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Customers Loyalty to the Retail Pharmacy: Present and Future of the Portuguese Market

Leandro Pereira, Ph.D PMP
BRU-Business Research Unit
ISCTE - Instituto Universitário de Lisboa
WINNING LAB
Lisbon, Portugal
leandro.pereira@iscte-iul.pt

Letícia Quental, MSc
ISCTE - Instituto Universitário de Lisboa
Lisbon, Portugal
leticia.a.quental@gmail.com

Renato Lopes da Costa, Ph.D.
Business Research Unit – BRU-IUL
ISCTE - Instituto Universitário de Lisboa
Lisbon, Portugal
renatojlc@gmail.com

Álvaro Dias, Ph.D
Universidade Lusófona de Humanidades e Tecnologias
ISCTE - Instituto Universitário de Lisboa
Lisbon, Portugal
alvaro.dias1@gmail.com

Rui Gonçalves, Ph.D.
PIAGET Almada
Almada, Portugal
ruiahgoncalves@gmail.com

Leandro Pereira is Professor of Strategy and Management at ISCTE Business School. He holds a Ph.D. in Project Management. He is also CEO and Founder of WINNING Scientific Management. Dr. Pereira is also former President of Business Case Institute, PMI Portugal Chapter and Training Specialist of the Court of Auditors. As CEO, Dr. Pereira receives from Best Teams Leaders the award of Best Team Leader and CEO of Portugal in 2017 in Portugal. He is also PMP from PMI and ROI certified. As researcher, he published more than 80 scientific publications and 10 books. As student, he received the best student award from University of Minho. Dr. Pereira is an international expert in Strategic Management, Project Management, Benefits Realization Management, and Problem Solving.

Letícia Quental is Master Science at ISCTE Business School in Applied Management. Letícia is management consultant in community pharmacies, with intervention in Economic and Financial, Operational, Commercial and Human Resources projects. She is client-focused and has the ability to adapt to new contexts. The main interest areas are economic, financial management and operations management.

Renato Lopes da Costa. PhD in General Management, Strategy and Business Development by ISCTE (Portugal) has articles published in several specialized journals in the East, the United States, Canada, Africa, South America and Portugal. He is currently a researcher and member of BRU-UNIDE and a professor at INDEG where he holds the post of director of the MScBA (Master in Business Administration) and guides students in the development of master's and PhD theses. Teaches business strategy modules in executive and post-graduate master's degrees. Since 2013 he has also accumulated teaching duties as an invited professor at the Military Academy where he teaches the Knowledge Management.

Álvaro Dias is Professor of Strategy at Instituto Superior de Gestão and ISCTE-IUL, both in Lisbon, Portugal. He got his PhD in Management from Universidad de Extremadura, Spain, after an MBA in International Business. Professor Dias has over 24 years of teaching experience. He has had several visiting positions in different countries and institutions including Brazil, Angola, Spain, Poland and Finland. He regularly teaches in English, Portuguese, and Spanish at undergraduate, master and doctorate levels, as

well as in executive programs. Professor Dias has produced extensive research in the field of Tourism and Management, including books, book chapters, papers in scientific journals and conference proceedings, case studies, and working papers.

Rui Gonçalves holds a PhD in Management from Instituto Superior de Economia e Gestão, with research in information systems for operational risk management, a Master in Statistics and Information Management from NOVA Information Management School (NOVA IMS), with research in the area of Intelligent Agents, and a degree in Business Management from the International University. He is currently a Guest Assistant Professor at NOVA IMS and works as Manager in the Business Expertise division at SAS Portugal. In recent years, he has coordinated the areas of Operational Risk, Compliance, Fraud, Audit and Money Laundering.

Abstract

Pharmacies should retain their customers to ensure their sustainability. The most relevant factors for this are store experience, technological evolution, digital presence, portfolio of services and quality of counseling. The analysis of the methodology was carried out by the "Pereira Problem Solving Research Methodology" and with the research goals it was intended to understand the causes of the lack of loyalty, the trend, loyalty strategies, its benefits, and the impact of the loss of proximity. The results allow us to understand that there is less customer loyalty. The main impact of the loss of proximity is the lack of pharmaceutical advice. The main reason for the lack of loyalty is the greater convenience in making purchases in other places. The best strategy to retain customers is to guarantee the quality of the counseling provided. There are benefits in this loyalty, like a greater knowledge of the customer's consumption history.

Keywords: Pharmacy, Customer, Loyalty, Engagement, Communication, Proximity

1. INTRODUCTION

In Portugal, community pharmacies have not only a role of dispensing medicines and health products, but they are also social agents and an integral part of the health care system (Nunes et al., 2015). With the Corona virus pandemic (COVID-19) the social role of pharmacies in primary health care became even more relevant, as highlighted by the World Health Organization (Fernandes, 2020). However, June 2021 market data show that, although sales volume in the first half of the year remained similar year-on-year (+0.6%), the number of visits to the pharmacy decreased slightly (-1.0%). In this sense, pharmacies need to adapt to the economic and social changes resulting from the pandemic, in terms of how they communicate with their customers, in order to retain the ones they already have and attract new ones (Batista et al., 2020). Capturing new customers will be crucial to increase sales, but retaining existing customers is even more

relevant. Studies show that customer loyalty is a crucial factor for customer retention, and that this has a very important role in the success of a business (Lostakova and Horakova, 2014), (Nitadpakorn et al., 2017).

In addition to having to ensure the retention of their customers, pharmacies also need to attract new customers, particularly those who prefer to shop in para-pharmacies at e-commerce. June 2021 market data show that 11.8% of over-the-counter medicines (OCT) sold in the 2nd quarter of this year were purchased in para-pharmacies, as well as 21.3% of health and wellness products (HBS). The sale of pharmaceutical products online, although not a trend in all countries, has been increasing and has increased with the pandemic of COVID-19 (Santos et al., 2021). In the United States, for example, online sales of pharmaceutical products already had a weight of 33.3% in 2018 (Liu et al., 2020).

Thus, creating a differentiating experience for the customer is crucial not only to keep them prioritizing face-to-face shopping (Pina and Dias, 2021), but also for pharmacy loyalty and to ensure the economic sustainability of the business. According to what An and Han (2020) suggest, the pharmacy must promote, in addition to its products and services, its own brand, which captures and retains customers. In this sense, the research problem of this research is "**pharmacies have not been able to increase their market share and therefore it is important to know strategies for customer loyalty to community pharmacies**", to increase the proximity between the parties and to capture new customers and retain existing ones. Due to COVID-19 and the emergence of para-pharmacies and *e-commerce* is being lost the ability to attract and retain customers, so it is essential to find effective strategies of approach between both parties. As such, the main objective is to understand the causes for the lack of loyalty, and its impact of the loss of proximity.

The article is structured as follow: section two presents the theoretical framework; section three details the methodology used in this study; section four and five describe the results and discuss them; in the last section, section six, are presented the final remarks and conclusions.

2. THEORETICAL FRAMEWORK

Community pharmacies are a central element of the primary health care network in Portugal (Policarpo et al., 2019). According to Pordata data, in 2020 there were 2922 pharmacies in Portugal, which represents about 2.8 pharmacies/10000 habitants. However, market data suggest that sales in 2021 are stagnant (0.6% increase in the 1st half year on year), with a slight decrease

in the number of attendances (-1%) which, although not significant, shows that pharmacies are not increasing their market share.

With the pandemic of COVID-19 consumer behaviour changed, causing the retail industry to adapt to the "new normal (Dias et al., 2021a)," which caused uncertainty in sectors such as economics, management, and healthcare and transformed how society and business plan (Santos et al., 2021), (Öncü et al., 2021). To ensure business sustainability, pharmacies will have to rethink how they relate to their customers. The isolation caused by the pandemic has made the consumer have a greater need for connection, so it is crucial that companies can build customer loyalty (Santos et al., 2021). The connection created between a customer and the business contributes to customer retention as it increases customer satisfaction and trust (Nitadpakorn et al., 2017; Godinho et al., 2018). Currently most businesses have 'temporary' customers, i.e. customers who are loyal to the business only until such time as another similar business offers added value. Pharmacies are no exception, so it's crucial that they start focusing on attracting and retaining customers through strategies that meet the needs and expectations of customers, that attract, retain and make them loyal, creating close ties with the pharmacy.

The pharmacy must add value to the customer when the customer comes to the pharmacy, understand what the customer wants, what their needs and loyalty requirements are, in order to have more customers and customers who buy more from the pharmacy (Lostakova and Horakova, 2014), (Policarpo et al., 2019). In addition to focusing on selling their products and services, pharmacies will also need to promote themselves to the consumer as a brand. Differentiating and personalized shopping experiences will be factors valued by the customer, very relevant when choosing which pharmacy to go to (An and Han, 2020), (Santos et al., 2021), (Jamett and Schweizer, 2021).

