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GLOBAL

ALLIANCE FOR SAFE
ONLINE PHARMACIES

Online Pharmacy Behavior and Perception Survey Results

The Alliance for Safe Online Pharmacies
(ASOP Global)

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Online Pharmacy Behavior and Perception Survey Results

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Introduction and Executive Summary

In May 2017, the Alliance for Safe Online Pharmacies (ASOP Global) commissioned a national polling firm to evaluate consumer behavior and perception of online pharmacies. The study sought to measure awareness and perceptions of online pharmacy websites, including Canadian online pharmacies, and to gauge the impact factors have on consumers' views of these websites.

The survey results are particularly timely, as millions of Americans face the prospect of changes in their healthcare coverage should Congress repeal or replace the Affordable Care Act, or legalize prescription drug importation from Canada and elsewhere. As policymakers, industry and consumers continue to look to potential paths to lower prescription drug prices, consumers may turn to the internet to access prescription drugs in the meantime.

The survey provided new information on consumer perception and behavior related to purchasing medicines from online pharmacies, including answering the following questions:

- a. Who uses online pharmacies?
- b. What do patients discuss with their healthcare providers?
- c. How consumers find online pharmacies?
- d. Why consumers buy prescription medicine online?
- e. What medicines would consumers buy from online pharmacies?
- f. What makes consumers avoid online pharmacies?
- g. What consumers think about Canadian online pharmacies?
- h. What risks are consumers willing to take to buy medicines online?

The survey revealed that a majority of consumers are unaware of risks associated with online pharmacies amidst one-third of the participants having previously purchasing medications from an online pharmacy for themselves or a family member in the past. **While only 27% of consumers are very familiar with online pharmacies, a majority (55%) of survey respondents said they have or would consider buying medication online.** Although a majority of consumers are likely to use the internet as a potential source for prescription medicines, **less than 5% of consumers are aware of tools available to help them find safe online pharmacies**, such as the National Association of Boards of Pharmacy's .Pharmacy program and LegitScript's URL checker. Further, should the federal government publish a list of safe online pharmacy websites, less than 5% of survey respondents said they would use such resources.

The U.S. Food and Drug Administration (FDA) has reported that 85% of medicines that are sold to Americans by Canadian online pharmacies are not Canadian.ⁱ Since 2010, there have been more than 200 felony counts against networks operating 400,000 sites affiliated with Canadian online pharmacies.ⁱⁱ Furthermore, as we'll discuss later in this report, many of these illegal online pharmacies sell and distribute controlled substances, such as prescription opioids, without a prescription. This would provide access to individuals that misuse, abuse or divert these products outside of the necessary healthcare provider oversight and interaction with prescription drug monitoring programs.ⁱⁱⁱ

There is, however, room for optimism: when presented with facts about the dangers of purchasing medicines from Canadian online pharmacies and other unverified websites, consumers' likelihood to buy online, tolerate

associated risks, and their utilization of Canadian online pharmacies changes dramatically; 59% of consumers who have been presented with the facts oppose prescription drug importation.

See below for more key findings from the survey.

Survey Key Findings:

- **Key Finding #1:** There is a generalized lack of awareness about online pharmacies. Just over a quarter of respondents (27%) are very familiar with online pharmacies, while one-third are not familiar. Only one in twenty respondents were familiar with available Internet resources to identify safe online pharmacies.
- **Key Finding #2:** One-third of respondents have used an online pharmacy to purchase medications for themselves, a family member or someone under their care. Those most likely to use online pharmacies are young, have higher incomes, purchase products online, are willing to take more risk and take more prescription drugs.
- **Key Finding #3:** Two out of five consumers mention price as a reason for using online pharmacies, and another third mention something about their insurance, totaling 76%. Two in five consumers do not use online pharmacies because they like their pharmacy, while a quarter of consumers do not think it is a good idea to purchase medicines from online pharmacies.
- **Key Finding #4:** A majority of respondents (55%) have or would consider purchasing at least one type of prescription or over-the-counter medication online, including classes such as drugs for the management of chronic diseases, cough, cold or allergy medications, as well as specialty medications such as fertility or cancer therapies.
- **Key Finding #5:** Consumers have very little interest in using a government website to find safe online pharmacy websites.
- **Key Finding #6:** 11% of consumers are likely to use a Canadian online pharmacy.
- **Key Finding #7:** Initially, a majority of respondents favor legalizing the use of Canadian online pharmacies. After respondents are informed that it can lead to worsening the opioid epidemic, a majority are opposed to legalizing the use of Canadian online pharmacies.
- **Key Finding #8:** Half of respondents (51%) are only willing to accept lower levels of risk when purchasing prescription drugs online or from a Canadian online pharmacy, indicating it is important they understand what the risks are. Another 35% would accept moderate or high risk, which indicates the importance of protecting consumers from certain risks.
- **Key Finding #9:** Initially only 13% of survey participants responded that they believe Canadian online pharmacies are very risky, but after learning more about the risk, 53% responded that they believe they are very risky.

Survey Rationale, Methodology and Demographics

ASOP Global commissioned this survey to obtain a better understanding of motivations behind consumer decisions on purchasing prescription medicines online. The survey provides new insights into U.S. consumer behavior and perceptions of these websites.

