



E1 CONFERENCE PUBLICATIONS

AUTHORS(S) (IN ORDER OF APPEARANCE ON PUBLICATION)	
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TOTAL NUMBER OF AUTHORS: 1	NUMBER OF ANU AUTHORS: 1
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Please indicate the School to which this publication is to be credited (or the split credit)	MMIB
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TITLE OF PAPER The determinants of pharmacy channel selection			
TITLE OF CONFERENCE PUBLICATION ANZMAC 2007			
EDITORS:	Dr Maree Thyne Dr Kenneth R. Deans Associate Professor Juergen Gnoth		
PUBLISHER:	Department of Marketing University of Otago		
YEAR OF PUBLICATION:	2007	START PAGE 167	END PAGE 167
PLACE PUBLISHED:	Dunedin	ISBN/ISSN:	978-1-877156-28-0
LOCATION OF CONFERENCE	Dunedin	DATE OF CONFERENCE	3-5 Dec 2007
RFCD CODE 1:	350204	RFCD CODE 2 (optional):	

Eligibility

Full written version of conference paper (not abstract or extended abstract)	☒
Meets definition of research	☒
Published (volume of proceedings, book, journal, monograph, CD Rom, organisational web site)	☒
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Proof of national or international significance if not clearly shown in documents above	☒
Peer reviewed (as per section 4.3.4 of DEST Specifications)	☒
By-line or footnote or statement in publication indicating research undertaken in author's capacity as a staff member or student of the university Or Statements and evidence of affiliation	☒ ☐

CERTIFICATION & STATEMENT OF AUTHORSHIP

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 Authors Signature:

Date: 10th March 08

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CONFERENCE 2007

ABSTRACTS AND PROGRAMME

Department of Marketing
University of Otago
3-5 December 2007

3Rs – REPUTATION, RESPONSIBILITY, RELEVANCE
Conference Chair: Dr Kenneth R. Deans

Editors: Dr Maree Thyne
Dr Kenneth R. Deans
Associate Professor Juergen Groth

Supported by: School of Business, University of Otago
Published by Department of Marketing
University of Otago
PO Box 56
Dunedin, New Zealand

December 2007
ISBN 978-1-877156-28-0
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4113938

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TRACK 15 – DISTRIBUTION CHANNELS AND SUPPLY CHAIN MANAGEMENT

DO SUPPLIERS OF THIRD PARTY LOGISTICS UNDERSTAND THEIR CUSTOMERS?

Tim Coltman, Byron Keating, University of Wollongong,
Anton Kriz, University of Newcastle

Supply chain management (SCM) research has tended to focus on the planning and management of a broad range of activities involved in sourcing and procurement, conversion, and management of logistics. However, the domain is increasingly recognising the importance of coordination and collaboration between channel partners. As such, there is a need to better understand how channel partners make decisions; and in particular, whether there is an alignment in the expectations of these partners. In this study we use a form of discrete choice analysis to explore the relative importance of various supply chain components for buyers of a third party logistics services. Our research approach overcomes many of the limitations seen in previous studies that rely on simple rankings by survey respondents. The findings suggest that suppliers need to better understand the preference structures of their customers.

EMBRACING A SERVICE-DOMINANT LOGIC WITHIN THE SUPPLY CHAIN

Byron Keating, Tim Coltman, University of Wollongong
Anton Kriz, University of Newcastle

The relevance of a new service-dominant (S-D) logic for marketing has been receiving attention in the academic literature. This paper explores the applicability of S-D logic within the supply-chain. A survey of buyers and suppliers of third-party logistics services is used to assess the extent to which a philosophical shift in the orientation of the supply-chain has occurred.

PLATFORM STRATEGY OF VIDEO GAME SOFTWARE: THEORY AND EVIDENCE

Masayoshi Maruyama, Kobe University
Kenichi Ohkita, Kyoto Gakuen University

This paper analyzes a model of platform competition in markets of system goods composed of hardware and complementary software. When hardware products are strongly differentiated, and/or when consumers highly evaluate the marginal benefit of additional software variety, it is shown that hardware firms will engage in exclusive dealings of software platform. In contrast, when hardware products are weakly differentiated, and/or when the consumer's marginal benefit of additional software is relatively low, software firms will select single-homing of software platforms. These findings are strongly supported by our empirical results in the Japanese video game market structured by Nintendo.

