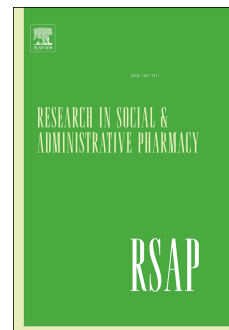


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Marketing activity in the community pharmacy sector - a scoping review.

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Abstract

Background: Community pharmacy ownership requires engaging with marketing strategies to influence consumer behaviour. There is a plethora of information from trade journals, expert opinion, and published discussion surrounding this issue. Despite this, evidence relating to the efficacy of marketing activity within the pharmacy sector is scant.

Objectives: To review how marketing activity has been conceptualised in the community pharmacy sector and to determine the evidence for the effect of marketing activity.

Methods: Seven databases were systematically searched using a scoping review framework with the reporting protocol of PRISMA-P. The search yielded 33 studies that were analysed for year of publication, journal, country of focus, and framework of marketing.

Results: The majority of marketing research papers focused on the United States and were published in healthcare journals. These were various marketing strategy elements, including; segmentation, targeting, differentiation, and positioning. Also evident was research regarding marketing mix, which predominately involved the “4Ps” model. Actual marketing activity comprised little of the research.

Conclusions: Research into marketing activity in community pharmacy is limited, and little evidence is available to show the effects of such activities. Future research needs to demonstrate the causality for the effect of marketing activities on consumer behaviour and economic outcomes.

Keywords

community pharmacy, retailing, marketing strategies, marketing mix, marketing activities, marketing outcomes

Introduction

Marketing activities are pivotal for the successful implementation of a new product or services into the market.^{1,2} Community pharmacies can use marketing activities to bridge the divide between themselves and their potential market. In many countries, community pharmacies provide medications as well as professional healthcare services to the public. It would then be important to ensure that the public is aware of what the community pharmacy provides. This is not restricted to the Australian market; pharmacies worldwide also require marketing to their market base.

The regulation of the community pharmacy sector varies widely between countries and jurisdictions. In the U.S., there is a relatively deregulated and privatised system whereby ownership of a pharmacy is not restricted to a pharmacist.³ In the United Kingdom, only a pharmacist or a body corporate under the responsibility of a pharmacist may register a pharmacy, yet non-pharmacists are able to have a pecuniary interest.^{4, 5} In Australia, only a pharmacist may have a pecuniary interest in a pharmacy.⁶ Yet, in other countries such as Denmark, all pharmacies are owned by the Association of Danish pharmacies controlled by the state.⁷ Despite such diversity in community pharmacy regulatory models, the underlying role of providing medications and services remains constant. This role relies fundamentally on consumer patronage. Consumer patronage is the intentions of consumers to visit a pharmacy, this behaviour by consumers is crucial for continued function of the pharmacy business.

Pharmacy businesses target marketing activities towards their potential consumer base. Marketing is the “activity, set of institutions, and processes for creating, communicating, delivering, and exchanging offerings that have value for customers, clients, partners, and society at large”.⁸ Part of the marketing process is the development of an integrated marketing plan to deliver an intended value to its target market.¹ As such, pharmacy businesses can adjust elements of the marketing mix to develop value for their customers.¹ Marketing to a customer base to influence their behaviour is done so as to meet an objective.^{1,9} Often, the objective is the generation of revenue.

Marketing strategies are designed as a set stimuli to influence the behaviours of consumers.⁹ Consumer behaviour can be defined as the overt actions of consumers or the “behaviour of the consumer or decision maker in the market place of products and services”.⁸ To market to consumers, businesses need to measure

the influences of consumer behaviour, which can be achieved through consumer-related measures. An example of a consumer-related measure is patient satisfaction; however, despite multiple patient satisfaction measures for community pharmacy, there is limited work on how marketing strategies influence satisfaction or consumer behaviour.¹⁰

The demand for understanding marketing activity in pharmacy can be seen with the initial concentration of publications from the late 1980s. These changes corresponded to the regulatory changes in the market, the dynamics of community pharmacies in the U.S. and especially to new entrants such as supermarkets and mass merchandisers in the early 1980's.^{11,12} Many trade journals published expert opinion on various elements of marketing strategies at this time.¹³⁻¹⁹ The rise of competitors during the late 1980s caused traditional pharmacies to reflect upon their status in the market and how to compete with such new entrants.

Singleton and Nissen suggest that to advance and survive in a hypercompetitive market, pharmacies can adopt a differentiation strategy.²⁰ However, as most of these articles are opinion pieces or commentary, there is limited evidence to corroborate when or how these opinions on pharmacy marketing activities affect behaviour and outcomes.

Objective

Despite the likely importance of marketing on consumer behaviour, there is limited attention paid to, or research regarding, the marketing activities of community pharmacies. As such, the aim of this scoping review was to explore how marketing activity has been conceptualised in the community pharmacy sector and to describe evidence for the effect of marketing.

Methods

To identify the evidence for marketing activities, a scoping review was chosen, as it provides the opportunity to perform conceptual mapping of the research field.²¹⁻²³ To investigate evidence-based literature supporting this topic, a systematic scoping review was undertaken, with the addition of evidence appraisal.²⁴⁻²⁶ While scoping reviews typically do not assess quality of evidence,²⁴⁻²⁶ evidence appraisal was performed using the National Health and Research Medical Council (NHMRC) guidelines.²⁷ Specifically, to perform a systematic scoping map of the evidence, Levac and colleagues²⁶ adaption of Arskey and Malley's scoping review

framework²⁴ was combined with the reporting protocol of PRISMA-P²⁸ and evidence appraisal using NHMRC guidelines.²⁷

Information Sources

An extensive search for all date ranges up to May 2016 was conducted through 7 search databases which were; PubMed, Embase, PsycINFO via OvidSP, IPA (International Pharmaceutical Abstracts), ProQuest Central, Business Source Premier and Emerald Insight. Examination of the references of included articles was performed as well as screening of personal libraries of the authors.

Search Strategy

Search terms were carried out in 2 concept groups, as seen in Table 1. The first concept group explored different marketing strategies that may be currently used and contained the terms; market* servic* OR market* advertis* OR market* promot* OR market* strateg* OR market* position* OR market* mix* OR market* segment* OR market* approach. The second concept group was to make the search results industry specific to community pharmacy and contained the terms; pharmacy OR pharmacist OR chemist.