SURVEY METHODOLOGY AND DEMOGRAPHICS

Over a period of five days in May 2017, ASOP Global conducted a poll of 500 voters in Indiana through polling firm Baseline & Associates, Inc. Of the 500 interviews, 33% were conducted via an online panel, 37% through landline phone and 30% on a mobile phone. The age distribution, race/ethnicity and partisanship of the respondents is representative of voters in Indiana. A total of 500 individuals were included in the survey (48% male / 52% female) and the age of survey participants reflects national averages. Approximately 66% of all survey respondents were active social media users and 76% of survey participants or a member of their household were taking a prescription medicine.

Since Indiana is a Republican leaning state, the survey was consistent with state demographics in that responders included more Republicans than Democrats (48.8% to 32.2%). This differs from the national average (42.4% to 45.4%). However, when weighing responses against political affiliation, the results were similar. Responses from survey participants that identified as Republicans, Independents, or Democrats did not greatly differ to the point that they were not considered statistically significant.

BACKGROUND ON THE ONLINE PHARMACY MARKET

There are approximately 35,000 active online pharmacies operating worldwide^{iv} and 100% of Internet searches for 'buy medicine online' lead consumers to dangerous pharmacy websites, increasing their chances of receiving counterfeit medications from unknown sources. In addition, 96% of online pharmacies do not comply with U.S. federal and state laws and pharmacy standards.^v More than 12% of illegal online pharmacies (roughly 3,400 sites) sell controlled substances like opioids,^{vi} and 600 illegal online pharmacy websites are launched each month.^{vii} 100% of search results for "buy medicine online" lead consumers to illegal and unsafe websites.^{viii}

AN EDUCATED CONSUMER IS A SAFE CONSUMER

Consumer education related to online pharmacies is important, since, as the survey results point out, a majority of consumers are not aware of the risks posed by illegal online drug sellers. **The survey results reveal, however, that educating consumers will impact consumers' behaviors.**

An educated consumer can also help mitigate the opioid epidemic, since consumers currently can purchase opioids from illegal Canadian online pharmacies. When searching for an online pharmacy, one in five previous online pharmacy users said they simply typed the name of their medication into a search engine and chose a website at random, rather than ordering from a pharmacy site associated with their local pharmacy, such as CVS.com, utilizing an approved site offered by their insurance plan, or searching the list of pre-approved sites made available through the National Association of Boards of Pharmacy.

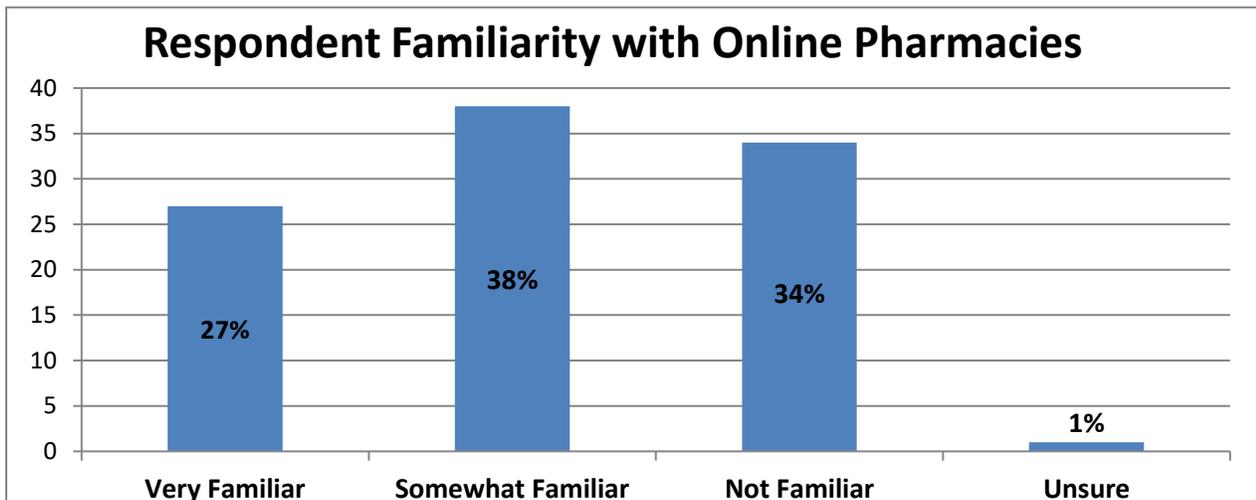
Further, **Purdue University's research^{ix} found that even licensed pharmacists typically cannot differentiate legitimate from illegal online pharmacies just by looking at a website.** The average consumer is all the more susceptible to illegal pharmacy websites that offer 'too good to be true' prices, claims of selling 'genuine Canadian medicines', and other tactics that put patients at risk.

SURVEY RESULTS

Facts and Findings

WHO USES ONLINE PHARMACIES?