THE DETERMINANTS OF PHARMACY CHANNEL SELECTION IN AUSTRALIA

Karl W. Noronha, Gary J. Buttriss, Australian National University

This study examines two research questions; what are the main determinants of community pharmacy selection in Australia, and how should emerging and prospective pharmacy channels position and differentiate themselves to increase their market share in the industry. Using the individual consumer decision making process as a theoretical backdrop, this paper examines how the increase in pharmacy channels has affected the pharmacy patronage decision for purchasing prescription and over-the-counter (OTC) medication in Australia. Consumers are now able to choose between community pharmacies, online pharmacies, mail order pharmacies and convenience stores. Using a determinant attribute approach, this study seeks to identify the key factors driving community pharmacy selection and indicate which attributes emerging pharmacy channels should focus on in building their market presence.

The Determinants of Pharmacy Channel Selection in Australia

Karl W. Noronha, Gary J. Buttriss, Australian National University

Abstract

This study examines two research questions; what are the main determinants of community pharmacy selection in Australia, and how should emerging and prospective pharmacy channels position and differentiate themselves to increase their market share in the industry. Using the individual consumer decision making process as a theoretical backdrop, this paper examines how the increase in pharmacy channels has affected the pharmacy patronage decision for purchasing prescription and over-the-counter (OTC) medication in Australia. Consumers are now able to choose between community pharmacies, online pharmacies, mail order pharmacies and convenience stores. Using a determinant attribute approach, this study seeks to identify the key factors driving community pharmacy selection and indicate which attributes emerging pharmacy channels should focus on in building their market presence.

Keywords: pharmacy, channel selection, decision making process, community pharmacy, online pharmacy, mail order pharmacy, convenience stores, determinant attribute

Background

Australia's retail pharmacy industry is valued at \$10 billion dollars with annual revenue growth averaging above 10% since 2000 (KordaMentha, 2006). Pharmacies sell three categories of medication; prescription, pharmacy-only over-the-counter (OTC) and general retail OTC. Exploratory primary research revealed that consumers did not distinguish between pharmacy-only OTC and general retail OTC goods in their pharmacy selection decision. Hence this study does not distinguish between the two OTC categories but rather focuses on whether the need for prescription or OTC medication influences pharmacy channel selection. Australia's retail pharmacy market can be divided into five channels: community pharmacies, mail order pharmacies, online pharmacies, hospital dispensaries and not-for-profit pharmacies. Community pharmacies are the main channel for Pharmaceutical Benefits Scheme (PBS) listed drugs and over-the-counter (OTC) medications, accounting for 90% of all retail pharmacies in Australia (Pharmacy Guild of Australia, 2005). Mail order pharmacies, online pharmacies, hospital dispensaries and not-for-profit pharmacies collectively make up the remaining 10%. While studies suggest that there is growing demand for mail-order and online pharmacy services in Australia (PC, 1999; Lane and Koronios, 2001), state and federal regulations concerning location, ownership and advertising, restrict these pharmacy channels from expanding their market share.

The past decade has witnessed rapid and substantial changes to information and distribution channels (Black *et al.*, 2002). Advancements in communication, logistics and most importantly, the Internet have created new channels from which consumers can obtain information and purchase goods and services (Black *et al.*, 2002). In purchasing prescription and OTC medication, consumers can now choose between physical outlets such as community pharmacies and convenience stores and non-physical outlets such as online and mail order pharmacies. Increased pharmacy channel choice has arisen from demand for; cheaper products, greater convenience and improved client access methods (Yang, Peterson

and Huang, 2001). Moreover, there is convergence in pharmacy channels. Many community pharmacies are developing an online and mail-order presence, abandoning the single channel business model for a multi-channel model to better meet the customers' needs (Schoenbachler and Gordon, 2002). In light of these trends, there is a growing need to understand what influences consumers to choose one pharmacy channel over another.