Furthermore, with the emergence of parapharmacies, which also sell OTC and HBS, sales of these products in pharmacies have been impacted: market data for Q2 2021 show that 11.8% of OTC and 21.3% of HMR sold in this period were in parapharmacies. It will therefore be crucial for pharmacies to retain their customers and attract new customers, not only from competing pharmacies, but also from parapharmacies and e-commerce. Thus, pharmacies will have to work to increase the loyalty of their customers. Customer satisfaction increases customer loyalty, making them trust the pharmacy and being a competitive advantage in creating a lasting relationship with the customer (An and Han, 2020). Studies show that the increase in sales of a

business is intrinsically related to its ability to have loyal and loyal customers (Nitadpakorn et al., 2017).

A loyal customer makes consecutive and frequent purchases, has a good opinion about the pharmacy, and provides feedback about the products purchased (Chetthamrongchai et al., 2019). Capturing new customers is a key factor in any business. However, customer retention is even more important and advantageous: the operational costs associated with retaining a customer are lower than those associated with acquiring new customers, and repeat customers have a positive word-of-mouth effect among their acquaintances, which may lead the pharmacy to acquire more customers (Nitadpakorn et al., 2017; Chetthamrongchai et al., 2019). A customer perceives value in a business when he feels that he is an integral part of it, and that his opinion is relevant (An and Han, 2020). Studies show that a consumer's decision to shop repeatedly at the same pharmacy does not depend on the pharmacy's prices or visual appearance, but on the quality of service offered. The customer's assessment of the quality of service depends on physical (location of the pharmacy, equipment available) and human (quality of advice provided) factors (Nitadpakorn et al., 2017). Overall customer satisfaction depends not only on their evaluation based on the products/services purchased, but also on the in-store experience (Godinho et al., 2018).

In Portugal, community pharmacies can operate on three fronts: (i) sale of products and services; (ii) provision of pharmaceutical advice; (iii) promotion of good health practices in the community where they are located. In this sense, pharmacies must rethink their business strategy in order to ensure that consumers value their role in society (Nunes et al., 2015). To increase the levels of satisfaction perceived by their customers, pharmacies may choose several approaches, including changing their in-store communication strategy, communication channels used, services offered, or technological innovation implemented (Hamilton, 2009).

2.1. Experience in store

Retail has long tried to gain a competitive advantage over competitors by providing customers not only with an enjoyable in-store experience, but also by delivering an impactful and memorable experience. Consumers increasingly feel the need to have their own in-store journey that gives them the feeling of personalized service and are willing to pay for *premium* experiences (An and Han, 2020). Creating consumer value within the pharmacy starts with the in-store experience - if consumers perceive the pharmacy as a personalised store, where they can have innovative and

enjoyable shopping experiences that enhance their lifestyle, the pharmacy will be remembered by the consumer as special, and this is a key factor in attracting and retaining customers. To this end, the pharmacy should provide the consumer with an environment in which they can easily meet their needs and interact with other customers and staff (Castaldo et al., 2016; An and Han, 2020). Some relevant requirements to increase customer loyalty and retention are as follows: (i) offering high quality products and services (including easy access to the pharmacy and extended opening hours); (ii) varied range of products and sufficient stock; (iii) in-store service that stands out from the competition; (iv) clear and effective communication with the client; (v) sharing of relevant information with the customer (in-store and remotely); (vi) creation of loyalty programs (customer card, discounts on future purchases, offer of samples and extra services) (Lostakova and Horakova, 2014; Castaldo et al., 2016).

When the consumer makes a purchase decision, he/she analyses relevant data, such as recommendations from acquaintances, memories of past experiences or previous knowledge about the product/service. The memories of past purchase experiences in the pharmacy can influence not only the purchase decision of a consumer, but also the *feedback that* he/she gives in his/her social environment, by "passing the word" (An and Han, 2020).

Pharmacies should invest their resources so that during the various moments of the customer purchase journey, the customer is stimulated (Avanzi et al., 2020; Dias et al., 2021b). Also, to guide consumer behaviour within the pharmacy and to have a competitive advantage against the market, the use of technologies will be essential (Gong et al., 2021).

2.2. Technological developments

Retail stores are increasing consumer use of technology at the point of purchase exponentially (Gong et al., 2021). It is of most importance that pharmacies adapt to be increasingly technological, providing a different experience to each customer inside the store, improving the quality of service provided and increasing interaction with customers (Deloitte, 2020), (Santos et al., 2021).

A new type of retail store is emerging and revolutionizing the customer experience - *Phygital* - which unites the experience of the digital with that of a physical store. With the new technological trends in the market, it becomes crucial that the physical spaces of pharmacies are redesigned so that they can provide immersive experiences to their customers, so that they connect with the "pharmacy" brand and its products (Santos et al., 2021). According to self-determination

theory, experiences such as the use of technology in retail stores enhance the customer journey (An and Han, 2020). It is increasingly common to see retail stores integrating technology into the in-store customer experience, and pharmacies will need to keep up with this revolution in the marketplace to move from being just convenience stores to health outlets. This change has already started to happen through drug dispensing *robots* or automated machines for payment, but it will also have to be extrapolated to the store, where the customer will also be included (Gong et al., 2021).

Technology may allow customers to take less time shopping at the pharmacy, avoid queues for payment by being able to do it autonomously at a machine, make a more autonomous and simultaneously informed selection of products to be chosen at the shelves through interactive screens, making them feel that there is a higher quality of service provided and associate the pharmacy with attributes such as added value and satisfaction, improving their in-store journey (Deloitte, 2020; Gong et al., 2021). Also, by decreasing the time it takes for staff to find the desired medications or process payment, technology allows staff to spend more time in direct contact with the customer and improves the quality of advice provided (Deloitte, 2020). Studies show that the benefits of using in-store technology include customers' perceptions of faster service, greater convenience, and control of the shopping journey, improving pharmacy loyalty (Grewal et al., 2020; Gong et al., 2021).

Pharmacy must take an even bigger risk in its technological revolution: with the COVID-19 pandemic, remote health services have gained relevance. Communicating with more isolated consumers or with health conditions that prevent them from leaving home has become fundamental, to meet the physical and social needs of everyone, regardless of their geographical location. In this sense, teleconsultations of medicine have started to be carried out frequently and to be increasingly part of the "new normal". Thus, pharmacies will have to be an integral part of this "digital health": the pharmacy will be able to provide advice by video call, supported by a complementary home delivery service (Iyengar et al., 2020; Öncü et al., 2021).

2.3. Digital presence

In addition to in-store sales, pharmacies can also capitalize on their online sales, which allow customers to shop remotely and from the convenience of their home (Hamilton, 2009). Although consumers still do not purchase many prescription drugs (PD) online, this trend is changing, and

purchases in pharmaceutical stores with an online presence have been increasing, already accounting for about 33.3% of US pharmaceutical market sales in 2018 (Liu et al., 2020). The portfolio of products researched by customers online is similar, though more targeted: customers typically buy only the product they want, and it is more difficult for the pharmacy to provide additional advice that can be cross sold (Hamilton, 2009).

Currently, not all pharmacies have a presence in the digital environment and the possibility of distance shopping. However, the digital revolution is a trend, and pharmacies that do not join it will be at a great disadvantage (Liu et al., 2020; Santos et al., 2021). According to a study by McKinsey & Company (2020) it is expected that about 25% of consumers in the United States and Europe will increase their consumption through digital channels. The digital economy will play an increasingly more established role in society, giving rise to *Branding 4.0*, in which the digital business revolution will be the new strategy to attract customers and create relevant content for them. To this end, the pharmacy will have to ensure its online presence in social networks, e-commerce, and websites, to ensure coexistence between online and offline interaction with customers (Santos et al., 2021).

In order to ensure strategic alignment in their sales and to impact their customers, even at a distance, the pharmacy will have to rethink its communication on e-commerce platforms: give the customer the possibility of teleconsultations with pharmacists for professional advice on the products purchased - such as dosage, how to take them or drug interactions - or create purchase suggestions on the website - for example, the brand of generics that they recommend, or inclusion of advice protocols with indication of specific products that potentiate targeted sales (Hamilton, 2009). Furthermore, since the logistics associated with online shopping is the factor most valued by customers, pharmacies can increase the quality of their service and, consequently, customer satisfaction by improving product delivery time and developing a home delivery service as independent from third parties as possible (Liu et al., 2020).