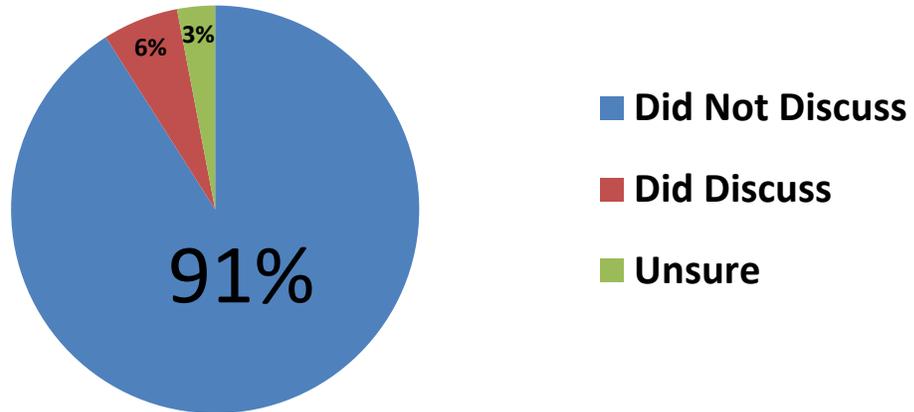
There is very little awareness about online pharmacies and only about 1 in 4 consumers responded that they were very familiar with online pharmacies. Those most likely to consider purchasing medications online are those who are younger, have higher incomes (above \$80,000 annual income per household), and purchase other items online. The clear majority (74%) of consumers who have purchased prescription medicines from an online pharmacy in the past would do it again.



WHAT DO PATIENTS DISCUSS WITH THEIR HEALTHCARE PROVIDERS?

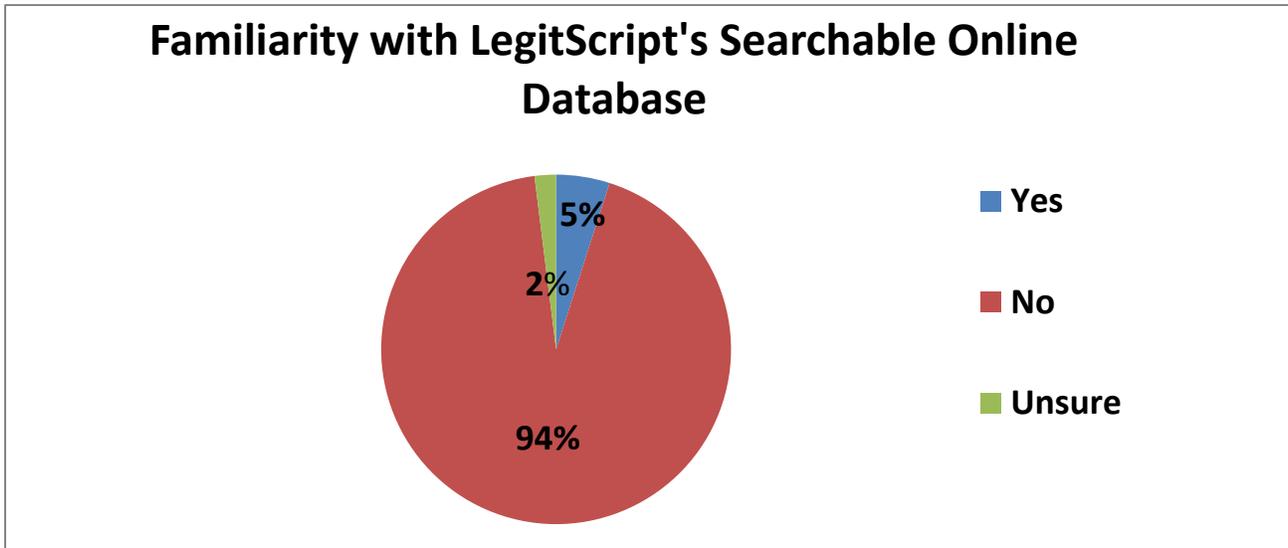
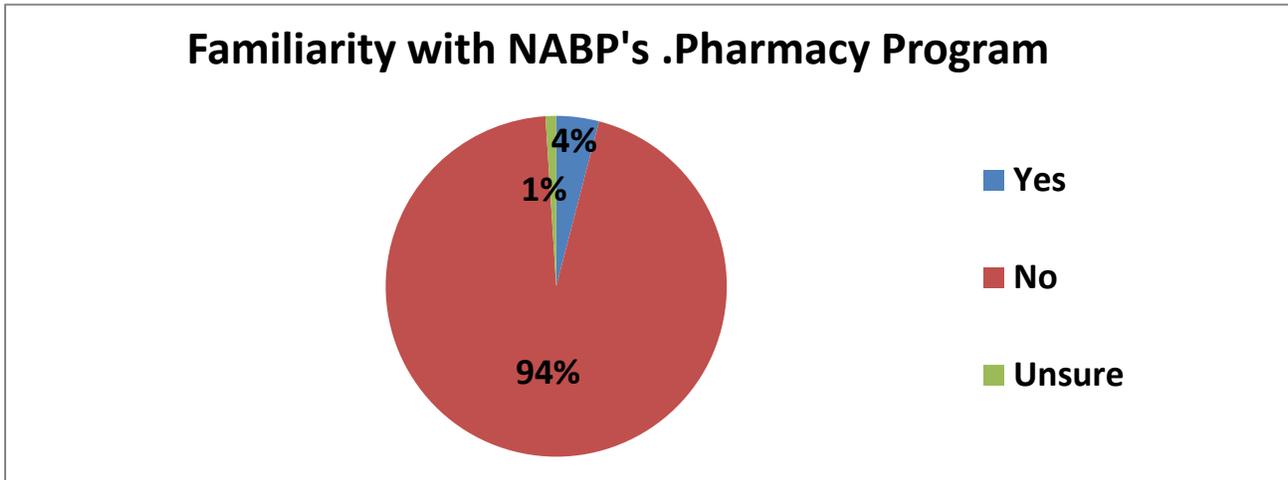
91% of consumers have not discussed online pharmacies with their healthcare provider. If healthcare providers were more aware of the risks associated with online medicine purchases and discussed the risks with their patients, consumers would be less likely to purchase online medicines.