TABLE 1: CONCEPTS AND TERMS USED IN SEARCH STRATEGY

First Concept	Second Concept
"market* servic*" OR	"pharmacy" OR
"market* advertis*" OR	"pharmacist" OR
"market* promot*" OR	"chemist"
"market* strateg*" OR	
"market* position*" OR	
"market* mix*" OR	
"market* segment*" OR	
"market* approach"	

Study Selection

As summarised in Table 2, studies were chosen based on the following eligibility criteria:

- The article had, as part of the subject of the study, included community pharmacy, whether as the central topic or as part of its subject. Community pharmacy was described as pharmacies that utilised a retail aspect to their business function. Hospital pharmacies and pharmaceutical industry were excluded from this study. Online pharmacies were considered an extension of community pharmacy and therefore were included in the study. Studies which discussed marketing to a population with specific disease state, e.g. a diabetes intervention, were excluded from this study. It was not intended to appraise the work of individual interventions, but rather the marketing activities that are conducted overall.
- To be included, studies had to discuss marketing as part of their topic. This, by extension included topics such as the marketing mix, marketing strategies, and advertising/promotions.
- In the search strategy, a restriction of peer-review was placed in order to filter a high number of articles, and in order to find evidence-based research. Yet, considering the nature of a scoping review, articles were chosen from not only scholarly publications, but also from trade journals and publications.
- Only studies in English were selected.
- The articles were also reviewed for the level of evidence they contained. The evidence guideline utilised was from the National Health and Medical Research Council (NHMRC) and based on the evidence hierarchy it provides.²⁷ Articles with level 4 evidence (defined as studies with an experimental design, e.g. case series with either a post-test or pre/post-test outcome) or higher were selected for inclusion. Studies that were level 5 (expert opinions) were excluded.

TABLE 2: INCLUSION CRITERIA USED TO SELECT ARTICLES FOR DATA EXTRACTION

Subject:	
	Community Pharmacy
Topic:	
	Marketing Activities

	<i>Including (or)</i>
	Marketing Mix
	Marketing Strategies
	Advertisement/Promotions
How:	
	English Language
	Peer Reviewed
	<i>Including (or)</i>
	Scholarly Texts
	Trade Journals/Professional Publications
	Evidenced research

Data Collection

Articles were selected using the above criteria by the first author AM. In the event of uncertainty of selection, the author CS would review the article and provide a decision. To be as inclusive as possible in the nature of a scoping review, abstract only and conference notes were included in the selection if they met the inclusion criteria, whereas title only articles were excluded.

Data Items – Conceptual Framework

Data extraction focused on providing information on year of publication, journal, the country, a framework of marketing and brief description. A conceptual framework was used to categorise included articles which was adapted from the textbooks by Levens² and Kotler and colleagues¹ as presented in Figure 1. The marketing mix model used was the 7P model from Booms and Bitner.²⁹ The 7P model of marketing is the 4P model (product, price, place, promotion) with the addition of 3 other elements specific to service industries (people, physical evidence, and process). A brief description was written in order to describe the intent of the article.



FIGURE 1: THE RELATIONSHIP OF MARKETING MIX (7P MODEL) AND MARKETING STRATEGY TO ACHIEVING MARKETING OBJECTIVES ADAPTED FROM LEVENS,² AND KOTLER AND COLLEAGUES.¹

Results

The literature search process is illustrated in Figure 2. From the 7 databases, a total of 2184 articles were retrieved. A further 11 articles were identified from searches through the references of eligible articles and 2 more from personal libraries. After the removal of duplicates, screening of titles and abstracts, and full-text examination, 33 studies met the inclusion criteria. The information synthesis is summarised in Table 3. The table displays the year of publication, journal, the country, a framework of marketing and a brief description. It is organised by increasing year of publication.