2.4. Pharmaceutical services

Community pharmacies have long provided their customers not only with products but also with services, including individualized medication preparation, home delivery, smoking cessation programs, hospital drug delivery, and administration of vaccines and injectables (including the flu vaccine). These services are a way to differentiate from direct competition by providing services

that nearby pharmacies do not have, and from para-pharmacies and *e-commerce*, where most of these services cannot be performed (Martins and Queirós, 2015; Nunes et al., 2015).

Despite the growing increase in the number of services provided, the value has not been very prominently reflected in sales: in 2011 pharmaceutical services represented about 0.1% of pharmacy sales and in the 1st semester of 2021 they represented 0.2% (Martins and Queirós, 2015), (Health market research, 2021). However, the importance of pharmacies as providers of pharmaceutical services was highlighted with the performance of rapid tests to "covid-19" (in the 1st semester of 2021, 546,000 tests were performed in pharmacies), which allowed accelerating the testing of the population, as reported by the newspaper Público on July 16, 2021, in the news entitled "Pharmacies have already performed about 546 thousand rapid tests' to covid-19 since January".

Thus, pharmacies will have to rethink their business strategy, which will no longer pass only through the dispensation of medicines and health products but will also have to include services that meet their customers' needs. A study by Martins and Queirós (2015) showed that pharmacies with greater competition tend to offer a broader portfolio of services to their customers, especially services such as vaccination, special programs of therapeutic adherence or monitoring of the user. The connection between physical and digital space can be achieved not only through equipment, but also through personalized services for each customer (such as special offers or home deliveries), which will create an emotional connection between the customer and the pharmacy (Santos et al., 2021).

A personalized service network can bring customers customized solutions, which will be a key alternative in maintaining business competitiveness and customer loyalty to the pharmacy (Hamilton, 2009; Nunes et al., 2015). The purchasing power of consumers positively influences their willingness to pay for pharmaceutical services, and this may be a factor to be considered by pharmacies in their decision making about adding services to their portfolio (Martins and Queirós, 2015).

A study conducted in Portuguese pharmacies by Policarpo et al. (2019) showed that the five services that customers would most value having access to in pharmacies would be the following: (i) possibility of automatic renewal of prescriptions in chronically ill users; (ii) support in the management of chronic diseases; (iii) home delivery of medicines; (iii) additional health care (e.g., wound care and first aid); (iv) dispensing of hospital drugs with monitoring of the

treatment by the pharmacist.

Some of these services can already be made available by pharmacies, and those that provide them will add value to their customers, since it has been demonstrated that by increasing the supply of services available, the pharmacy maximizes its gains in consumer satisfaction (Hamilton, 2009). When customers are satisfied with the services provided by a pharmacy, they will continue to frequent the pharmacy, encourage their social circle to do the same, and provide constructive feedback to the pharmacy, allowing it to continuously improve its services (Nitadpakorn et al., 2017).

Pharmacies should develop and implement innovative services to meet the needs of their customers and add value to the customer's trip to the store to maximize their ability to act in the community as a health care provider (Ayalew et al., 2017; Policarpo et al., 2019).

2.5. Advice provided

Some time ago, professionals working in pharmacies stopped being only "dispensers of medicines" and were able to play an active role in Portuguese society as members of an integrated health care system, through the advice provided (Nunes et al., 2015; Policarpo et al., 2019). Pharmacy staff members can work in synergy with other health professionals in order to achieve the best results in their contribution to increasing the quality of life of their patients (Ayalew et al., 2017).

The quality of the pharmaceutical advice provided directly influences the customer's commitment to a pharmacy. Customers value aspects such as the fact that the questions asked and the medication provided meet their needs, as well as the friendliness, trust and confidence conveyed by the professional (Castaldo et al., 2016), (Nitadpakorn et al., 2017). Studies show that, in health care settings, trust in the professional is crucial for the client (Patrícia Antunes et al., 2015), (Castaldo et al., 2016). The quality of pharmaceutical advice and its clarity in communication has a much greater influence on consumer loyalty than the price positioning or visual appearance of a pharmacy (Patrícia Antunes et al., 2015; Nitadpakorn et al., 2017).

While the pharmacy's ability to meet a customer's needs regarding the products they are looking for influences their satisfaction, the quality of the advice provided influences the customer's loyalty to the pharmacy, which leads to customer loyalty (Nunes et al., 2015), (Castaldo et al., 2016).

Studies conducted in Australian and Portuguese pharmacies showed that the quality of

pharmaceutical advice is increasingly relevant and valued, and that it is directly related to repeat purchase at the same pharmacy: respondents reported trusting the information provided by pharmacists about their medication (therapeutic needs and dosages) and how this advice decreased their health concerns (Nitadpakorn et al., 2017; Policarpo et al., 2019). In the study conducted by Policarpo et al. (2019) in Portuguese pharmacies, 54% of respondents stated that the pharmacy is the first place they go to when they have a question related to their health.

Thus, to ensure the quality of the pharmaceutical service provided, pharmacies have to ensure that their employees have good social skills and technical skills, which translate into good communication with the customer, with clear and relevant information, friendliness and reliability. Training the technical skills and relational skills of the team is fundamental to ensure customer satisfaction and build trusting relationships between customers and employees (Patrícia Antunes et al., 2015; Castaldo et al., 2016; Chetthamrongchai et al., 2019).

2.6. Conceptual model

The literature review provided a comprehensive knowledge about the state of the art of the relationship between pharmacies (or other retail stores) and their customers, allowing to identify gaps and/or themes to be explored in greater depth, as listed in Table 1.

The five most relevant factors for increasing proximity between community pharmacies and customers are creating a unique in-store experience, the ability of technology available to customers and employees to improve service quality, online pharmacy presence, available pharmacy services, and quality of counseling. After the literature review, it is essential to understand which topics are most relevant to the study that will be conducted.

Table 1 - Identification of the main themes and related articles

<i>Main theme</i>	<i>Author</i>	<i>Title</i>	<i>Publication (year)</i>
In-store experience - the literature shows that the customer's journey within the store, the quality of service provided and the ability to make their experience personalized	1. Iostakova and horakova	1. Usefulness of Tools to Enhance Retention and Loyalty in Purchasing OTC Drugs from the Perspective of Clients of B&M Pharmacies	1. Procedia - Social and Behavioral Sciences (2014)
	2. Castaldo et al.	2. The missing path to gain customers loyalty in pharmacy retail: The role of the store in developing satisfaction	2. Research in Social and Administrative Pharmacy (2016)
	3. An and Han		3. Journal of

influence their ability to build loyalty		and trust 3. Effects of experiential motivation and customer engagement on customer value creation: Analysis of psychological process in the experience-based retail environment	Business Research (2020)
Technological developments - the articles analyzed argue that the technology available in store influences consumer behavior, including the possibility of teleconsultation for pharmaceutical advice	1. Gong et al. 2. Iyengar et al. 3. Grewal et al.	1. effects of characteristics of in-store retail technology on customer citizenship behavior 2. Learning opportunities from COVID-19 and future effects on health care system 3. The future of in-store technology	1. Journal of Retailing and Consumer Services (2021) 2. Diabetes & Metabolic Syndrome: Clinical Research & Reviews (2020) 3. Journal of the Academy of Marketing Science (2020)
Digital presence - the literature suggests that as online sales increase, pharmacies will also need to sediment their position in this market, including their ease of communicating remotely with the customer	1. Liu et al. 2. Santos et al.	1. Consumers' satisfaction factors mining and sentiment analysis of B2C online pharmacy reviews 2. Covid-19's Impact on Society, Fashion Trends and Consumption	1. BMC Medical Informatics and Decision Making (2020) 2. Strategic Design Research Journal (2021)
Pharmaceutical services - according to several authors, most customers value pharmaceutical services, being a relevant factor in differentiating themselves from the competition	1. Policarpo et al. 2. Martins and Queirós	1. A new model for pharmacies? Insights from a quantitative study regarding the public's perceptions 2. Competition among pharmacies and the typology of services delivered: The Portuguese case	1. BMC Health Services Research (2019) 2. Health Policy (2015)
Advice provided - the	1. Nitadpakorn et	1. Factors affecting pharmacy	1. Pharmacy Practice

various articles reviewed suggest that the quality of advice provided and the communication and social interaction skills of pharmacy professionals are crucial to customer retention	al. 2. Chetthamrongchai et al. 3. Castaldo et al.	engagement and pharmacy customer devotion in community pharmacy: A structural equation modeling approach 2. The Mediating Role of Pharmacy Engagement on the Relationship of Perceived Service Quality, Customer Perception, Price Strategy with Pharmacy Customer Devotion 3. The missing path to gain customers loyalty in pharmacy retail: The role of the store in developing satisfaction and trust	(2017) 2. Sys Rev Pharm (2019) 3. Research in Social and Administrative Pharmacy (2016)
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Source: author

In this sense, the author focused the research objectives in understanding what are the main causes of lack of customer loyalty, what is the impact of loss of proximity between pharmacies and customers, how is the trend of customer loyalty to pharmacies evolving, what will be the best strategy to build customer loyalty and what benefits may result for both parties in the loyalty of a customer to a pharmacy.