Consumer Discussions on Online Pharmacies with a Healthcare Provider



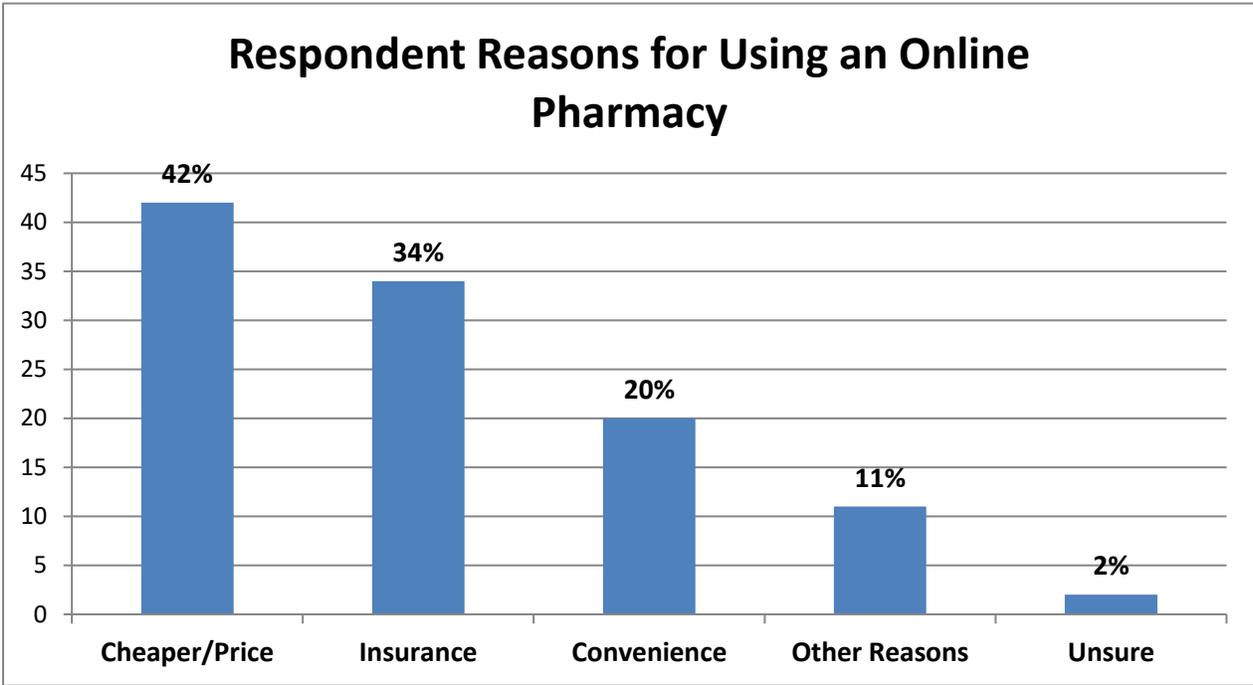
HOW DO CONSUMERS FIND ONLINE PHARMACIES?

One-in-five online pharmacy users find online pharmacies through a web search alone. Lists of safe sites don't work. Less than 5% of consumers report they would use a government list of safe online pharmacies. Less than 5% of consumers are aware of tools available to help them find safe online pharmacies, such as the National Association of Boards of Pharmacy's .Pharmacy program and LegitScript's URL checker. Just over half (51%) of the aforementioned online pharmacy consumers used a site that was not affiliated with their local brick-and-mortar pharmacy. Of consumers who have used an online pharmacy: 9% bought from a Canadian online pharmacy, 5% bought from another foreign online pharmacy, 3% reported not knowing the location of the online pharmacy.