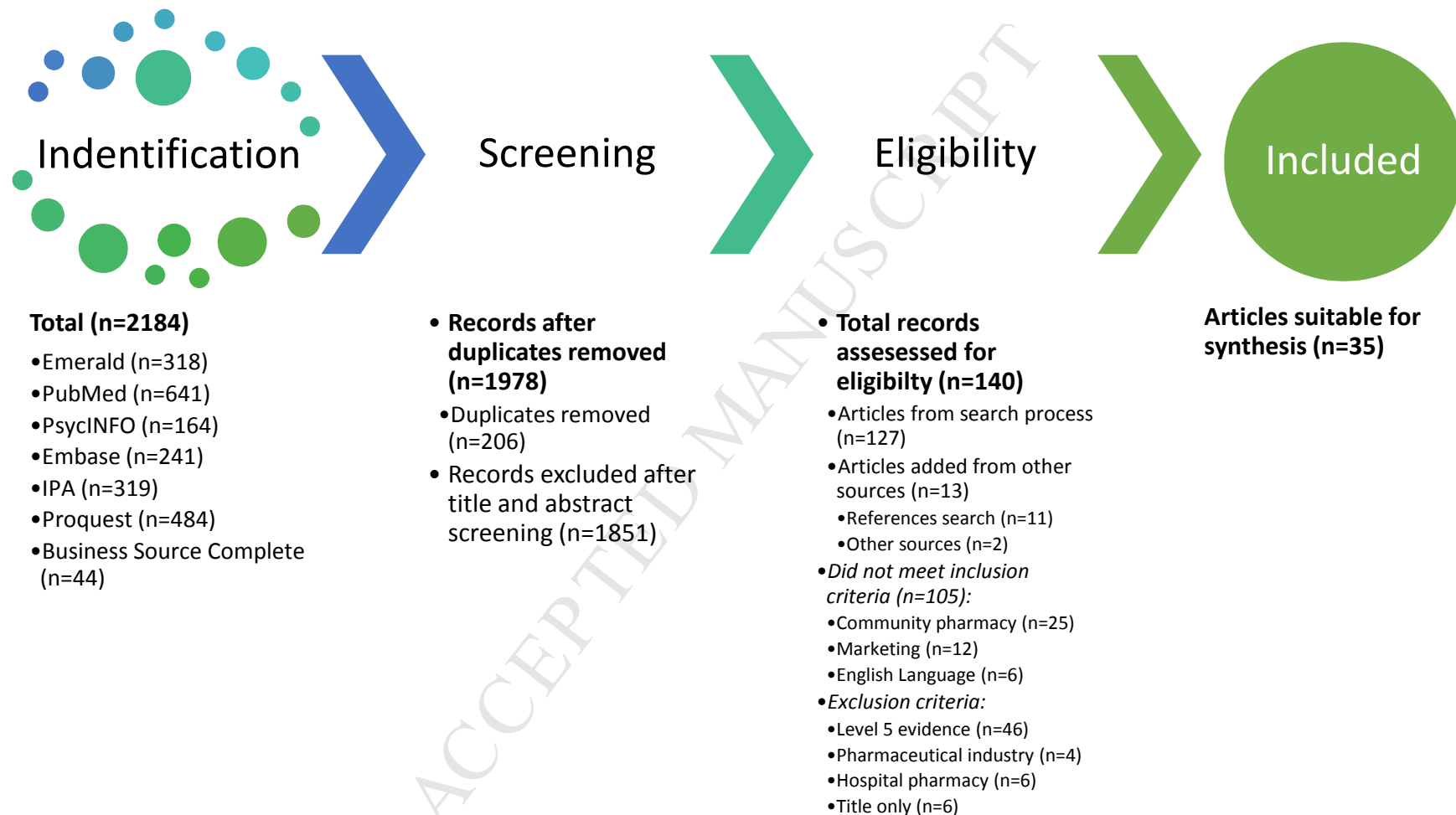


FIGURE 2: SEARCH FLOW PROCESS

TABLE 3: ARTICLES INCLUDED IN THIS REVIEW FOR SYNTHESIS

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
<i>Gagnon, J. P. (1977)³⁰</i>	Journal of the American Pharmaceutical Association	Literature Review	Marketing Strategy	A literature review on the factors affecting pharmacy patronage motives. Factors discussed are type of pharmacy, consumer demographic characteristics, length of residency, consumer dollar volume expended, town size, frequency of prescription purchase, type of drug prescribed and prescription price.
<i>Stewart, J. E., et al. (1977)³¹</i>	Journal of the American Pharmaceutical Association	United States	Segmentation	A cross-sectional study analysing the responses of a self-administered questionnaire on behaviours and attitudes of community pharmacy consumers compared to interviews performed with community pharmacy pharmacists. The authors aimed to identify factors that were important for choosing a pharmaceutical services and if consumer patronage was based on the desired services. Pharmacists were able to perceive those factors important to consumers in their choice of pharmacy. However, price was overestimated and location underestimated by pharmacists.
<i>Nickel, P. and A. I. Wertheimer (1979)³²</i>	Journal of Retailing	United States	Segmentation	A cross-sectional study providing community pharmacy consumers with a self-administered survey, to show their behaviours and attitudes for drugstore choice is affected by interrelated variables. Responses indicate that the age of the consumer, the consumption level of prescribed drugs, patron selection criteria and the type of retail/community pharmacy patronized affect one's image of community pharmacies.
<i>Zelnio, R. N.</i>	Pharmacy	United States	Differentiation	A cross-sectional study that distributed a self-administered questionnaire to community pharmacy

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
<i>and J. P. Gagnon (1979)³³</i>	Management	States	Positioning	consumers on order to develop a quantitative measure of community pharmacy image to design retail marketing strategies. Results concluded that the differential patronage could be explained by the image measurements and that these image measures do not vary significantly with respondent characteristics.
<i>Carroll, N. V. and J. P. Gagon[sic] (1983)³⁴</i>	Journal of Health Care Marketing	United States	Segmentation	This cross-sectional study presents the application of conjoint and cluster analysis to identify and describe consumer segments in ambulatory care pharmacies. The authors identify 5 distinct segments in the market and between these segments, significant demographic differences and substantial differences in sales potential exist amongst the segments.
<i>Carroll, N. V. and A. W. Jowdy (1987)¹¹</i>	Journal of Pharmaceutical Marketing and Management	United States	Segmentation	This cross-sectional study performed consumer interviews as patrons exited a pharmacy to investigate the patronage motives and demographics of 3 segments - independent pharmacy patrons, chain pharmacy patrons and consumers having no usual pharmacy. The authors identified that demographic characteristics varied with pharmacy type and motive factors varied based on the type of pharmacy.
<i>Lipowski, E. E. and J. B. Wiederholt (1987)³⁵</i>	Journal of Pharmaceutical Marketing and Management	United States	Differentiation Positioning	As part of the scale development process, to develop and evaluate the reliability validity of a measure of retail pharmacy image. Nine factors were classified as personnel, merchandise selection, physical features, locational convenience, advertising, reputation, retail services and emergency services.

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
<i>Lindauer, K. D. and B. D. Breland (1988)</i> ³⁶	ASHP Midyear Clinical Meeting	United States	Marketing Strategy Marketing Objectives	In this abstract they express their intent to measure physicians' perceptions of current pharmacy services and to develop a marketing plan to increase awareness and enhance utilization of pharmacy services in the future.
<i>Nagasawa, M., et al. (1989)</i> ³⁷	Journal of Pharmaceutical Marketing and Management	United States	Targeting	A cross-sectional study with a mail out self-administered survey to community pharmacists to assess their attitudes toward the shift of drug products from prescription to non-prescription status to identify relevant pharmacist and pharmacy characteristics on which to base segmentation strategies. Using a cluster analysis, members who were negative towards the shift but acknowledged some benefit, had lower prescription volume and sales, but had greater sales from non-prescription drugs.
<i>Smith, H. A., et al. (1991)</i> ³⁸	National Association of Retail Druggists	United States	Segmentation Marketing Mix	A cross-sectional study which mailed-out a self-administered survey to pharmacy patients, in order to identify the patronage factors relevant for consumers to allow for marketing focus. Four areas of focus (service, convenience, price, and retail) are important for marketing strategies relevant to patronage.
<i>Franzak, F. J. (1992)</i> ³⁹	Health Marketing Quarterly	United States	Targeting Marketing Mix	A cross-sectional study of community pharmacists provided with a self-administered survey to examine the use of marketing strategies and whether different type of retailers differs. Among the different pharmacy types (neighbourhood prescription focused, and department) significant differences in strategy usage existed.