3. RESEARCH METHODOLOGY

Prior to the definition of the research methodology of this work, the existing literature on the subject was analysed to understand the main strategies of approaching customers to pharmacies, analysing perspectives of several authors and studies, to collect information about the work already developed on this theme and to identify relevant areas of work that need to be deepened, to define the research work to be developed a *posteriori*. The analysis of the research methodology was performed considering the "Pereira Problem Solving Research Methodology" (Pereira et al., 2021), as shown in Figure 1. This methodology provides guide to address business and management problems. It is an integrative and easy-to-use instrument that helps organizations adopt scientific management practices and will enhance the efficiency of the solutions encountered.

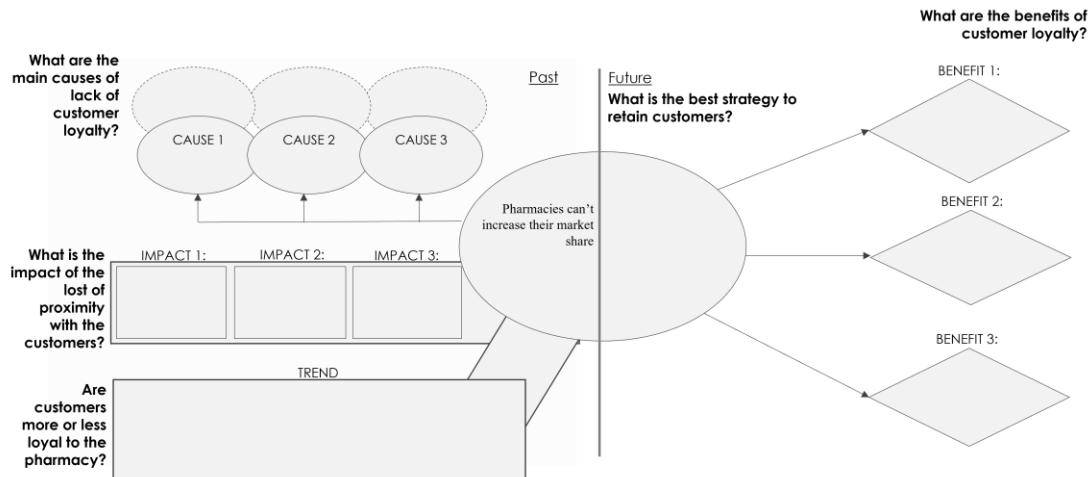


Figure 1 - Diagram of the research methodology

Source: adapted from Pereira et al. (2021)

Thus, to understand what are the main causes that may be causing pharmacies not to increase their market share and not to ensure customer loyalty, as well as the impact of this problem, individual interviews were conducted in a convenience sample consisting of 10 pharmacy managers (owners and/or technical directors), 20 pharmacy employees, and 20 customers. To this end, the research objectives were first outlined, as listed in Table 2.

Table 2 - Identification of research questions and objectives

Research question	Research goal
Are customers more or less loyal to the pharmacy after COVID-19?	Market trend analysis
What is the impact of the loss of customer proximity?	Know the qualitative impacts of the loss of proximity to the customer
What are the main causes of the lack of customer loyalty?	Identification of the main causes of stagnation of the community pharmacy market
What is the best strategy to build customer loyalty?	Collection and analysis of solutions to solve the problem
What are the benefits for pharmacies in building customer loyalty?	Discover the qualitative impacts on customer loyalty

Each interview lasted approximately 8 minutes and consisted of 9 questions: 1 of control variable (question 1), 3 of sample characterization (question 2-4) and 5 of research questions (question 5-9).

To analyse the market trend regarding customer loyalty to the pharmacy, the question "Do you think customers are more or less loyal to the pharmacy after COVID-19?" was asked. To know the qualitative impacts of the loss of proximity between customers and pharmacies the question "What is the impact of the loss of proximity between pharmacies and customers caused by COVID-19 and/or *e-commerce* or para-pharmacy sales?". To identify the main causes of stagnation of the pharmaceutical market, the respondents were asked "What are the main causes of the lack of customer loyalty to pharmacies?". To understand what the best strategy is to build customer loyalty, it was made the question "Of these 5 factors, identify the 2 that you consider to be the best strategy to build customer loyalty: in-store experience, technological evolution, digital presence, pharmaceutical services and pharmaceutical advice". Finally, it was questioned the interviewees about "What are the main benefits for the pharmacies by making their customers loyal? " to know the impacts on customer loyalty.

4. RESULTS

The target population of the individual interview was defined by pharmacy customers, employees and managers (owners and/or technical directors), as they had the necessary knowledge to answer the questions. A non-probability, convenience sampling was performed through individual invitation by the author to each of the interviewees. The interviews were conducted between August 30 and September 10, 2021.

4.1. Characterization of the sample

The sample was composed of 50 respondents: 20 clients, 20 employees and 10 managers. The control variable involved a minimum pharmacy attendance of 6 times per year (clients), a minimum professional experience in pharmacy of 2 years (employees) or a minimum experience in pharmacy management of 5 years (managers). The average age of the interviewees is 45.5 years old, 34% of the interviewees being male and 66% female. Most respondents reside in the municipality of Lisbon (32%) and Odivelas (24%).

4.2. Analysis of the impact of the loss of proximity to customers

The analysis of the impact of the loss of proximity between pharmacies and customers caused by COVID-19 and/or by *e-commerce* sales or para-pharmacies was done through a Pareto diagram, in order to understand which causes have the greatest impact (Figure 2).

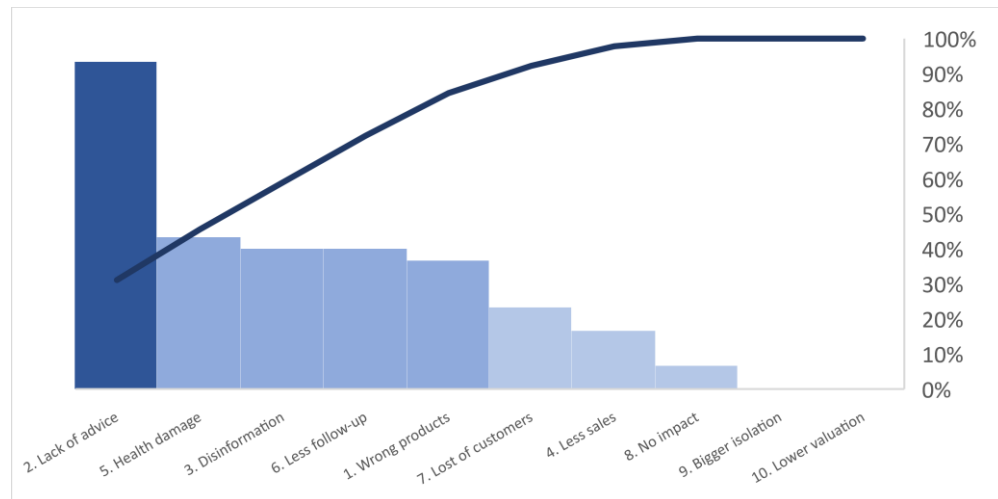


Figure 2 - Pareto diagram with analysis of the impact of loss of proximity

Legend: Impact 1- Purchase of inappropriate and/or unnecessary products; Impact 2- Lack of pharmaceutical advice; Impact 3- Misinformation of the user; Impact 4- Decrease in sales of MNSRM and PSBE; Impact 5- Damage to health due to self-medication or inappropriate medication; Impact 6- Less therapeutic monitoring of the user; Impact 7- Loss of customers; Impact 8- No impact; Impact 9- Greater isolation of users; Impact 10- Loss of importance of the role of pharmacies in the health of the community where they are inserted

Source: author

By analysing the graph, the greatest impact of this loss of proximity is the lack of pharmaceutical advice that the customer will have when choosing to buy products elsewhere. It is also possible to notice that this is also the main impact indicated by them. However, for pharmacy managers, the main impacts will be damage to the patient's health due to self-medication or inappropriate medication, less therapeutic monitoring of the patient and loss of customers to the pharmacy.

4.3. Loyalty trend analysis

The analysis of responses to the question "Do you think customers are more or less loyal to the pharmacy after COVID-19?" was done using a word cloud and mind map, as shown in Figures 3 and 4, respectively.