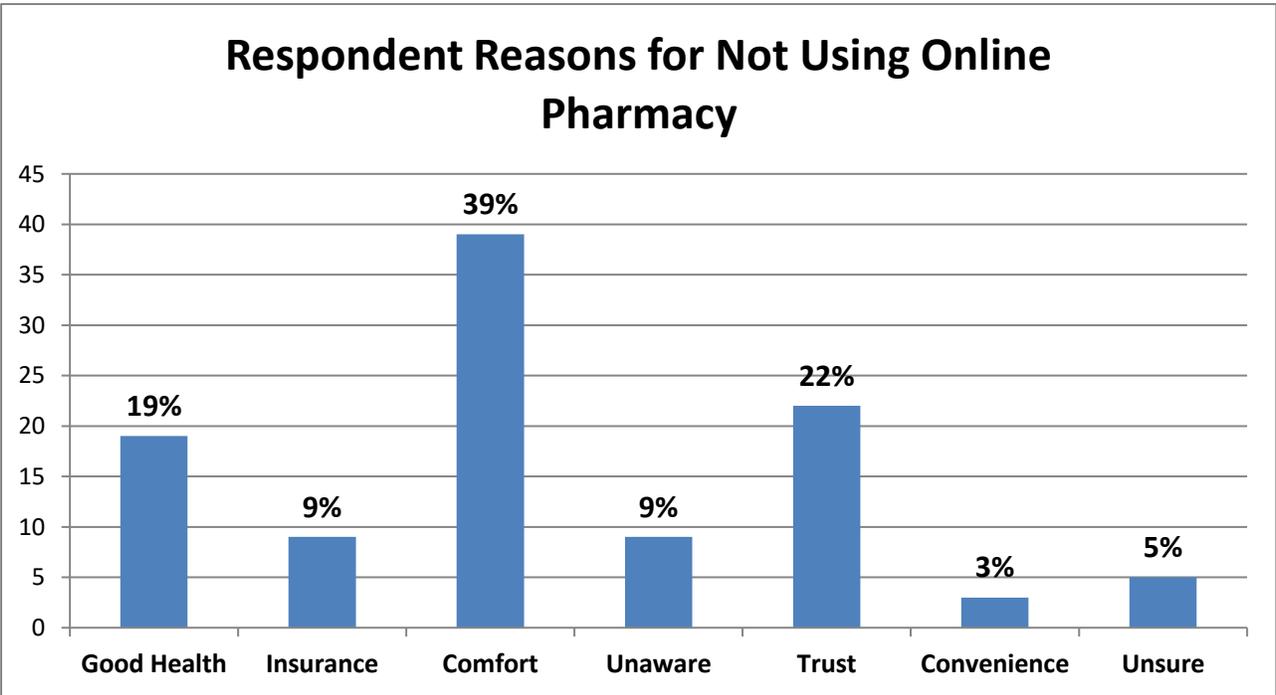
WHY DO CONSUMERS BUY PRESCRIPTION MEDICINES ONLINE?

For people who reported to have previously used an online pharmacy, 42% of consumers responded that they did so to purchase medicines for cheaper prices. 34% cited discounts offered through their insurance plans (e.g. to get a 90-day supply), suggesting that these respondents may have believed their pharmacy benefit managers' website was an online pharmacy. One-in-five respondents utilize online pharmacies for speed and/or convenience of the process. When told that medicines are cheaper with Canadian online pharmacies, consumers increased their likelihood to use Canadian online pharmacies by 9 points.



WHAT MAKES CONSUMERS AVOID ONLINE PHARMACIES?

Survey respondents that indicated they avoid using online pharmacies cited a variety of reasons, including comfort, good health, convenience and trust. See the below chart for additional details. In addition, consumers have privacy concerns with purchasing medicines online. 57% of consumers believe their privacy and/or identity theft is at risk when using online pharmacies. 39% of people who have not purchased prescription drugs online (non-purchasers) note their comfort with their current process of dealing with a brick-and-mortar pharmacy. 22% of non-purchasers report they are not comfortable and/or do not trust online pharmacies.



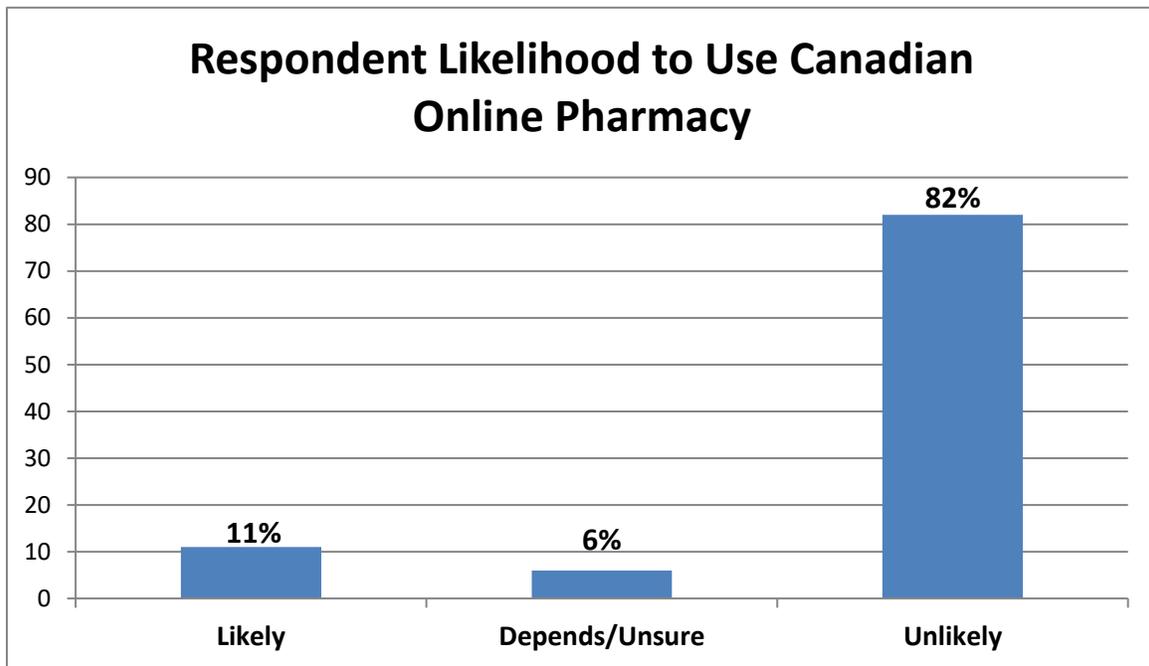
WHAT MEDICINES WOULD CONSUMERS BUY FROM ONLINE PHARMACIES?

