



Study Examines Shopping Experience of Pharmacy Customers

The German original of this article was first published in Research & Results, issue no. 4/2014.

In order to be successful one needs to know one's customers, reckons Claudia Greischel. She presents a study that revealed deep insights into the shopping behaviour

at pharmacies as well as into the shoppers' attitude towards pharmacies and pharmacy visits.

Pharmacies have a special place in a comprehensive health care system. The pharmacy is considered a mecca of expertise for all questions related to health and well-being. Today they are by no means limited to filling prescriptions or selling over-the-counter medication. The shopping bags often fill up with other items as well; particularly attractive special offers allure to stocking up, or a new product becomes the center of attention thanks to smart marketing campaigns. For more than one in five respondents, the ambience and product range occasionally even leads them to impulse buying. Therefore the shopping experience in itself comes more and more into focus.

A detailed description of the current pharmacy landscape is offered by the apoSCAN study (Shopper Marketing Channel Analysis) conducted by Produkt + Markt in collaboration with UWG Communications and assisted by Pharma Relations. The study examines the behaviour of pharmacy customers – supplemented by the portrayal of different types of customers and their distribution across the different kinds of pharmacies as well as detailed analyses on the promotional tools used at the pharmacies.

More than 2,000 interviews

After a qualitative preliminary study had identified relevant topics, Produkt + Markt conducted about 2,000 online interviews. The subjects were individuals who are (also) responsible for their pharmacy shopping, and who buy non-prescription medication or other products from the pharmacy product range at least four times a year. The total sample naturally accumulated a sufficient share of regular patrons of each of three previously determined pharmacy types (traditional, modernly open, discount). Hence the detailed analyses per pharmacy type are strong and meaningful.

In addition to the most commonly visited traditional pharmacy, the modernly open pharmacy as well as the discount pharmacy (at a lower share) are also relevant to the target group. The traditional pharmacy is mainly considered their regular pharmacy because of the good quality of advice and generally being close to home. Characterised by significantly larger self-service areas and a brighter, more welcoming ambience, one in four respondents choose the modernly open pharmacy as their regular pharmacy. The younger the respondents the higher the number of regular customers: From the group of 18 to 25-year-olds, one in two is already a regular patron there. In order to retain this demographic as customers, focusing on a modernly open ambience will become more important in the long run.

Additional instrument incorporated

But what exactly distinguishes the modernly open pharmacy from the other pharmacy types? In order to answer this question, VA|LERY – an instrument developed by Produkt + Markt – was incorporated into the survey. Implicit associations, emotions, and motives can be measured and illustrated by means of a validated picture gallery, and hence the perception of the different pharmacy types as well. The result: the ascertained image and word associations concerning pharmacies in general mainly contained aspects like “trust”, “competence”, and “care”. Depending on the respective pharmacy type, other aspects come into focus. For the modernly open pharmacies “sociability” and “enjoyment” were mentioned, which are factors that turn the shopping trip into a special experience.

As part of this shopping experience, regular customers of modernly open pharmacies exhibit a stronger preference for trends and promotions involving the topic health and beauty. This also explains why there prescriptions are filled not quite as frequently as at traditional pharmacies. Hence the “core business” of modernly open pharmacies is supplemented and partially replaced by a general focus on universal health and wellness issues. However, big differences in respect to the regular customers’ monthly spendings could not be detected. This might come as a surprise at first, especially since the reasons for choosing a modernly open pharmacy as regular pharmacy are lower prices and special offers, among other things. However, a stronger price orientation might actually encourage more purchases, above all. After all, by amounting to 27 euros, the monthly average receipt of regular customers at the discount pharmacy is actually the highest.

Different types identified

By means of cluster analysis, another step identified seven additional types of pharmacy shoppers (fig. 1). Each type is as homogenous as possible in itself, while the types as a whole are as heterogenous as possible. Who exactly are the people who shop at modernly open pharmacies? Of course, all seven types of shoppers can be seen there; but in comparison to the traditional pharmacy, the “open-minded aficionado” and the “convenience-oriented bargain hunter” can be found there significantly more frequently. Hence, types who also attribute great importance to the ambience in their shopping experience. Compared to the other types, they visit pharmacies more frequently in order to pick up OTC medication, or to buy products from the self-service area.

Choosing Promotional Tools Purposefully

In this context, the following question arise: What kind of promotional tools are actually attractive for this target group? What leads to a higher purchase frequency and better customer loyalty? On the one hand, apoSCAN identifies promotional tools that are

suited for all types of shoppers, and on the other hand uncovers possible individual approaches per type of shopper. For example, for the “convenience-oriented bargain hunter” free giveaways and product samples are particularly relevant, even though not equally known. He is one of the types who allows himself to “be allured” into purchases by the pharmacy and less frequently plans his shopping trips down to the last detail. Attractive window decorations and signs on the pavement geared to special placements contribute to the pharmacy’s profiling as the point of contact for health care with a feel-good factor.

In conclusion, the apoSCAN study helps pharmacists and decision makers in the industry alike to gain a clearer understanding of the relevant target groups and the background of the respective shopping behaviour, and to use this knowledge purposefully for modern marketing.

The Author



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