Figure 3 - Word cloud with loyalty trend analysis

Source: author

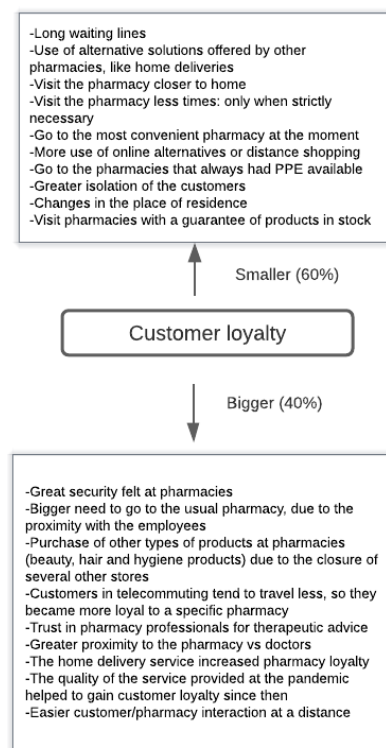


Figure 4 - Mind map with loyalty trend analysis

Source: author

According to 60 percent of respondents, the trend toward pharmacy loyalty has decreased, the result of factors such as use of alternative solutions offered by other pharmacies, demographic or workplace changes in customers, or choosing the most convenient pharmacy at the time of need. In pharmacies with home delivery, the trend of customer loyalty has increased, as highlighted in the word cloud. Telecommuting was a very relevant factor in changing the consumption habits of customers, who started not only frequenting pharmacies closer to their residence, whereas before they used to frequent pharmacies close to the workplace, but also started consuming new types of products in pharmacies (e.g., from the beauty, hair, or hygiene segments). There is also a reduction of monthly visits to the pharmacy, with an increase in the amount consumed per visit. The fact that customers lose loyalty to the pharmacy makes them opt for pharmacies with differentiating factors,

such as short waiting times for service, home delivery service, possibility of distance purchasing and guarantee of products in stock, namely, at the beginning of the pandemic, personal protective equipment (PPE). This loss of customer loyalty to the pharmacy is felt more by managers (80% say there is less loyalty). In the case of interviewed customers, the number of customers who had lower loyalty is equivalent to those who had higher loyalty.

4.4. Analysis of the causes of lack of loyalty

To analyse the main causes of the lack of customer loyalty, an *Ishikawa* Diagram was performed. As the literature review suggested, the causes presented were aggregated into 5 macro areas: technological evolution, pharmaceutical services, digital presence, in-store experience, and advice provided. Most respondents pointed to factors related to digital presence (66%) and in-store experience (56%) as the primary causes of lack of pharmacy loyalty, as illustrated in Figure 5.

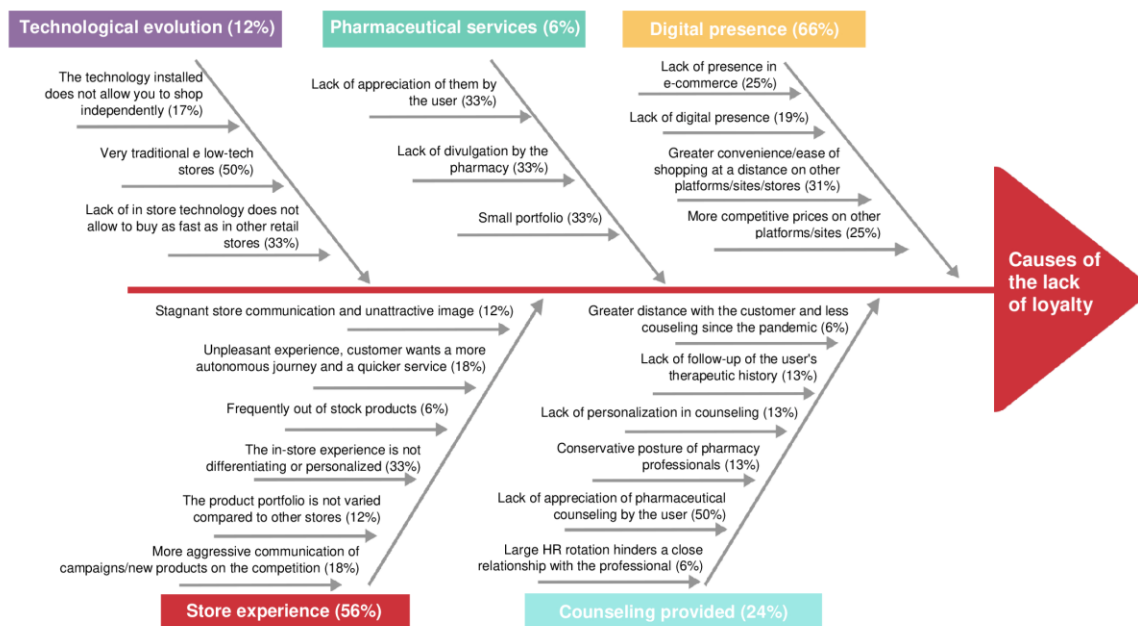


Figure 5 - *Ishikawa* diagram on causes of lack of loyalty

Source: author

The main causes reported for this lack of loyalty were the greater convenience/ease of shopping remotely on other platforms/websites/stores compared to visiting pharmacies in person; a poor in-store experience compared to other retail stores; pharmacies' lack of presence in e-commerce; and the more competitive prices charged by other platforms/websites.

However, analyzing the *Ishikawa* Diagram for each of the respondent types, we notice differences of opinion. For customers, factors related to the in-store experience are the main cause of this lack of loyalty (60%), and only after that do, they suggest factors related to digital presence (50%). It should be noted that the more competitive prices charged by other platforms/websites was a factor much more valued by pharmacy employees and managers than by customers. Also, customers perceive the frequent lack of products in stock as a factor that hinders customer loyalty to pharmacies, this not being a factor valued by the other respondents.

While 15% of customers and 30% of managers pointed to factors related to technological developments as a cause for lack of loyalty, namely the fact that pharmacies are very traditional stores with little technology, no employee suggested this was a cause of lack of loyalty.

Regarding the advice provided, managers and most employees consider that the only relevant factor for the lack of customer loyalty is the lack of appreciation of pharmaceutical advice by the user. However, customers pointed out other factors, such as the lack of monitoring of the user's therapeutic history, the lack of personalization in the advice, the conservative posture of pharmacy professionals and a high turnover of human resources (HR) in pharmacy teams, which hinders a close relationship with the professional.

4.5. Analysis of loyalty building strategies

To make a better correlation between the causes of lack of loyalty and loyalty strategies, an *Ishikawa* Diagram (Figure 6) was also made to understand which are the most relevant factors in customer loyalty.

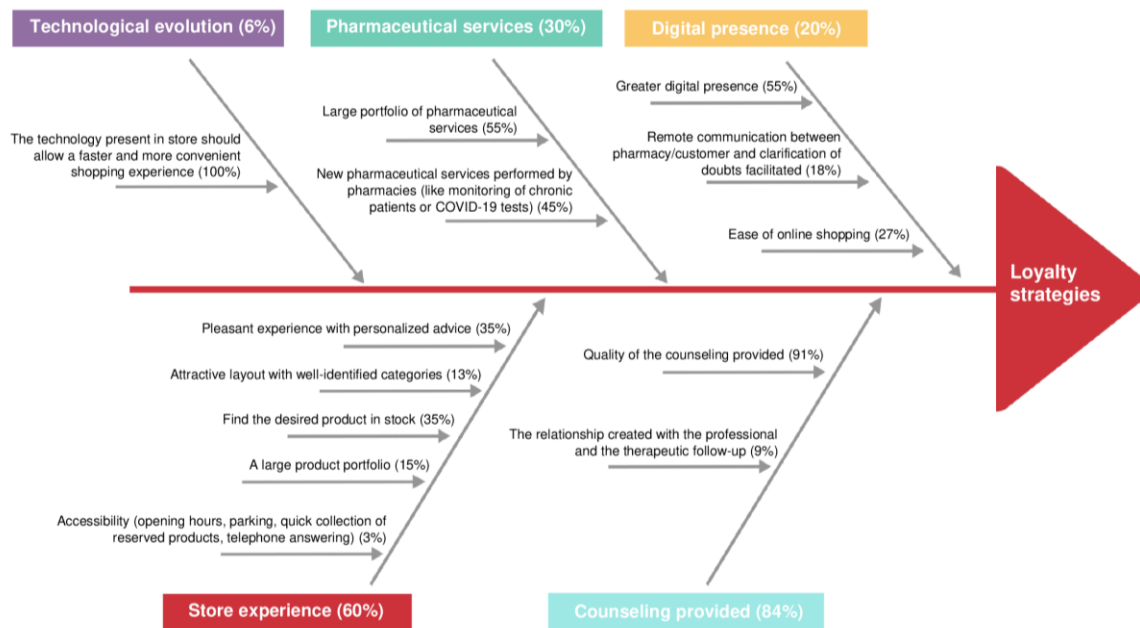


Figure 6 - Ishikawa diagram on strategies for customer loyalty

Source: author

According to the results, the two most relevant factors to build customer loyalty are the advice given (80%), especially the quality of the advice given, which was considered a differentiating factor and essential to build customer loyalty in a pharmacy, and the in-store experience (60%), namely providing the customer with a pleasant experience, with personalized advice, and the customer always having the desired product in stock. Analysing the answers given by all types of respondents, we can see that customers perceive both the in-store experience and the advice given as equally important factors in building customer loyalty, while employees and managers place much more emphasis on the advice given. For customers, finding the desired products in stock is a very relevant factor in building customer loyalty, while employees consider it more relevant to provide the customer with a pleasant in-store experience, with personalized advice.