The survey results provide important information concerning the types of medications that consumers have or would purchase from an online pharmacy website. **More than half of the respondents (55%) have or would consider buying at least one type of medication online, including:**

- **42%** – for chronic on-going conditions such as blood pressure and cholesterol;
- **34%** – for over-the-counter medicines such as cough, cold, allergy or pain reducers;
- **23%** – for medicines for acute, short-term issues such as infections and insomnia; and
- **21%** – for specialty medications, such as for cancer treatment and hormone replacement therapy.

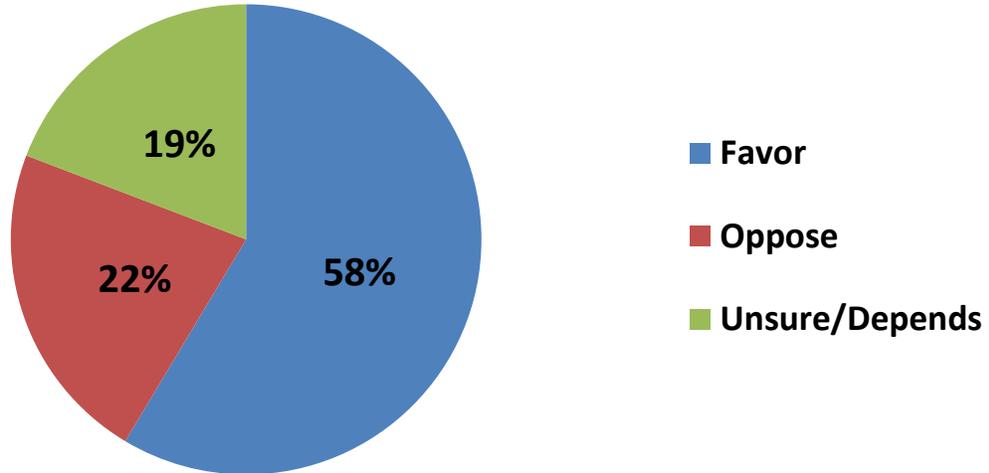
WHAT DO CONSUMERS THINK ABOUT CANADIAN ONLINE PHARMACIES?

These survey findings demonstrate that consumers are not aware of the risks associated with purchasing medicines from Canadian Online pharmacies. 11% of consumers are likely to use a Canadian online pharmacy. 20% of consumers are likely to use a Canadian online pharmacy when told the medicines are cheaper. 47% of consumers do not perceive Canadian online pharmacies as risky and 46% perceive Canadian online pharmacies as offering cheaper medicines. 37% of consumers who would consider using a Canadian online pharmacy are not willing to accept much risk with an online pharmacy. Consumers who view Canadian online pharmacies as not risky are twice as likely to use them as those who view them as risky (15% to 8%, respectively).



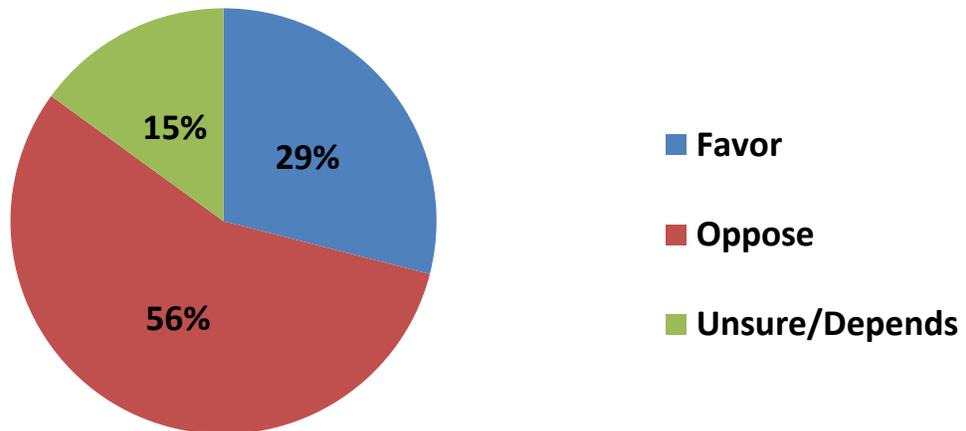
While it is estimated that millions of Americans purchase prescription medication from Canadian online pharmacies, it is currently illegal to do so. **When consumers were asked if they favor or oppose legislation that would allow Americans to legally purchase prescription medication from Canadian online pharmacies 58% were in favor; 19% responded it depends and 22% responded they oppose.**

Respondent Support of Drug Importation Before Being Informed of the Impact on Opioid Epidemic



When presented with the fact that many foreign and Canadian online pharmacies do not require prescriptions for controlled substances and the potential to exacerbate the current opioid epidemic, 56% oppose allowing Americans to legally purchase prescription medications from Canadian online pharmacies, 29% favor and 15% said it depends.

