259 Pr = 0.339
Likelihood-ratio chi2(4) = 4.5614 Pr = 0.335

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Appendix 14: One-Way ANOVA of non-users and users by educational attainment

| Nb_educatio n | Summary of Vitamin consumption | | | | |
|------------------|--------------------------------|-----------|-------|--|--|
| | Mean | Std. dev. | Freq. | | |
| 1 | 3 | 0 | 1 | | |
| 2 | 3.4285714 | .53452248 | 7 | | |
| 3 | 3.72 | .45825757 | 25 | | |
| 4 | 3.6727273 | .47354242 | 55 | | |
| 5 | 3.71875 | .45680341 | 32 | | |
| Total | 3.675 | .47033869 | 120 | | |

| Source | Analysis of variance | | | F | Prob > F |
|----------------|----------------------|-----|------------|------|----------|
| | SS | df | MS | | |
| Between groups | .992873377 | 4 | .248218344 | 1.13 | 0.3474 |
| Within groups | 25.3321266 | 115 | .220279362 | | |
| Total | 26.325 | 119 | .221218487 | | |

Bartlett's equal-variances test: $\chi^2(3) = 0.2938$ Prob> $\chi^2 = 0.961$

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Appendix 15: Chi-squared test of non-users and users by age

| Key | | | |
|---------------------------|--|--|--|
| <i>frequency</i> | | | |
| <i>expected frequency</i> | | | |
| <i>chi2 contribution</i> | | | |
| <i>row percentage</i> | | | |
| <i>column percentage</i> | | | |
| <i>cell percentage</i> | | | |

| Age | Vitamin consumption | | Total |
|--------------|---------------------|--------|--------|
| | Non_users | users | |
| 25 - 34 | 10 | 17 | 27 |
| | 8.8 | 18.2 | 27.0 |
| | 0.2 | 0.1 | 0.3 |
| | 37.04 | 62.96 | 100.00 |
| | 25.64 | 20.99 | 22.50 |
| | 8.33 | 14.17 | 22.50 |
| 35 - 44 | 11 | 22 | 33 |
| | 10.7 | 22.3 | 33.0 |
| | 0.0 | 0.0 | 0.0 |
| | 33.33 | 66.67 | 100.00 |
| | 28.21 | 27.16 | 27.50 |
| | 9.17 | 18.33 | 27.50 |
| 45 - 54 | 5 | 17 | 22 |
| | 7.2 | 14.8 | 22.0 |
| | 0.6 | 0.3 | 1.0 |
| | 22.73 | 77.27 | 100.00 |
| | 12.82 | 20.99 | 18.33 |
| | 4.17 | 14.17 | 18.33 |
| Under 24 | 6 | 7 | 13 |
| | 4.2 | 8.8 | 13.0 |
| | 0.7 | 0.4 | 1.1 |
| | 46.15 | 53.85 | 100.00 |
| | 15.38 | 8.64 | 10.83 |
| | 5.00 | 5.83 | 10.83 |
| 55 and above | 7 | 18 | 25 |
| | 8.1 | 16.9 | 25.0 |
| | 0.2 | 0.1 | 0.2 |
| | 28.00 | 72.00 | 100.00 |
| | 17.95 | 22.22 | 20.83 |
| | 5.83 | 15.00 | 20.83 |
| Total | 39 | 81 | 120 |
| | 39.0 | 81.0 | 120.0 |
| | 1.7 | 0.8 | 2.6 |
| | 32.50 | 67.50 | 100.00 |
| | 100.00 | 100.00 | 100.00 |
| | 32.50 | 67.50 | 100.00 |

| | | | |
|------------------|-----------|--------|------------|
| Pearson | chi2(4) = | 2.5571 | Pr = 0.634 |
| Likelihood-ratio | chi2(4) = | 2.5605 | Pr = 0.634 |