4.6. Analysis of the benefits in loyalty building

Finally, to analyse the main benefits in customer loyalty, a tree diagram was made to segment the benefits pointed out. There are four types of main benefits, as shown in Figure 7: knowledge of

the user's consumption history, greater knowledge of the customer database, possibility of creating loyalty programs directed to customers and increased sales for the pharmacy.

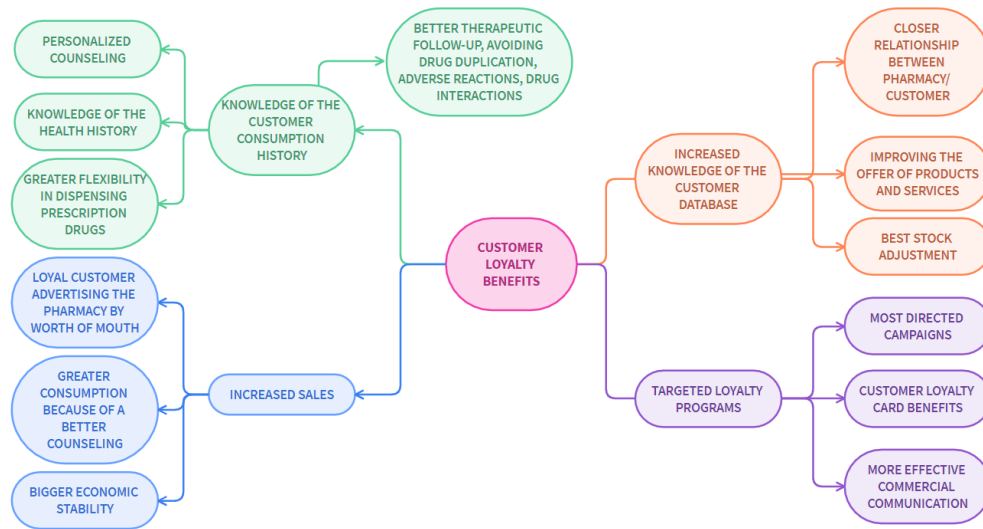


Figure 7 - Tree diagram with the benefits of customer loyalty

Source: author

A better knowledge of the customer's consumption history will be useful for both parties (pharmacy and customer), as it will allow the pharmacy to better monitor the patient's therapy, also by having knowledge of his health history, thus being able to identify adverse reactions or drug interactions, as well as duplication in the patient's medication. Furthermore, by knowing the patient's consumption history, we can provide a more personalized advice, a factor that is so valued by patients. Finally, at a time when the user has difficulty accessing the doctor and prescriptions, as happened during confinement due to COVID-19, the pharmacy may have greater flexibility in dispensing PD by having records of the customer's consumption history.

Another benefit in this loyalty is a greater knowledge of the database of regular customers, which not only creates a relationship of familiarity between both parties, but also allows the pharmacy to have a portfolio of products and services more adjusted to the needs of its customers, as well as having a greater adjustment of stocks, to always ensure enough to meet the needs of its customers.

It will also be possible to create more targeted loyalty programs to your customers, namely campaigns, offer benefits in customer card to loyal customers and direct your commercial communication in a more effective way, since you will know better what customers value and their

needs. Finally, this loyalty leads to an increase in sales, not only because more targeted and personalized advice for the customer allows the pharmacy to meet the customer's needs and thus get them to buy more products and more often, but also because a loyal customer will naturally advertise the pharmacy to their family and/or friends, so that the pharmacy has new customers, which will naturally also increase sales. Finally, with a large portfolio of loyal customers, the pharmacy will have greater economic stability, since it will have a constant guaranteed sales value.

5. DISCUSSION

In the 1st semester of 2021, there was a 0.6% increase in sales and 1.0% decrease in the number of visits. However, despite this slight reduction in monthly visits to the pharmacy, there was an increase in the value consumed per visit - according to market data, the average value per visit increased 3.8% in the 1st semester of 2021. These data are congruent with the results found in customer loyalty: 60% of respondents feel that customers are less loyal to pharmacies, stating that the customer goes less frequently to the pharmacy, but consumes more in each visit, and there is even consumption of new types of products in pharmacies (e.g., from the beauty, hair, or hygiene segments). The main factors for this decrease in loyalty are the use of alternative solutions offered by other pharmacies, such as home deliveries, demographic or workplace changes of customers, or choosing the most convenient pharmacy at the time of need. These data show that home delivery and the possibility of contacting the pharmacy remotely and placing an order played a very important role in customer loyalty to a new pharmacy offering these services. Furthermore, many customers stopped being loyal to a pharmacy because of convenience, opting instead for pharmacies with shorter waiting times, more convenient hours, or easier access. These results are consistent with the study of Lostakova and Horakova (2014), which argues that factors such as pharmacy accessibility and opening hours are valued by customers, as well as the ease of distance contact with the pharmacy. Ayalew et al. (2021) also states that waiting time is a factor that negatively influences customer satisfaction, and therefore it is expected that customers would have stopped going to their usual pharmacy if it had long waiting lines. These results show that it is essential for pharmacies to enable their customers to shop remotely with ease to maintain customer loyalty, given that, according to an article published in October 2020 by Start&Go, most customers (64% of respondents) prefer to shop remotely, with the option of in-store collection.

Another very relevant factor for decreasing customer loyalty to the pharmacy was the

changes caused by telecommuting, which caused customers to go to pharmacies near their place of residence (if their usual pharmacy did not offer a home delivery service, with the possibility of ordering remotely). There was also loss of loyalty due to geographic changes of customers who, while telecommuting, chose to change their place of residence and therefore started going to a different pharmacy. It would be important to understand, in future studies, what is the effective impact of home delivery service in a pharmacy.

The main impact of the loss of proximity of pharmacies with customers is the lack of pharmaceutical counselling that they will have when choosing to buy products in *e-commerce* and/or para-pharmacies, or when reducing their visits to the pharmacy. These results are consistent with the article by Policarpo et al. (2019), in which they argue that pharmacies are no longer only dispensers of medicines but have a relevant role in the community as health care providers, being mainly recognized by customers for their role in supporting the choice of OTC. In the same article it is referred a study done in the Portuguese population, which showed that pharmacies are considered determinants in the health system due to their social role, which validates the importance of the role of pharmaceutical today.

Policarpo et al. (2019) also concluded that one of the factors most valued by users is the role that pharmacies have in supporting the control of their chronic medication, which validates that one of the impacts of this loss of proximity between pharmacy/customer is damage to the user's health, caused by self-medication or inappropriate medication, since they will not be accompanied by the pharmacy professional to monitor their medication.

Studies show that there is a positive effect on patients in a greater intervention of pharmacies in the management of their medication and therapy (Nunes et al., 2015) and, therefore, one of the impacts of the loss of proximity between customer and pharmacies may effectively be a lower therapeutic monitoring of the user, one of the main factors pointed out by pharmacy managers.

As already mentioned, the market share of pharmacies did not increase substantially in the 1st half of 2021. There are customers who are not loyal to pharmacies and choose to make their purchases in alternative places, namely para-pharmacies. This lack of loyalty seems to be related to the greater convenience and ease of shopping at a distance (online shopping) or in para-pharmacies.

However, the second most relevant factor in this lack of loyalty is the fact that the in-store

experience is not very differentiating when compared to other retail stores. The importance of the in-store experience is increasingly relevant for customer satisfaction, as Castaldo et al. (2016) had already analysed in their study: factors such as the in-store environment and communication with the customer are determinant. And, as Hamilton (2019) pointed out, a modernized pharmacy can create a greater connection with the customer than a para-pharmacy, as it can provide more concrete individual solutions for each of its customers. Thus, these results prove that pharmacies need to focus on providing their customers with a unique experience, different from all their competitors, to build customer loyalty. They need to create a differentiating in-store experience and change their strategic positioning, with innovative offerings, more aggressive *marketing* positioning, increased customer communication channels and a good portfolio of products and services.