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
<i>Abratt, R. and J. M. Anley (1994)⁴⁰</i>	International Journal of Advertising	South Africa	Marketing Mix Promotion	Using informal interviews and a pre-developed a questionnaire asked to pharmacists, this cross-sectional study attempted to develop a promotions mix appropriation model. They identified that personal selling expenditure was the highest contributor of total promotional spend. Followed by advertising, sales promotion, and publicity.
<i>Pioch, E. A. and R. A. Schmidt (2001)⁴¹</i>	Marketing Intelligence and Panning	Germany	Differentiation Positioning	Using in-depth interviews with retail pharmacists, the authors discuss the legal restrictions of the conventional marketing mix. As such, a tentative typology of pharmacies is developed, highlighting the importance of collaborative links and a strategic business perspective.
<i>Schmidt, R. A. and E. A. Pioch (2001)⁴²</i>	International Journal of Retail and Distribution Management	Germany	Marketing Mix	This is similar to the study by Pioch and Schmidt (2001) ⁴¹ , where they perform in-depth interviews with retail pharmacists. The differences between the status quo of pharmacy before and after German unification are discussed, and the typology is re-mentioned.
<i>Gurau, C. (2005)⁴³</i>	Journal of Consumer Marketing	United Kingdom	Targeting Differentiation	A cross-sectional analysis study of marketing procedures by pharmaceutical sites in order to investigate the advantages and risks with online transactions. Four consumer categories are identified and the model of online pharmacy adopted depended on the market segment that was targeted.
<i>Schmidt, R. Ä. and E. A.</i>	International Journal of Retail	United Kingdom	Differentiation Positioning	A cross-sectional study utilising qualitative interviews with independent pharmacists, to explore the potential of retail branding as a tool for pharmacies to complement their role as therapeutic experts

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
<i>Pioch (2005)</i> ⁴⁴	and Distribution Management			and enhance their competitive position. The article identifies that the independent sector fails to make use of the opportunity for retail branding and marketing support.
<i>Schommer, J. C., et al. (2006)</i> ⁴⁵	Research in Social and Administrative Pharmacy	United States	Targeting Positioning	Using data licensure records for the years of 1992 and 2002, this study describes the changes in market dynamics of the pharmacy mix (independents versus chains). Population density was found to have caused the ratio of independent to chain pharmacies to significantly change from 2:1 in 1992 to 1:1 in 2002.
<i>Franic, D. M., et al. (2008)</i> ⁴⁶	Journal of the American Pharmacists Association	United States	Targeting Marketing Mix	A cross-sectional study providing community pharmacy consumers with a self-administered questionnaire to evaluate choice behaviour when having a prescription filled in different pharmacy settings. From the 4 pharmacy settings (independent, grocery store, community chain, or discount store), staff quality (both pharmacists and general staff) were shown to affect pharmacy patronage motives. Those consumers that frequented non-independent pharmacies were also motivated by secondary convenience factors (such as hours of operation and prescription coverage)
<i>Bush, J., et al. (2009)</i> ⁴⁷	Research in Social and Administrative Pharmacy	United Kingdom	Differentiation	A cross-sectional study that provided community pharmacists with a self-administered questionnaire to examine their public health activities, attitudes to policy, and the association of attitudes and activities with the type of pharmacy. Respondents believed that despite the premise of chain and supermarket pharmacies may not be optimal for the provision of services, they had an advantageous position in attracting financing for the development of services.

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
<i>Hamilton, J. (2009)</i> ⁴⁸	International Journal of Pharmaceutical and Healthcare Marketing	Australia	Positioning	This retrospective study used previous literature data for structural equation modelling to explain the pathways that can enhance pharmacy-to-customer engagement and provide capacity to build closely aligned customer interface systems. Six variables for engagement have significant direct and/or indirect impact on customer perspectives of their pharmacy.
<i>Levaggi, R., et al. (2009)</i> ⁴⁹	Health Policy	Online Pharmacies	Targeting Differentiation Promotion Price	This cross-sectional study used content analysis to analyse the marketing and pricing strategies of online pharmacies. Marketing Strategies differentiated in the forms of location, seeling arguments, legal considerations, quality of service. Pricing strategies differentiated in 2 forms: type of drug sold and if prescriptions are required.
<i>Feletto, E., et al. (2010)</i> ⁵⁰	Pharmacy World & Science	Australia	Differentiation	Using semi-structured interviews with community pharmacy owners, managers, and support staff, this cross-sectional study aim to identify organisational flexibility to integrate products and services as well as viewing the perceptions of the viability of these models. They found that 4 types of flexibility to build capacity (steady-state, operational flexibility, structural flexibility, strategic flexibility) which manifested itself in 4 types of business models (classic community pharmacy, retail destination pharmacy, health care solution pharmacy and networked pharmacy). The viability perception of these models was focused on the differentiation through either a retail or services focus.
<i>Kamal, S.</i>	Journal of	Egypt	Differentiation	This study examined quality as a marketing tool in marketing healthcare facilities, to which they

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
(2010) ⁵¹	Oncology Pharmacy Practice			concluded that consumer perceptions of service quality affect the choice of the healthcare facility.
Athavale, A. S., et al. (2011) ⁵²	Journal of the American Pharmacists Association	United States	Segmentation	A cross-sectional study attempting to identify useful patient loyalty segments (PLSs) in retail pharmacy patrons, to aid in the development of effective marketing strategies. He identified PLSs were labelled as externally influenced, trust driven, textbook loyalists
Engle, J., et al. (2011) ⁵³	Journal of the American Pharmacists Association	United States	Promotion	The authors mention the use of social media incorporated into their marketing campaign. Pharmacy volume was reported to increase by 3% since last year, but no timeline of the study was provided.
Perepelkin, J. and D. D. Zhang (2011) ⁵⁴	International Journal of Pharmaceutical and Healthcare Marketing	Canada	Targeting Differentiation Positioning	A cross-sectional study surveying community pharmacy patients who had filled a prescription at the last pharmacy they had visited, in order to understand differentiation to earn customer trust, via the unique corporate brand personality. The authors' findings suggest that even though significant differences may exist between brand personalities, customers rated independent pharmacies slightly more trustworthy than multinational mass merchandisers and chain pharmacies.
White, L. and C. Klinner	Research in Social and	Australia	Differentiation Positioning	A cross-sectional study conducting structured interviews with pharmacy assistants and pharmacists, to explore the perceptions of the community pharmacy staff regarding factors that constitute a high