Consumer Decision Making Process

Engel, Blackwell and Miniard's (1990) model of individual consumer behaviour was chosen as the theoretical backdrop to the pharmacy channel selection decision. Unlike Nicosia's (1966) and Howard-Sheth's (1973) consumer decision process models which focused on brand selection, Engel *et al.* (1990) propose a more general framework for effectively organising the fast growing body of knowledge concerning consumer behaviour. The central focus of the model is the five stage problem solving process. Firstly, the consumer experiences recognition of a problem or need. Secondly, the individual undertakes an information search of the available products and services that may resolve the initial problem. This involves both an internal search (of past product and service experiences) and external search from sources such as family, friends and the Internet. Thirdly, customers evaluate between alternative options. Fourthly a selection is made, and finally, after buying a product or service, the consumer compares it to their expectations. Their level of satisfaction or dissatisfaction influences their repeat purchasing decision. Engel *et al.* (1990) also indicate that individual characteristics such as values and lifestyles and social influences such as family and culture strongly influence the individual consumer decision making process.

While the individual consumer decision making process has been dominant in studying consumer behaviour since the 1960s (Hansen, 2005), Ehrenberg (1998) criticises that the process does not adequately describe how consumers evaluate between and select service channels. Addressing this shortcoming requires a closer look at the factors consumers consider when evaluating where to purchase products and services.

Evaluation of Alternatives

The range of distribution channels available for the consumer to evaluate between has increased only in the past decade. Consequently past consumer behaviour literature addresses the issue of channel choice as a peripheral topic to retail store selection (Black *et al.*, 2002). Engel *et al.* (1990) submit that the common assumption has been that channel choice can be viewed through the same conceptual framework as retail store choice. While this is a useful starting point, store choice models do not consider how product characteristics (Morrison and Roberts, 1998) or consumer-channel interactions influence channel selection (Tauber, 1972). This study addresses these shortcomings by developing an analytical model of the determinants of pharmacy channel selection.

Two schools of thought exist regarding the conceptualisation of store choice (or in our case channel choice), the attribute-based view and the holistic view. The attribute based approach submits that store choice is influenced by both cognitive and emotional factors (Darden and Babin, 1994; Lindquist 1974). As Martineau (1958) stated, a store is defined in the shopper's mind, partly by its functional qualities and partly by an aura of psychological attributes (p.47). On the other hand, the holistic view emphasises that store choice is based on the total

impression a store makes on the minds of its customers (Baker *et al.*, 1994). Given this study will be looking at the determinants of pharmacy selection, an attribute based approach is the most appropriate for this study. The piecemeal style of information processing, in which pharmacies are evaluated on an attribute by attribute basis, will allow for comparisons to be made between existing, emerging and prospective channels. Therefore this study will adopt Lindquist's (1974) multi-attribute store image model as the basis from which to construct an analytical model of the determinants of pharmacy channel selection.

The multi-attribute attitude model was originally developed in social psychology by Rosenberg (1956) and Fishbein (1963) to evaluate the relative importance of product attributes against a consumer's attitudinal preference. The model was subsequently adapted to store choice by Lindquist (1974) who describes store choice as a combination of tangible and intangible factors that reflect consumer attitudes towards individual stores. These include merchandise, service, clientele, physical facilities, convenience, promotion, store atmosphere, institutional factors and post transaction satisfaction. However as Perry and Norton (1970) identified, while it is useful to have a general model of store choice, it is more important to identify the determinant attributes, in the evaluation process, which influence the consumer to choose one store over another.