One of the factors that was also pointed out as an impediment to customer loyalty was the more competitive prices charged by competitors (e-commerce and para-pharmacies). However, this factor was only valued by employees and managers, not being crucial for the interviewed customers. These results are consistent with the results of the study of Chetthamrongchai et al. (2019), which concluded that there is no relationship between the prices practiced by the pharmacy and customer loyalty. In other words, although pharmacy professionals (managers and employees) believe that one of the reasons for the lack of customer loyalty is their pricing positioning in relation to the competition, this factor does not have a relevant contribution to customer loyalty (or lack of it, in this case). On the other hand, as Castaldo et al (2016) argued, the customer values to find in stock the product they are looking for and, therefore, the fact that the customer does not always find the product they want is an impeditive factor of loyalty, not being, however, perceived as such by the interviewed employees and managers.

Data on the role of pharmaceutical counseling in the lack of customer loyalty show that the problem is not that pharmaceutical counseling is not valued by customers, but that customers perceive that the advice provided is not enough to keep them loyal due to lack of follow-up of their therapeutic history, lack of personalization in counseling, conservative attitude of pharmacy professionals, and high turnover of HR in pharmacy teams, which is consistent with the literature review (c.f., Dutschke, et al., 2019), a positive perception of the service provided by the pharmacy professional has a much greater impact on customer loyalty than the pricing positioning or visual appearance of the pharmacy (Nitadpakorn et al., 2017). Thus, as Patrícia Antunes et al (2015)

concluded, pharmacy professionals need to focus more on having good communication and relationship building skills with customers, not just on their technical skills.

It should also be noted that all the reasons given by respondents for the lack of loyalty of a customer to a pharmacy fit into the five key points that the literature review had already pointed out as crucial for customer loyalty: in-store experience, technological evolution, digital presence, pharmaceutical services, and advice provided.

In congruence with these results, are those that were found as the most relevant factors to build customer loyalty, since 80% of the respondents considered that the quality of the advice provided and the relationship created between the professional and the client are essential factors in customer loyalty because, as Patrícia Antunes et al. (2015) said, when the advice provided is good and differentiating, loyalty is achieved. However, there is often a lack of customer loyalty to pharmacies because their expectations regarding the quality of the advice provided are not met. These results contribute to understand that pharmacy professionals cannot only be "dispensers" of products, with scientific knowledge, they must also have social interaction skills, understand the user's needs, and know their purchase history, create empathy with them and play an active role in their therapeutic follow-up.

Analysing the results regarding the reasons for the lack of customer loyalty and the results regarding the most relevant reasons for customer loyalty, it can be noticed that the existence of products in stock seems to be a differentiating factor, which when it does not exist is relevant to prevent loyalty and when it exists it makes the customers loyal. It is also considered important, to build customer loyalty, to have a wide portfolio of products. Thus, pharmacies are facing a challenge: to understand which products the customer is looking for and to have enough in stock to satisfy their needs, because making the customer must go back to the pharmacy to buy a product that they didn't have at the moment of their first visit may make the customer never come back. These results show that a good stock management and an adequate product portfolio are crucial for the customer.

Being able to provide the customer with a pleasant experience, with personalized advice, is also one of the determining factors in customer loyalty. Interestingly, the in-store experience was also one of the factors pointed out as preponderant in the lack of customer loyalty to pharmacies. Personalized advice, targeted promotions, loyalty programs, and specific service offerings are factors that increase customer loyalty (Lostakova and Horakova, 2014), as are the in-

store environment, product portfolio, and physical communication (Castaldo et al., 2016), and are therefore key determinants for a pharmacy. These results show that pharmacies must reinvent themselves in their way of communicating in-store with the customer, because the customer no longer sees them only as places to sell PD, but also as a retail store where they want to go to have their own consumer experience.

Pharmaceutical services were the third area considered most relevant in customer loyalty: pharmacies should not only have a broad portfolio of products and services, but also have the chance to offer new services to their customers. Several of the studies reviewed in the literature review point to the importance of pharmaceutical services for customer loyalty. In 2021, an innovative step was taken regarding the reimbursement of pharmaceutical services, when some municipalities (such as Lisbon, Amadora, Oeiras, Lagoa, among others) started a system of reimbursement of rapid tests to COVID-19, and in July 2021, the State launched a decree that also reimburses this service. Thus, for the first time, a remuneration system was contracted between the health systems and the pharmacies, in line with what is already done in other countries, and which has proven to be efficient for the health system (Félix et al., 2017). The study conducted by Martins and Queirós (2015) allowed us to realize that access to pharmaceutical services can increase the competitive advantage of the pharmacy compared to the rest of the market and, therefore, this should continue to be a focus of pharmacies because it will always be a differentiating factor from competition. These data are corroborated with this study, in which we noticed that a small sample (6%) considers that the lack of customer loyalty to pharmacies is due to issues related to pharmaceutical services, but 30% considers that pharmaceutical services can be a key point to build customer loyalty to a pharmacy.

Although digital presence was indicated as the main reason for the lack of customer loyalty to community pharmacies, only 20% of the sample considers this to be a relevant factor in building customer loyalty to a specific pharmacy. These data may suggest that pharmacies do not yet have a sufficient digital presence to differentiate themselves among them. In this sense, the sector needs to rethink its digital presence as a whole, in order to get closer to the rest of the retail competition (websites, shopping platforms, parapharmacies), and not just to differentiate itself from competing community pharmacies.

It should be noted that technological evolution is not considered by managers or employees as a relevant factor in customer loyalty, but it is considered by customers. Retail is changing,

becoming more and more technological, allowing payment to be faster and autonomous, making the customer avoid queues. Technology could also be crucial in improving the in-store experience by allowing a more autonomous and equally informed selection of products to choose, through interactive screens, as suggested by Gong et al. (2021). The results of this research show that pharmacies will need to keep up with this industry evolution to remain attractive to their customers, even if this has not yet been perceived by industry professionals. Increasing in-store technology will allow professionals to spend more time in contact with customers and ensure their needs are better met by freeing up time from tasks that do not add value to the customer (e.g., picking products from the warehouse or processing payment), thereby improving the quality of in-store service and advice provided, the two most important factors in building customer loyalty.

When we look at the key benefits to customer loyalty in a pharmacy, we see that most of the benefits relate to factors related to the quality of pharmacy advice and the in-store experience: increased knowledge of the customer's history, increased knowledge of the customer database, and targeted loyalty programs for loyal customers.

The increase in sales was also one of the benefits mentioned due, among other reasons, to the advertising that the loyal customer will do with his social circle, through word-of-mouth. As mentioned in the literature review, a loyal customer makes frequent purchases, gives positive publicity to the pharmacy, and encourages other customers to frequent the same pharmacy (Nitadpakorn et al., 2017; An and Han, 2020).

One of the inherent benefits of a greater knowledge of the customer database is the creation of an empathetic relationship between the pharmacy professional and the customer, a factor that the literature suggests is crucial for customer satisfaction (Godinho et al., 2018). The other two benefits of this greater knowledge of the database are the possibility of a better dynamization of the portfolio of products and services offered, as well as stocks adjusted to the demand, which, as already mentioned, is a factor highly valued by customers. These results allow us to realize that pharmacies are, therefore, facing a challenge: one of the methods to build customer loyalty is to have an inventory adjusted to customer demand, and one of the benefits in having loyal customers is to get, more easily, an inventory adjusted to customer needs. But how to achieve a good stock adjustment when you don't have many loyal customers? It may be interesting to examine, in future studies, the direct relationship between pharmacy inventory and customer loyalty.

Having loyal customers, the pharmacy can create one-to-one campaigns for them, which

will be successful, since the pharmacy will have its portfolio adjusted to the needs and preferences of loyal customers. In this sense, commercial communication will be more effective because it will be more targeted, which, as mentioned in the literature, influences customer consumption patterns (Batista et al., 2020; Jamett and Schweizer, 2021).

Finally, by having loyal customers, the pharmacy can have a greater knowledge of the user's consumption history and, in this way, succeeds:

6. Perform a better therapeutic follow-up, avoiding medication duplication, adverse reactions and/or drug interactions - some of the main problems encountered in the loss of proximity between a pharmacy and the customer;
7. Providing personalized advice and having a greater knowledge of the user's health history - very relevant factors to maintain customer loyalty, as already analysed;

Considering the results analysis, the answers to the research questions can be summarized in Figure 8.