Respondent Support of Drug Importation After Being Informed of Opioid Epidemic Impact (in %)

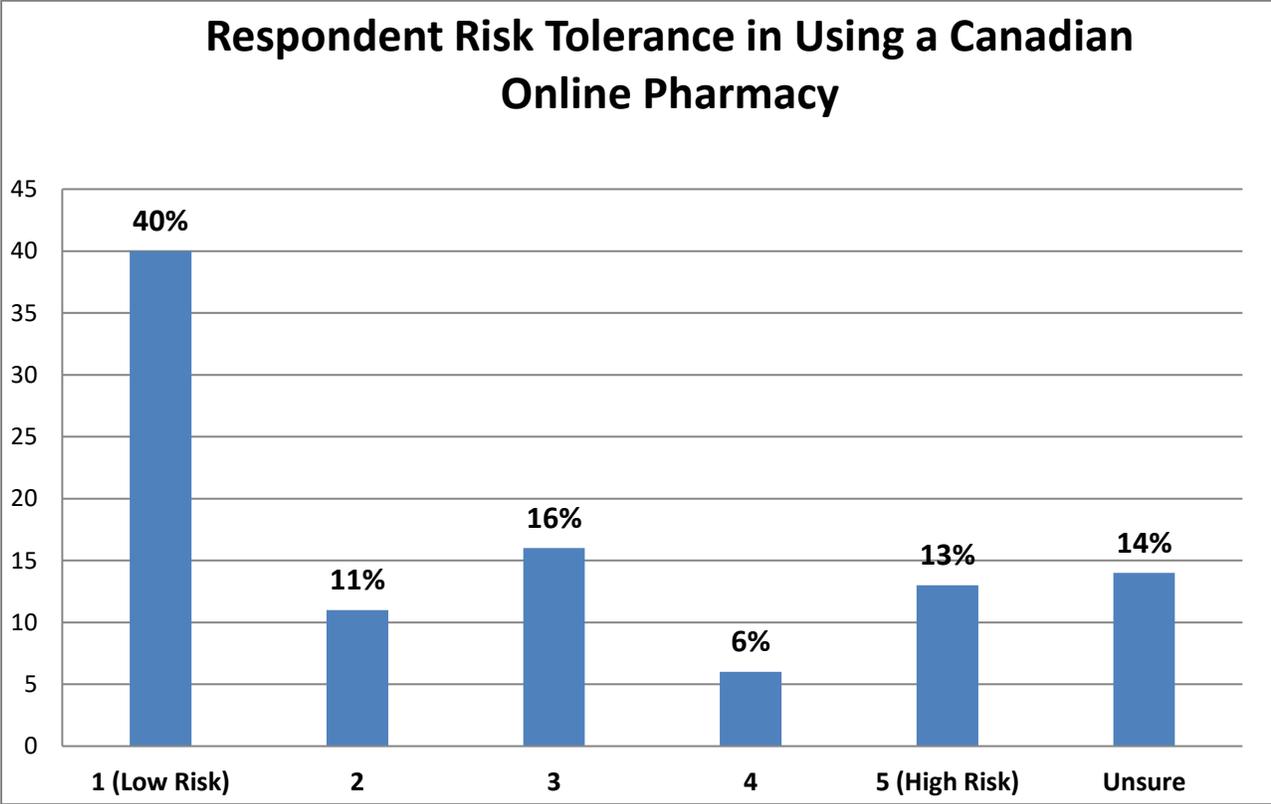


WHAT RISKS ARE CONSUMERS WILLING TO TAKE TO BUY MEDICINES ONLINE?

Initially only 13% of respondents thought Canadian online pharmacies were very risky, but after hearing the facts cited below, 53% said they are very risky. **Facts changed consumers' risk perception about Canadian online pharmacies by 40 points.**

Nearly one-in-five consumers who would consider purchasing medicines online would be willing to accept a moderate-to-high amount of risk when purchasing from a Canadian online pharmacy. People with lower incomes are willing to take more risk. Consumers willing to accept moderate-to-high amounts of risk to buy medicines online: 41% of people with income below \$40,000, 38% of people with income between \$40,000 - \$79,000, 29% of people with income between \$80,000 - \$124,999, 24% of people with income above \$125,000.