Myers and Alpert's (1968) determinant attribute theory conceptualises the evaluation and store choice stage of the individual consumer decision making process. The determinant attribute approach clearly separates the two factors of *importance* and *difference* when evaluating a service or store. While many attributes may be considered important to the customer, there will only be one or a few important factors which are perceived to be different across pharmacy channels. These factors are called determinant attributes and are the decisive factors in a consumer selecting one channel over another. The determinant attribute approach is a research method commonly used in marketing to identify the wants of various consumer groups. Franic, Grauer and Law (2005) applied the theory to the context of pharmacy store choice and this study will take its application one step further in applying the theory to pharmacy channel choice.

Individual and Social Influences

Social cognitive theory (SCT) underlies the individual and social elements of Engel *et al.*'s (1990) consumer behaviour model. SCT emphasises that personal influences, environmental influences and behaviour itself, reciprocally interact to influence pharmacy channel selection (Wood and Bandura, 1989). Personal influences refer to behaviour at the individual level and include four sub groups; psychological, biological, lifestyle and individual factors. Environmental influences address the dynamic interactions of individuals within a larger social context. They account for the influence of both social environmental factors such as family and friends and physical environmental factors such as distribution networks and cultural norms. Behavioural influences refer to an individual's expectation of the promised outcome (Wood and Bandura, 1989). Because SCT was not originally developed for application to consumer behaviour, there are limitations to the use of SCT in this study. The use of demographic variables such as age, gender and culture in explaining consumer behaviour has been criticised for not predicting or explaining differences in consumer behaviour adequately enough (Kahle and Kennedy, 1989). Hence, while age, gender and culture have been identified as factors that influence pharmacy channel selection, this study's hypothesis will test the ability to use technology, concerns with using technology, the

influence of family and friends and the taking of regular prescription medication as determinants of pharmacy channel selection.