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Appendix 16: One-Way ANOVA of non-users and users by age

| Nb_age | Summary of Vitamin consumption | | |
|--------|--------------------------------|-----------|-------|
| | Mean | Std. dev. | Freq. |
| 1 | 3.5384615 | .51887452 | 13 |
| 2 | 3.6296296 | .49210288 | 27 |
| 3 | 3.6666667 | .47871355 | 33 |
| 4 | 3.7727273 | .42893203 | 22 |
| 5 | 3.72 | .45825757 | 25 |
| Total | 3.675 | .47033869 | 120 |

| Source | Analysis of variance | | | F | Prob > F |
|----------------|----------------------|-----|------------|------|----------|
| | SS | df | MS | | |
| Between groups | .560964776 | 4 | .140241194 | 0.63 | 0.6449 |
| Within groups | 25.7640352 | 115 | .224035089 | | |
| Total | 26.325 | 119 | .221218487 | | |

Bartlett's equal-variances test: $\chi^2(4) = 0.7217$ Prob> $\chi^2 = 0.949$

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Appendix 17: Probit regression model

Iteration 0: log likelihood = -75.669723
 Iteration 1: log likelihood = -73.430166
 Iteration 2: log likelihood = -73.425944
 Iteration 3: log likelihood = -73.425944

Probit regression

Number of obs = 120
 LR chi2(4) = 4.49
 Prob > chi2 = 0.3440
 Pseudo R2 = 0.0297

Log likelihood = -73.425944

| nb_vitamin_consumption | Coefficient | Std. err. | z | P> z | [95% conf. interval] | |
|------------------------|-------------|-----------|-------|-------|----------------------|----------|
| nb_gender | .3330655 | .2457714 | 1.36 | 0.175 | -.1486376 | .8147685 |
| nb_region | .1495956 | .2644719 | 0.57 | 0.572 | -.3687598 | .667951 |
| nb_education | .0991701 | .1517588 | 0.65 | 0.513 | -.1982717 | .396612 |
| nb_age | .1071879 | .1068017 | 1.00 | 0.316 | -.1021396 | .3165154 |
| _cons | -.5483472 | .5810536 | -0.94 | 0.345 | -1.687191 | .5904969 |

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Appendix 18: T-test of Indonesia vs Switzerland

One-sample t test

| Variable | Obs | Mean | Std. err. | Std. dev. | [95% conf. interval] | |
|----------|-----|---------|-----------|-----------|----------------------|----------|
| IND_CH | 81 | 15.8642 | 2.121521 | 19.09369 | 11.64224 | 20.08616 |

```
mean = mean(IND_CH)          t = 7.4777
H0: mean = 0                Degrees of freedom = 80
```

| | | |
|--------------------|------------------------|--------------------|
| Ha: mean < 0 | Ha: mean != 0 | Ha: mean > 0 |
| Pr(T < t) = 1.0000 | Pr(T > t) = 0.0000 | Pr(T > t) = 0.0000 |

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Appendix 19: T-test of China vs Switzerland

One-sample t test

| Variable | Obs | Mean | Std. err. | Std. dev. | [95% conf. interval] | |
|----------|-----|----------|-----------|-----------|----------------------|----------|
| CHN_CH | 81 | 4.481481 | 2.670316 | 24.03285 | -.8326176 | 9.795581 |

```
mean = mean(CHN_CH)          t = 1.6783
H0: mean = 0                 Degrees of freedom = 80
```

| Ha: mean < 0 | Ha: mean != 0 | Ha: mean > 0 |
|--------------------|------------------------|--------------------|
| Pr(T < t) = 0.9514 | Pr(T > t) = 0.0972 | Pr(T > t) = 0.0486 |

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Appendix 20: T-test of Singapore vs Switzerland

One-sample t test

| Variable | Obs | Mean | Std. err. | Std. dev. | [95% conf. interval] | |
|----------|-----|----------|-----------|-----------|----------------------|----------|
| SG_CH | 81 | 9.555556 | 2.054354 | 18.48919 | 5.467261 | 13.64385 |

mean = mean(SG_CH) t = 4.6514
H0: mean = 0 Degrees of freedom = 80

Ha: mean < 0 Ha: mean != 0 Ha: mean > 0
Pr(T < t) = 1.0000 Pr(|T| > |t|) = 0.0000 Pr(T > t) = 0.0000

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