When asked on a scale of one to five, with one being the lowest risk and five being the highest risk, how much risk consumers are willing to accept in exchange for the convenience and savings with using prescription medications purchased from Canadian online pharmacy, respondents produced the following results:



Compelling Facts about Canadian Online Pharmacies

When educated, a majority of Americans oppose drug importation from Canada and believe that Canadian online pharmacies are “very risky.” Here are the facts that impact consumers’ perception:

1. Many foreign and Canadian online pharmacies do not require prescriptions for medication, making it easier for addicts to evade law enforcement and get drugs, and potentially exacerbating our country’s opioid epidemic.^x
2. Since 2010 there have been more than 200 felony counts against networks operating 400,000 websites affiliated with Canadian online pharmacies.^{xi}
3. While the Canadian government requires Canadian online pharmacies to sell Canadian approved drugs to their own citizen, they cannot ensure Americans will receive Canadian medicines. In fact, according to the US FDA, 85% of medicines that are sold to Americans by Canadian online pharmacies are NOT Canadian.^{xii}
4. Currently, as a U.S. consumer, there are legal remedies you can choose to pursue if you are harmed by the purchase of medicines from a U.S. online pharmacy. However, U.S. courts have no ability to enforce against Canadian online pharmacies.
5. There are thousands of illegal foreign websites – many of them passing themselves off as Canadian online pharmacies – and it is impossible to tell the real ones from the fake ones. Americans who buy from Canadian online pharmacies cannot be sure what they are getting.
6. There is a 50% chance of receiving a counterfeit medicine from a foreign online pharmacy, for which many of these drugs can worsen symptoms if not cause irreparable harm or even death.^{xiii}

In addition, there are other facts about prescription drug importation that were used in the survey to help further educate consumers on the potential risks associated with online pharmacy websites. These *inconvenient* facts that some consumers and importation advocates don’t want to hear include:

1. PharmacyChecker, a known site for vetting Canadian online pharmacies, had an executive indicted for his involvement in an international drug smuggling conspiracy involved with shipping counterfeit and other illegal drugs to U.S. consumers.^{xiv}
2. Buying prescription medicines from illegal online pharmacies increases your risk of credit card fraud or identity theft.^{xv}
3. Foreign online pharmacies have been found to sell products tainted with lead, paint, and other materials that could be potentially deadly to a consumer.^{xvi}
4. The US FDA and Department of Health and Human Services has the ability to certify the importation of drugs from Canada as safe but has never chosen to do so.^{xvii}

Conclusions

In summary, this survey shows:

- 1. More consumer education is needed.** Lists of safe sites do not work, and less than 5% of consumers report that they would use a government list of safe online pharmacies. Less than 5% of consumers are aware of tools available to help them find safe online pharmacies, such as the National Association of Boards of Pharmacy's .Pharmacy program and LegitScript's URL checker.
- 2. More healthcare provider education is needed.** 91% of patients never talk to their doctor about where they buy medicine, and 89% of people who have bought medicine online never discussed the risks with their healthcare provider.
- 3. A majority of consumers oppose drug importation.** While a majority of consumers were initially in favor of legislation that allow the legal purchase of prescription medications from Canadian online pharmacies, over one third of consumers now opposed legislation, joining the one-in-five that stayed opposed, when made aware of the risks for this legislation to exacerbate the opioid epidemic. 56% of consumers opposed legislation when presented with this fact.
- 4. Canadian online pharmacies are perceived as “very risky” by consumers who are educated on the issue.** Initially, only 13% of consumers felt that Canadian online pharmacies were “very risky”, but after learning more about it, 53% felt they were very risky. Only 12% of consumers now felt that there was little to no risk associated with Canadian online pharmacies in comparison to 47% of consumers prior to being informed.

i [Hearing on the Nomination of Dr. Robert Califf to Serve as FDA Commissioner – Questions for the Record](#). Senate Committee on Health, Education, Labor and Pensions. November 2015.

ii ASOP Global and LegitScript, see [Infographic](#), 2017

iii [Internet Drug Outlet Identification Program](#), National Association of Boards of Pharmacy, March 2017

iv [Internet Drug Outlet Identification Program](#), National Association of Boards of Pharmacy, August 2016

v [Internet Drug Outlet Identification Program](#), National Association of Boards of Pharmacy, March 2017

vi [Internet Drug Outlet Identification Program](#), National Association of Boards of Pharmacy, March 2017

vii [The Internet Pharmacy Market in 2016](#), LegitScript and the Center for Safe Internet Pharmacies, January 2016

viii LegitScript, 2017

ix http://buysaferx.pharmacy/wp-content/uploads/2017/05/CMSA_whitepaper_rphonlinelegitimacy.pdf

x *Id.*

xi *Id.*

xii *Id.*

xiii [Substandard, Spurious, Falsely Labelled, Falsified and Counterfeit Medical Products](#), World Health Organization

xiv U.S. vs. CanadaDrugs.com LTD Partnership, et al. [Indictment](#), June 2015.

xv [What You Need to Know Before You Buy Prescription Medications Online](#), Pinnacle Care – Disease Management, 2015

xvi [Poisons Found in Counterfeit Medicines](#), Partnership for Safe Medicines, 2012

xvii [Ex-FDA Commissioner Letter on Importation](#), March 2017