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
(2012) ⁵⁵	Administrative Pharmacy			level of service quality. The authors suggest that service quality is limited due to low internal communication and control process that impede clarity amongst roles and expectations.
Daly, C., et al. (2013) ⁵⁶	Journal of the American Pharmacists Association	United States	Marketing Strategy	A prospective cross-sectional study to identify the marketing strategies used by pharmacists. Results not reported in the abstract.
Su, L., et al. (2013) ⁵⁷	Journal of Medical Marketing	China	Marketing Mix	This cross-sectional study used self-administered questionnaires to analyse the consumer's perception and acceptance of the marketing mix of online pharmacies. Seven factors (non-prescription drugs and health foods, non-drugs, payment methods, price, personal selling and service, sales promotion and advertising), were the most important influence factors of marketing mix for online pharmacies.
Gavilan, D., et al. (2014) ⁵⁸	Research in Social and Administrative Pharmacy	Spain	Promotion	A cross-sectional study providing community pharmacy consumers with a self-administered questionnaire to analyse how shopping experiences can affect behaviour based on new marketing practices, as well as to study the customer satisfaction as a mediator between shopping experiences and behaviour. The authors found that hedonic experiences as well as functional experiences of customers were important for their satisfaction and indirectly significant for their shopping behaviour. Pharmacies are recommended to market a better shopping experience through a range of

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
				options such as ambience and promotions
<i>Kosloski, K., et al. (2014)⁵⁹</i>	Journal of the American Pharmacists Association	United States	Marketing Strategy Marketing Objectives	A quasi-experimental, randomized controlled study that analysed the implementation of a marketing strategy that focused on increasing patient awareness and participation. Using information packets and primary care provider endorsed letters as an intervention. They showed that there was a statistically significant increase in patient participation, but no difference in the type of intervention.
<i>Schommer, J. C., et al. (2014)⁶⁰</i>	Research in Social and Administrative Pharmacy	United States	Targeting Positioning	Following a previous study ⁴⁵ and using data licensure records for the years of 1992, 2002, and 2012, this study describes the changes in market dynamics of the pharmacy mix (independents versus chains). Metropolitan design and population density changes have caused the ratio of independent to chain pharmacies to change from 2:1 in 1992 to 1:2 in 2012.
<i>Athavale, A. S., et al. (2015)⁶¹</i>	International Journal of Pharmaceutical and Healthcare Marketing	United States	Marketing Strategy Promotion	A cross-sectional study that provided pharmacy patrons with a self-administered questionnaire, to identify the antecedents and consequences of pharmacy loyalty behaviour. They suggest that general satisfaction and trust had a statistically significant relationship with loyalty behaviour and word-of-mouth promotions.
<i>Huet, A. L., et al. (2015)⁶²</i>	Journal of the American Pharmacists	United States	Promotion	A cross-sectional study, where the authors compared acceptance rates of 2 passive (letters and bag stuffing) and 2 active (face-to-face offers and telephone calls) promotional approaches for medication therapy management (MTM) services. Amongst the 4 promotional methods, no significant difference

<i>Author</i>	<i>Publication</i>	<i>Country</i>	<i>Framework</i>	<i>Brief Description</i>
	Association			was amongst patients acceptance of MTM services.
<i>Martins, L. and S. Queirós (2015)⁶³</i>	Health Policy	Portugal	Segmentation	A cross-sectional study of market characteristics (competition level) and individual pharmacy characteristics and their impact the types of services provided. The authors suggest that areas of high competition are more likely to offer services such vaccine and medicines administration services, medication management programmes and pharmaceutical care programmes. Although it was also suggested that there is no significant difference amongst some pharmacies in different competition groups.

Country of Focus

As seen in Table 3, research has been conducted in a wide variety of contexts and countries. Despite this, over half of the 35 studies focused on community pharmacies in the United States. Researchers from Australia and the United Kingdom published 3 studies each; and China, Egypt, Portugal and Spain each published 1-2 studies.

Publication Type

It is noticeable notable that the majority of the publications with evidence for marketing activities are written within what can be described as 'health literature'. Health literature published 28 of the 35 articles,^{11, 30, 31, 33-39, 45-61, 63} with the Journal of the American Pharmacists Association^{31, 46, 52, 53, 56, 59, 62} publishing 7 articles and Research in Social and Administrative Pharmacy^{45, 47, 55, 58, 60} 5 articles. Only 6 of the articles included were from business journals.^{32, 40-44}

Level of Evidence

Based on NHMRC guidelines,²⁷ most of the articles would be considered of Evidence Level 4, as they were mostly cross-sectional studies with a post-test outcome; however, some exceptions do exist. Kosloski et al. performed a quasi-experimental randomized control study using a marketing strategy focused on using information packets and primary care provider endorsed letters to increase patient participation.⁵⁹ A literature review by Gagnon would be another study at high-level evidence, as it is a synthesis of other articles.³⁰ A longitudinal study by Schommer et al. did show that metropolitan design and population density was related to the market dynamics of community pharmacies.^{45, 60} Yet, this relationship was described through association rather than by causation.

Marketing

This study's framework allowed for the mapping of all included articles. Using the marketing framework from Figure 1, the included articles discuss a range of marketing activities, with some overlapping into more than one area of discussion. Only 2 articles provided research regarding "marketing objectives." One related to developing a marketing plan,³⁶ whereas the other examined marketing objectives for an economic objective.⁵⁹ Yet, both articles were only available as an article abstract. Five articles discussed marketing strategies as a holistic topic, as opposed to their 4 individual elements. Four articles evaluated marketing strategies outcomes to an objective.^{36, 56, 59, 61} Gagnon, on the other hand, performed a literature review to identify pharmacy

patron motives and the factors involved.³⁰ His article was considered to relate to marketing strategies as a whole, as he extracts factors that may be important in trying to create value for a customer.

Segmentation

Within the elements of marketing strategy, there are some overlapping sub-elements. Beginning with segmentation, 7 articles focused on “segmentation” activities of a market.^{11, 31, 32, 34, 38, 52, 63} Segmentation is “dividing the market” and was considered specific to consumers.¹ Athavale et al. explored segmenting loyalty groups;⁵² Carroll and Gagon[sic] explored differences in consumer segments based on sales potential and demographics;³⁴ Carroll and Jowdy segmented 3 types of pharmacy patrons (independent, chain and no pharmacy) and described the characteristics of each type of pharmacy patron and motive factors of each these segments;¹¹ Nickel and Wertheimer describe segmenting the market based on their demographics and preference for a type of pharmacy;³² Stewart et al. analysed consumer choice of a pharmacy and the factors important for choosing a pharmacy;³¹ Smith et al. identify 4 focus points (service, convenience, price and retail) for segmenting a market;³⁸ Martins and Queiros grouped pharmacies into competition groups and explored the typology of the services they would offer.⁶³

