

Online Pharmacy Consumer Behavior and Perception Survey:

Outline of Key Findings and Results

In May 2017, ASOP Global commissioned a national polling firm to evaluate consumer behavior and perception of online pharmacies.ⁱ The following is a summary of key findings.

TAKEAWAY: After learning the facts, 59% of consumers oppose prescription drug importation.

About the Online Pharmacy Market

- There are approximately 35,000 active online pharmacies operating worldwide.ⁱⁱ
- 96% of online pharmacies do not comply with U.S. federal and state laws and pharmacy standards.ⁱⁱⁱ
- More than 12% of online pharmacies (roughly 3,400 sites) sell controlled substances like opioids.^{iv}
- 600 illegal online pharmacy websites are launched each month.^v

Who Uses Online Pharmacies?

- There is very little awareness about online pharmacies; only 27% of consumers 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.
- 72% of daily social media users would consider purchasing medications online compared to the 75% of non-social media users who would not consider using an online pharmacy.
- 74% of consumers who have purchased prescription medicines from an online pharmacy in the past would do it again.

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 were likely to 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 previous 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

An Educated Consumer Is a Safe Consumer

- 88% of people who have purchased prescription drugs online (purchasers) did not discuss it with their healthcare provider.
- 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.
- Less than 5% of consumers would use a government sponsored list of sites when looking for prescription medicines online.

What Makes Consumers Avoid Online Pharmacies?

- 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.

Key Consumer Behavior and Perception Survey Findings

Consumer Behavior

- While only 27% of consumers are very familiar with online pharmacies, a majority (55%) has or would consider buying medication online.
- 33% of survey participants have purchased prescription medications for themselves or a family member from an online pharmacy.
- 55% of consumers have or would consider buying at least one type of medication online.
- The highest percentage of consumers who have already used an online pharmacy are Americans 55+ who have higher incomes, frequently shop online, and take multiple medications.
- Those most likely to consider purchasing medications online are those who are younger, have higher incomes, and purchase other items online.
- 37% of consumers who would consider using Canadian online pharmacies are not willing to accept much risk with an online pharmacy (aka would use Canadian online pharmacies if deemed safe).
- 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.

Consumer Perceptions on Canadian Online Pharmacies

- 11% of consumers are likely to use a Canadian online pharmacy.
- 15% of consumers would consider using a Canadian online pharmacy and are willing to accept moderate-to-high risk to do so.
- 53% of consumers perceive Canadian online pharmacies as risky.
- 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).

What Do Consumers Think About 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.
- 46% of consumers 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).

Facts that Impact Consumers' Views

1. Many foreign and Canadian online pharmacies do not require prescriptions for medication^{vii}, making it easier for addicts to evade law enforcement and get drugs, worsening our country's opioid epidemic.^{viii}
2. Since 2010 there have been more than 200 felony counts against networks operating 400,000 websites affiliated with Canadian online pharmacies.^{ix}
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 USFDA, 85% of medicines that are sold to Americans by Canadian online pharmacies are NOT Canadian.^x
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.

ⁱ **Methodology:** 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 mobile phone. The age distribution, race/ethnicity and partisanship of the respondents was representative of voters in Indiana. Total of 500 individuals included in the survey (48% male // 52% female). Age of survey participants reflects national averages.

Why It Is Nationally Representative. The gender split in the Indiana survey was 48% male / 52% female. This is similar to the national spread. The distribution of ages in the survey is close to that of national voters. Since Indiana is a Republican-leaning state the survey has a higher Republican to Democrat ratio than the country. However, there is no statistical difference in responses when partisanship is re-weighted to mirror national proportions. This is because there is little statistical difference in the way Republicans, Independents and Democrat answered many of the questions in the survey.

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

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, March 2017

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

^{vi} LegitScript, 2017

^{vii} [Buying Medicine Online – What Are the Risks](#), National Association of Boards of Pharmacy.

^{viii} [Report on the Potential Impact of Drug Importation Proposals on U.S. Law Enforcement](#), Freeh Group International Solutions LLC, June 2017.

^{ix} ASOP Global and LegitScript, see [Infographic](#), 2017

^x [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.