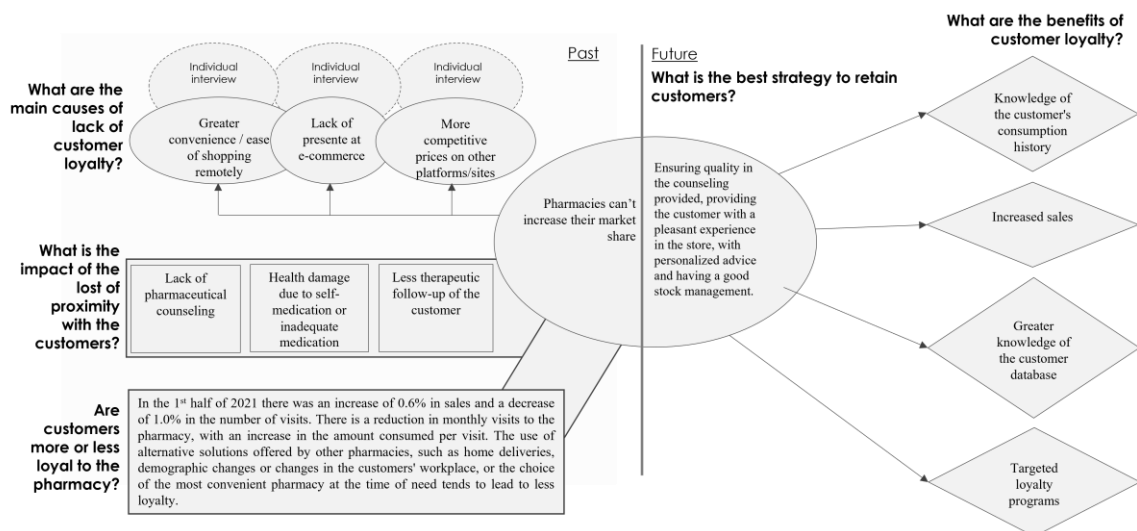


Figure 8 - Diagram with the results of the research to solve the problem

Source: adapted from Pereira et al. (2021)

6. CONCLUSION

This research took a new approach to customer loyalty in pharmacies: trends, difficulties, differentiating factors, problems, and benefits. One of its contributions is that it takes an approach based on the view of the various stakeholders in the community pharmacy sector: customers, employees, and managers. The 50 respondents answered an interview with 10 questions, which

analyzed their opinion regarding customer loyalty to pharmacies. This face-to-face interview methodology has the advantage of providing higher quality and reliable data.

The results suggest that the trend of customer loyalty to pharmacies decreased, not only due to changes caused by telecommuting, which led to frequenting a pharmacy closer to home, or due to changing the place of residence since the beginning of the COVID-19 pandemic, but also due to choosing more convenient pharmacies, with differentiating characteristics: less waiting time at the service, larger product portfolio, greater guarantee of products in stock, extended hours, ease of booking products remotely or home delivery service.

The biggest qualitative impact of the loss of proximity between customers and pharmacies is the lack of pharmaceutical advice, as *e-commerce* or para-pharmacies do not have pharmacy professionals with similar training as those in community pharmacies.

The main causes for some customers' lack of loyalty to pharmacies seem to be related to digital presence and in-store experience: there is a greater convenience and/or ease in buying products in other stores (para-pharmacies, for example) or in *e-commerce*, an area of commerce where pharmacies are not sufficiently present, as well as the in-store experience in community pharmacies is little differentiating and not very personalized, and it is therefore necessary that pharmacies provide innovative experiences to consumers, which meet their needs, with advice provided and an offer of products and services that stands out from the competition. For pharmacy managers and employees, the fact that *e-commerce* platforms/websites practice more competitive prices is also a factor that causes this lack of loyalty to the pharmacy; however, this was not an aspect valued by the interviewed customers.

To build customer loyalty, pharmacies will need to ensure quality advice, provide a pleasant in-store experience where the customer feels they are getting personalized advice, and ensure sufficient stock adjustment so that the customer can always find the product(s) they are looking for.

If customers are loyal, there are qualitative benefits for both parties (pharmacy and customer): greater knowledge of the customer's consumption history, which will allow, for example, more personalized advice and better therapeutic follow-up; greater knowledge of the customer database, which will allow, among other things, better adjustment of stocks and more dynamic supply of products and services; increased sales for the pharmacy due, among other things, to the natural advertising that the customer will do with his social circle, by word of mouth;

and guarantee of loyalty programs more targeted to the customer profile, which will ensure, for example, more effective commercial communication that meets the customer's needs.

This research allowed us to realize that the trend of customer loyalty to a pharmacy is influenced not only by demographic factors, but also by the differentiating attributes that pharmacies can offer, including home delivery service, short waiting times for service, pharmacy accessibility and ease of distance contact. Since the trend in customer consumption is increasingly through the use of distance ordering, as mentioned by Start&Go, it is essential that pharmacies ensure that the customer can do so easily, with the option of fast collection in store or guaranteed home delivery.

In this research, it was also perceived that if there is a loss of proximity between the pharmacy and the customer, because the latter travels less frequently to the pharmacy or chooses to buy in other stores or in *e-commerce*, the main impacts will be on the customer, mainly due to the lack of pharmaceutical counseling. These results validate the literature (Policarpo et al., 2019), since it states that customers no longer think of pharmacy professionals only as drug dispensers, but also as health care providers, with social intervention in the community and in the customers' health.

This research also validated what Chetthamrongchai et al. (2019) stated regarding the *pricing* positioning of a pharmacy: this is not a relevant factor in the lack of customer loyalty.

Factors such as greater convenience when shopping on other platforms/websites/stores or a poorly differentiating and/or personalized in-store experience are crucial for the lack of customer loyalty. On the other hand, the quality of the pharmaceutical advice provided and a pleasant in-store experience, with personalized service, are the most relevant for customer loyalty.

This research had a very relevant practical contribution for pharmacy professionals to focus and improve: the quality of the advice provided is not only a factor valued by customers, but they also want there to be a follow-up of their therapeutic history, personalization in the advice, a less conservative attitude by professionals and less HR rotation, to enhance the creation of proximity between pharmacy professional and customer.

Another very important practical contribution of this research was to show that having a broad product portfolio that meets the user's needs and having a good stock adjustment, which allows the customer to always find the product they are looking for, are differentiating factors for customer loyalty.

This research also validated what the literature refers regarding the growing importance of technological evolution of retail stores, where pharmacies are included (Gong et al., 2021): one of the next steps that pharmacies could (or should) take in this direction are the teleconsultations of pharmaceutical advice that, as 64% of respondents refer, could be an added value for users.

Finally, it allowed validating some of the benefits in customer loyalty, namely the advertising that the customer does with his/her social circle, through word of mouth; the possibility of creating a more valued in-store experience through a more personalized advice (An and Han, 2020); the creation of a closer relationship with the customer, so valued by them (Policarpo et al, 2019), as well as a better knowledge of their health history and better therapeutic follow-up; a more effective commercial communication, which is crucial at this moment (Batista et al., 2020); and an easier promotion of products and services, which are highly important factors for customer satisfaction (Godinho et al., 2018).

The future of the relations between pharmacies and its clients will evolve supported in technology, but keeping a one-to-one relationship, leveraging deep knowledge of client attributes and behaviours to provide a more personalized service with the main goal of increase client loyalty. This personalized service will include, not only, product supply but also one-to-one conceling. The future will be the “old” relationship, supported by the “new” technology.

Additional studies on more specific analyses on customer loyalty to pharmacies will be useful, as systematized in Table 2.

Table 2 - Suggestions for future studies

Topic	Study proposal
Loyalty trend	Analyze if after the end of telework, with the return to face-to-face work, the customer remains loyal to the pharmacy near home or returns to the pharmacy near work
Impact of loss of proximity	Conduct a study similar to this research in a sample of non-pharmacy customers; To understand, in chronic patients, what impact the loss of proximity has on their therapeutic management
Causes of lack of loyalty	Conduct a study like this research in a sample of non-pharmacy customers
Loyalty strategies	To understand the effective impact of the home delivery service in a pharmacy: weight in sales, number of new customers and their

Benefits in loyalty	consumption profile; To analyse whether there are differences in the quality of advice and in-store experience in pharmacies that already have robots for dispensing products compared to pharmacies that do not; Conduct a study of the direct relationship between pharmacy inventory and customer loyalty To know what percentage of PD are dispensed without prescription and what is the effective role that pharmacies may have in this issue and in solving this problem
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Source: author

This research provides some future suggestions for the community pharmacy sector, not only as actors of the health system of the Portuguese population, but also as retail stores that aim to have a portfolio of loyal customers.

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