Targeting

Market “targeting” has some similarity to market segmentation but is the “process of evaluating a market segments’ attractiveness”.¹ Eight articles focused on “targeting” markets.^{37, 39, 43, 45, 46, 49, 54, 60} Franic et al. focused on the wants of consumer groups based on different pharmacy settings, showing how the type of pharmacy (independent, chain, grocery store, discount store) could target a consumer market;⁴⁶ Franzak explored the different strategies used based on different types of pharmacies (neighbourhood, prescription focused, and department);³⁹ Gurau analysed the marketing procedures by pharmaceutical websites to identify the consumer segments that are attracted to which marketing procedure;⁴³ Levaggi et al. examined the marketing strategies of online pharmacies and how they may differentiate themselves based on a target market;⁴⁹ Nagasawa et al. describe a segmentation strategy of receptivity of pharmacists towards switching from prescription to non-prescription drugs and its influence on sales outcomes;³⁷ Perepelkin and Zhang examine branding and trust and the differences between pharmacies based on consumer perceptions;⁵⁴ Schommer et al. first observe the market changes of pharmacies up to 2002⁴⁵ and 2012,⁶⁰ and explain the changes in the metropolitan design and population density caused different types of pharmacy to thrive.

Franic et al. and Perepelkin and Zhang sampled consumers; Schommer et al. examined pharmacies; and Gurau examined online pharmacies.

Differentiation

Market differentiation is the initial step taken before developing a positioning strategy.¹ Eleven of the articles discuss the effects of “differentiation”.^{33, 35, 41, 43, 44, 47, 49-51, 54, 55} Kamal describes quality as a tool for differentiation;⁵¹ White and Klinner on the other hand delve deeper into service quality determinants;⁵⁵ Bush et al observed the corporatization of pharmacies and how pharmacists attitudes towards the differentiated types of pharmacies (supermarket, chain, or independent) was affected by corporatization;⁴⁷ Feletto et al. explored flexibility of business models and adopting differentiation using services;⁵⁰ Pioch and Schmidt examined both regulation and its effect with commercial differentiation⁴¹ as well as if branding can help;⁴⁴ Perepelkin and Zhang similarly discussed the advantage of branding as a differentiation tool;⁵⁴ Gurau describes the differentiation methods of online pharmacies and their market targeting;⁴³ Lipowski and Wiederholt develop a measure for retail image and how this can be used for a market;³⁵ Levaggi et al. examined the content of online pharmacies to explore how differentiation (based on variety, quality and target market) between them;⁴⁹ and finally, Zelnio and Gagnon explore the use of store image as a positioning strategy, as well as using image to differentiate a pharmacy.³³

Positioning

Positioning an offering is done so as to “occupy a clear, distinct, and desirable place relative to competing products in the minds of target consumers”.¹ It is more of an intangible thought than market differentiation. Nine articles discuss “positioning” within the market.^{33, 35, 41, 44, 45, 48, 54, 55, 60} Zelnio and Gagnon explore the use of store image as a positioning strategy;³³ Hamilton examined which consumer perceptions of the pharmacy image can increase customer engagement with the pharmacy;⁴⁸ pharmacy image was also discussed by Lipowski and Wiederholt, who mention positioning the image for target market.³² There are articles that are already mentioned above and discuss positioning in regards to branding,^{44, 54} changes to market dynamics,^{45, 60} changes to regulation,⁴¹ and positioning using service quality.⁵⁵

Marketing Mix

The studies also describe different areas of the “marketing mix” in community pharmacy. This may be described in the complete sense, where an article relates to all elements of the “marketing mix,” or partially,

where they may focus on specific attributes of the mix. Four articles describe the marketing mix efforts.^{39, 42, 46, 57} Su et al. analyse the marketing mix of online pharmacies;⁵⁷ Franic et al identify what factors are important to consumers choice of a pharmacy;⁴⁶ Franzak explored the different strategies used based on different types of pharmacies;³⁹ and Schimdt and Pioch examine the marketing mix of German pharmacies and suggest a typology for pharmacy type.⁴²

From the marketing mix, promotional activities was the topic mentioned most prominently from the marketing mix with 7 articles,^{40, 49, 53, 56, 58, 61, 62} followed by the one article mentioning price.⁴⁹ From the 4P model, no mention was made about “place” or “product” as an individual focus of an article. As part of the 7P model, only “people” was focused specifically by one article⁴⁶ and its relation to the “marketing mix” as a whole.

Outcomes

Articles identifying outcomes of marketing were limited. The outcome measure most commonly discussed was participant perceptions. Consumers’ perceptions and behaviour was examined in 17 articles. Six articles examined the attitudes of consumers in regards to branding,⁵⁴ store image,^{32, 33, 57} and improving consumer engagement.^{31, 48} Intentions of consumers was explored by 14 articles in regards to loyalty behaviour,^{34, 52, 61} patient participation,^{53, 58, 59, 62} patronage motivations to choose a pharmacy,^{11, 30-32, 38, 46} and engagement.⁴⁸ Nine articles explored the perceptions of pharmacists. Five of those articles explored the attitudes of the pharmacists. Abratt and Anley explored the attitudes of pharmacists’ promotional activities;⁴⁰ Bush et al. compared the attitudes of pharmacists between different types of pharmacies (chain, supermarket, and independent);⁴⁷ Feletto et al. compared pharmacy attitudes with business change flexibility;⁵⁰ Nagasawa segmented the attitudes of pharmacist towards prescription to non-prescription conversion;³⁷ and Stewart and colleagues compared attitudes of pharmacists with that of consumers on the topic of consumer needs and wants.³¹ Five articles also explored pharmacists knowledge and understanding to prompt differentiation benefits,^{41, 42, 44} identify service quality determinants,⁵⁵ and analysis pharmacists’ promotional activities.⁴⁰

Discussion

A systematic approach according to the PRISMA guidelines was used in order to identify the literature for this scoping study. The PRISMA framework for categorising the included studies allowed for discernment of the scope of evidence/literature from which one can appraise the quality of the studies.