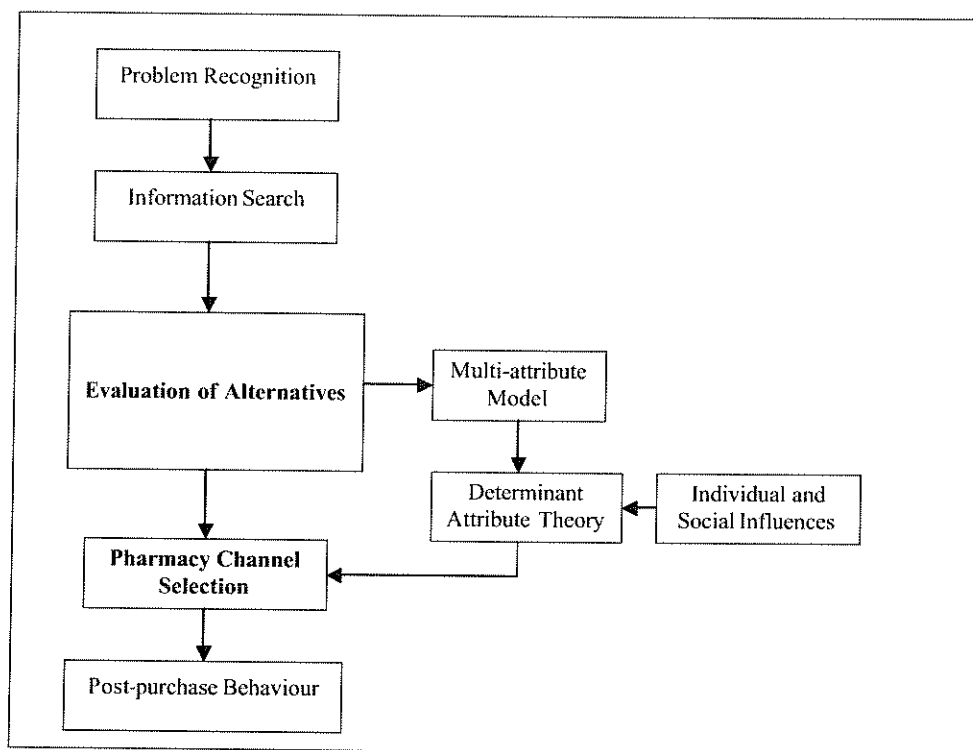


Figure 1: The Consumer Decision Making Process

Pharmacy Channel Selection

The issue of retail channel selection has received relatively little attention in academic literature with researchers concentrating on understanding and analysing channel management and channel design (Black et al, 2002). However the advancement of communication technology has increased the scope for competition and brought the channel selection decision into greater focus. During the evaluation phase of the decision making process, consumers utilise a combination of decision heuristics. Based on Gagnon's (1977) and Wiederholt's (1987) multi-attribute pharmacy store selection models, this study submits that the consumer will be faced with seven factors when choosing an appropriate pharmacy channel. The factors include; product, service, store attributes, price, convenience, relationship and safety factors. While the determinant attribute theory submits that one or a few of these cognitive factors will be critical in selecting a pharmacy channel, SCT suggests that individual influences such as ability to use technology, concerns with using technology, family and friends and regularly taking prescription medication will influence the evaluation stage of the decision making process.

Proposed Methodology

Given this study adopts the determinant attribute approach to understanding community pharmacy selection in Australia, a structured self complete questionnaire with predetermined

rating scales was deemed to be the most appropriate instrument. The majority of the questionnaire uses a dual questioning approach which has been used in past literature to elicit determinant attributes (Franic et al., 2005; Myers and Alpert, 1977). It lists a series of statements and asks the respondent to indicate how important each statement is to them and whether they think there is a difference between the pharmacy channels for each statement. Determinance is measured by multiplying the mean importance score by the mean difference score for each factor (Franic et al., 2005). While sampling all types of pharmacy users would have provided more comprehensive results, the time limitations imposed on this study restricted analysis to one channel of pharmacy patrons. Community pharmacy patrons were chosen as the best unit of analysis as they make up 90% of pharmacy patrons in Australia, are easily accessible, can be questioned whilst undertaking the behaviour this study attempts to understand and possibly use other retail pharmacy channels.

Discussion of the Study's contribution

This study provides both academic and managerial contributions to the retail pharmacy market literature. It focuses on extending consumer behaviour theory to explain pharmacy channel selection in Australia. There are potential three main theoretical contributions from this research. Firstly an analytical model of pharmacy channel selection was developed based on multi-attribute store image theory and social cognitive theory. Previous studies assumed that channel selection could be viewed through the same framework as store selection (Black et al. 2002); however this study develops a model that includes individual influences and is flexible enough so that new explanatory variables can be added or deleted given the evolving nature of retail pharmacy channels in Australia. Secondly, the study applies the determinant attribute theory to community pharmacy selection when consumers have the choice between community, online, mail-order pharmacies and convenience store channels. Previous studies on pharmacy patronage have focused on selecting a store from within a single channel. Thirdly, to our knowledge this is the first study of the determinants of community pharmacy selection in Australia.

On a managerial level, this study will help Australian pharmacies effectively focus their marketing efforts to increase consumer patronage and profitability. Understanding the unique needs of different market segments and what influences their decision to select a pharmacy channel will help existing and emerging pharmacy channels to differentiate their product and service offerings to increase market share (Franic et al., 2005). It will also help reduce costs through identifying which service offerings are valued or not valued by their target customers (Vargo and Lusch, 2004).

Global Application

Most studies on pharmacy selection have been conducted in the United States of America (USA), where pharmacy regulations are more relaxed than in Australia and Europe. In Europe, there is widespread debate about deregulation of community pharmacies in terms of ownership and location (Pharmaceutical Group of the European Union [PGEU], 2006). Deregulation of pharmacies in Britain has allowed supermarkets to co-locate pharmacies and reduce the price of medication by up to 30% (ACIL Tasman, 2005). However in Ireland and the Netherlands, deregulation has reduced the level of access to pharmacy based care with a clustering of community pharmacies in affluent urban areas and the closing down of

pharmacies in less profitable areas (PGEU, 2006). Moreover, Mäkinen, Rautava and Forsström (2004) question the suitability of online pharmacies given Europe's internal market area and the lack of online pharmacies based in Europe. Given these issues, developing an understanding of the determinant factors which influence pharmacy channel selection is of importance to pharmacy owners around the world.

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