Literature:

Publication year

The discussion of marketing that occurs within the community pharmacy sector is seen as a reactive effort rather than a proactive effort. Market dynamics of community pharmacies in the United States began changing with the entry of new players such as supermarkets and mass merchandisers in the early 1980's.^{11, 12} The rise of competitors caused traditional pharmacies to reflect on their current status and consider how they wish to thrive in the market. It is noticeable, as the rise of publications that occurred during the end of the 1980's highlights efforts to combat the growing pressures of competition. This notion of rising competition is seen with articles written about the Australian market. The number of articles written since 2009 can be due to changes in the market dynamics with increasing competition seen from community pharmacies.²⁰ As Singleton and Nissen suggest, to advance and survive in a hypercompetitive market, pharmacies can adopt a differentiation strategy.²⁰ The 3 Australian articles written all describe the use service or service quality as an approach to differentiation and engaging customers.^{48, 50, 55}

Country of focus

With over half the studies coming from the U.S. States, we see the strongest evidence for marketing activities coming from a single country. The ability for this evidence to be generalised to other countries is difficult for several factors, the first being the different regulatory environments as mention in the introduction. For instance, community pharmacy is restricted by its code of ethics in its' marketing. For example, in the Australian context, the guidelines provided by Australia Health Practitioner Regulation Agency (AHPRA) suggest that advertising cannot create the idea that the "provider of a regulated health service is more qualified or more competent than a holder of the same registration category."⁶⁴ The professional ethics of pharmacy constrains the message that can be promoted to achieve the desired objectives. In the U.S., the American Pharmacists Association (APhA) describes a broader set which states that "A pharmacist respects the

values and abilities of colleagues and other health professionals.”⁶⁵ The professional ethics of a pharmacist will take a precedence and thus limit their marketing creativity. As such, no articles were identified that describe marketing within professional ethics, but rather assumed to be inherent. Similarly, no articles were identified that suggest breaking professional ethics, whether explicitly or implicitly.

A second consideration is consumer expectations differing in each country. Service quality was identified as influenced by cultural orientation.^{66, 67} Different countries will have different perceptions of service quality. Therefore, it would be important for businesses to consider the influence of culture on consumer behaviour, to make it applicable to a worldwide context.

Level of Evidence

The nature of a scoping review results in articles from lower levels of evidence and trade journals as compared to the work of systematic literature reviews.^{21-23, 25, 26} The majority of the articles were qualitative discussions from “expert opinions”, which were excluded from synthesis. The remaining articles might be considered a higher level evidence of articles of level 4 or greater, which are mostly cross-sectional or cohort studies. Longitudinal studies are lacking in the literature besides the 2 related studies by Schommer and colleagues.^{45,}

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Conceptualisation:

As part of a business’s market planning there is the development of objectives to the business wishes to achieve.^{68, 69} As such in order to achieve these objectives, coordination of marketing activities is undertaken.¹ A marketing strategy will be developed in order to meet the objectives, which are then known as the marketing objectives.^{68, 69} According to Figure 2.1, the marketing strategy will identify the customer base it wishes to serve by segmenting the total market and targeting the favourable sections. After targeting, how this target customer base is serviced by the pharmacy’s differentiation and positioning is analysed.¹ From Figure 2, the marketing mix are the variables that are altered in order to implement the marketing strategy.² To effectively allocate resources to meet objectives,⁷⁰ the pharmacy involves itself with a continuous cycle of activities of market analysis, planning, implementation and control.¹

Marketing Strategy

The 4 articles that discuss marketing strategy features it as the central topic of the article. These articles discuss either marketing strategies to the marketing objectives,^{36, 59} or evaluations of marketing strategies as a whole concept.^{56, 61}

Market Segmentation

Market segmentation needs to consider the dynamic nature of a market base. Nagasawa et al. discuss segmentation based on the attitudes towards retail sales, and suggested that pharmacists that were more open to product recommendations than prescriptions had a higher economic return.³⁷ Similarly, Kelly suggests the importance of considering the location when asking the questions of how to breakdown the population.⁷¹ Yet, neither article considers the dynamic nature of the market base. They considered a static approach to segmentation, whereas Gehrt and Pinto suggest that a market can be segmented based on situation.⁷² Patients who are seeking a minor ailment help may see the pharmacist, or depending on if it was for themselves or for another, such as a child, may see another healthcare profession. Though a majority of the articles discuss how to segment the market,^{11, 32, 34, 37, 43, 51, 52} the dynamic nature of the market has not been taken into consideration.

Branding

Part of market strategy involves differentiation by taking a market position. Banner groups and chain pharmacies will market themselves on a position they have in the market. It will be clear through their marketing and branding if they have a price or service focused approach. Only 2 articles explored branding: Schmidt and Pioch described the potential of branding as a tool,⁴⁴ and Perepelkin and Zhang quantify how branding or the position of brand can have an influence on consumer perceptions. The study by Schmidt and Pioch was reliant on qualitative interviews with independent pharmacists. Though, as Schmidt and Pioch describe, the independent pharmacies make poor use of branding opportunities.⁴⁴ Perepelkin and Zhang also suggest that differentiation via branding as 'competent and sincere' is a positioning strategy that independent pharmacies can use in order to earn customer trust.⁵⁴ In the Australian market, pharmacists are exclusively entitled to a pecuniary interest in a pharmacy, and thus, the use of franchises is more common. This is in contrast to the U.S. and United Kingdom where chains are predominantly owned by corporations. The Australian market has also become increasingly competitive,^{20, 73} and recent years have seen a rapid rise in

branded pharmacies with a clear price focused marketing strategy.^{73, 74} Market segments have gravitated towards the market differentiation and positioning of these pharmacies, yet no studies have been identified that view the effect of a price-focused marketing strategy has had on consumer perceptions or behaviour.

Marketing Mix

“Marketing mix” provides pharmacist with the elements they can alter to achieve the desired marketing objectives. As such, the 4P’s of marketing (product, price, place, promotion) are the elements most commonly discussed topics. Considering that pharmacy is regarded to be a service industry, it would be assumed that more discussion would be around the 7P’s of pharmacy (people, physical evidence, process), that was developed in the 1980’s.²⁹

Promotion

As part of the marketing mix, most articles discuss the promotion aspect of the marketing mix. These were either discussions focused exclusively on the marketing mix^{40, 49, 53, 58} or a part of discussions where marketing strategy was the focus.^{56, 61} The predominance of discussions around promotions is probably because modifications to promotional activities are easy to do to measure influences on behaviour. Engle and colleagues discuss social media promotions and identifying increases in foot traffic,⁵³ whereas Athavale and colleagues focus on promotion as part of loyalty behaviour,⁶¹ and Gavilan and colleagues measure promotion and discuss how it can influence both patient satisfaction and shopping behaviour.⁵⁸ Here we have the strongest evidence of the impact of a type of marketing activity, being promotion, on consumer behaviour. Expert opinions from trade journals discuss promotional activities to a far greater extent.^{16-19, 39, 42, 57, 59, 75-86}

Promotion is possibly the most discussed element from the marketing mix because most pharmacists will mix the term marketing as being synonymous with promotion or promotional activities. Promotions are typically dynamic, and therefore evidence of its influence on behaviour may be easier to obtain than other marketing activities.

Price

An analysis of online pharmacies and their pricing strategies were the only 2 articles^{49, 57} that explicitly described pricing. Pricing strategies were well discussed by Tootelian^{18, 19, 84-86} in a series of articles in the late 1980’s, but these articles were qualitative expert opinions, and thus were not included in this scoping review

for synthesis. It was expected that price, being such an easily modified marketing element to create a differentiated and competitive position,¹ would be discussed in greater detail.

Internal Marketing

Another facet of marketing that did not emerge from the literature search was the concept of internal marketing. Internal marketing has a variety of definitions from focusing on either the customer or the employees of a business, but essentially it is defined as aiming to deliver a consistently high service quality.⁸⁷ Considering that the pharmacy industry is also considered a service industry, it is also expected that emphasis would be placed on internal marketing to achieve and maintain a level of high service quality. Only one article was identified that discussed internal marketing and this was culled from inclusion as it was discussing internal marketing for a specific service.⁸⁷

Evidence for the Effect of Marketing

This review highlighted the limited evidence for the effect of marketing on consumer behaviour and/or consumer measures, including knowledge, attitude, engagement and intention. The majority of articles that investigate marketing and consumer behaviour were cross-sectional and thereby can identify association, not causation. Experimental designs that investigate causality are warranted.

Economics of Marketing

Managing profitable customer relationships is a simple definition of the scope of marketing.¹ As such, ensuring the "profitability" of marketing activities is part of allocating and measuring marketing resources.² Profitability can go beyond excess revenue and considers sustainability and/or organisational growth. Thus, it was expected that greater economic reporting would be identified, yet, with the few studies that analysed marketing in economic outcomes, there is a lack of robust studies. The 2 articles that do mention some economic outcome from marketing, are limited in their rigor. Both articles are abstracts,^{53,56} and from which, Engle et al. suggested the use of social media for a marketing campaign as the campaign reported organisational growth,⁵³ yet Daly et al. had not reported the outcomes in their abstract but planned to have it ready by the conference date.⁵⁶

Return on Marketing Investment

Pharmacy business owners have a concern and consideration for the financial interests of their business. Therefore, marketing efforts need to be valued and justified. Returns on marketing investment (ROMI) need to be considered for the impact of the marketing activities.² Even though discussing ROMI may be important, it is equally important to link it with clear objectives. Tootelian¹⁸ opined that there is a need to link marketing activities with financial goals, which highlights the importance of this linkage. Therefore, measurable objectives compared to investment input need be researched. If marketing activities are of no value to meeting objectives, reassessment and redesign of new marketing strategies can be developed.

Innovation

Diffusion of Innovations

There is a lag in the use of marketing theory between general marketing literature and pharmacy-specific marketing literature. The 7P's of marketing were discussed in the 1980's by Bitner and Booms,²⁹ yet the majority of the articles identified only discuss the 4P's of marketing. The first identified publication that discusses the 7P model was Schmidt in 2004,⁸⁸ with mention of the model in the discussion. Throughout the 1980's and 1990's, incremental progress was made with the realisation of the extension of the 4P's of marketing by development of 5P's (as either 'people'⁴² or 'place'⁸⁰) and 6P's (the addition of 'people' and 'pride')⁸⁹. The outcome of the 7P's is only discussed by Franic and colleagues as they identify people having an impact on the decision making process of pharmacy choice.⁴⁶ A more contemporary model of marketing mix, the 4C's (customer solution, customer cost, convenience, communication)^{90,91} of marketing, as introduced by Lauterborn, and later Kotler, has yet to be discussed in the pharmacy literature. A possible reason for the lag in uptake of contemporary marketing theory may be that only a minority of article authors have formal qualifications in marketing or business with the majority of authors coming from a background in pharmacy. A solution would be increased collaboration of pharmacy academics and departments with marketing academics and/or university business faculties.

Innovators Are Not Writing About It

The literature focuses on what to do and how to do it but there is scant literature on the effect of conducting marketing activities. Marketing activities may be conducted through the initiation of corporates, franchises, and banner groups, but individual pharmacies may have their marketing campaigns organised through the

proprietor or managing pharmacist. These people are generally not professional marketers. Some expert opinions^{76,78} contain discussion pieces where there are recommendations to hire marketing firms to provide these marketing services. Furthermore, marketing requires a constant innovation⁹² as it is required for corporate growth and survival.⁹³ Yet, as the limited number of articles highlight, those individuals or organisations that are actively involved in marketing campaigns are not writing about it in an academic sense. As such, the innovative marketing activities are not being published. Examples of activities may be noticeable through day to day functions, or written about in trade journals from hindsight, but this creates a gap where what is being performed and what is being measured. Marketing strategies of companies may be identified as well executed, but little is discussed about its science. Only one article described the use of social media as part of the marketing plan in order to drive greater traffic.⁵³ Recent innovations may be the use of mobile applications as marketing tool⁹⁴ and it may be known that the innovative marketers may use these apps to achieve objectives. Yet, no article was identified that discuss the use of mobile applications for marketing in pharmacy. This may be because the focus of mobile applications is for their health benefit outcomes rather than the valuable marketing opportunity it provides.

Strengths and Limitations of this Review

To the best knowledge of the authors, this is the first paper to synthesise the evidence for marketing activities in the community pharmacy sector. A strength of the study was the use of a framework, as it provided consistency in the approach and a conceptual map of the literature. Mapping to a framework gave a grounded approach and allowed for an easier identification of the gaps in knowledge.

Apart from the strengths, there were several limitations. One was that the language was limited to English. This may have resulted in the low number of non-English speaking countries being included in the search. Another limitation is that one researcher performed the retrieval and synthesis of articles. In the case of a third category of uncertainty, discussions were undertaken with a second author, but there were not 2 independent raters throughout the entire search process. By excluding literature focusing on a specific disease state this may limit the inclusion of literature that have already applied a marketing strategy.

Conclusion

Despite the accepted influence of marketing, there was only limited evidence in the literature for the effect of marketing on consumer and economic outcomes. By using use of a developed framework this scope review mapped and categorised the literature. It also highlighted that the literature is reactive to market change. Studies that allow causality to be determined for the effect of marketing activities on consumer behaviour and economic outcomes are required.

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