

# Consumer Perceptions and Behaviors towards Online Pharmacies

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Dr. Anne Snowdon, Academic Chair,  
World Health Innovation Network

# TWO METHODOLOGIES

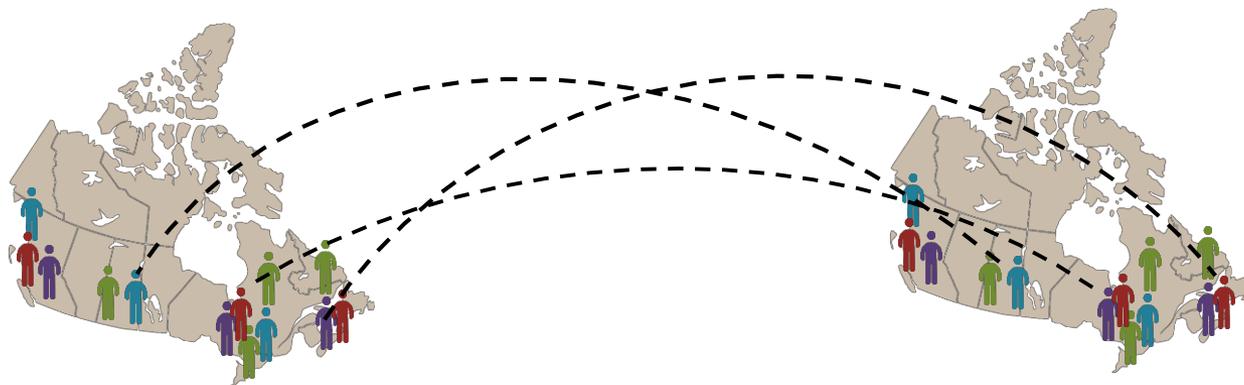
- Two surveys (telephone and online)
- Telephone survey: 1,287 randomly selected adult Canadians ( $\geq 18$  yrs., April 12<sup>th</sup> – May 2<sup>nd</sup>, 2018). Margin of error = 3.1% at 95<sup>th</sup> confidence interval
- Online survey: 1,635 adult Canadians to examine more in-depth perceptions and behaviors (April 19<sup>th</sup> – 27<sup>th</sup>, 2018).
- Results were weighted to  $n=1,000$  by age, gender and region based on latest census data



# Methodologies



The telephone survey serves as a *reference study* and established the true incidence rates within the Canadian population. The online data are weighted by the telephone results to better reflect a random-probability sample representative of the Canadian population.



## Telephone Sample

The results from this random-probability sample accurately reflect the incidence rates among the Canadian population (within a statistical margin of error).

The telephone results for ***prescription medication use, awareness of online pharmacies, and purchase experience*** are used to create a weight by which the online data are weighted.

## Weighted Online Sample

The online sample is weighted by ***prescription medication use, awareness of online pharmacies, and purchase experience*** to reflect the results of the random telephone sample and to better represent these metrics for the Canadian population.

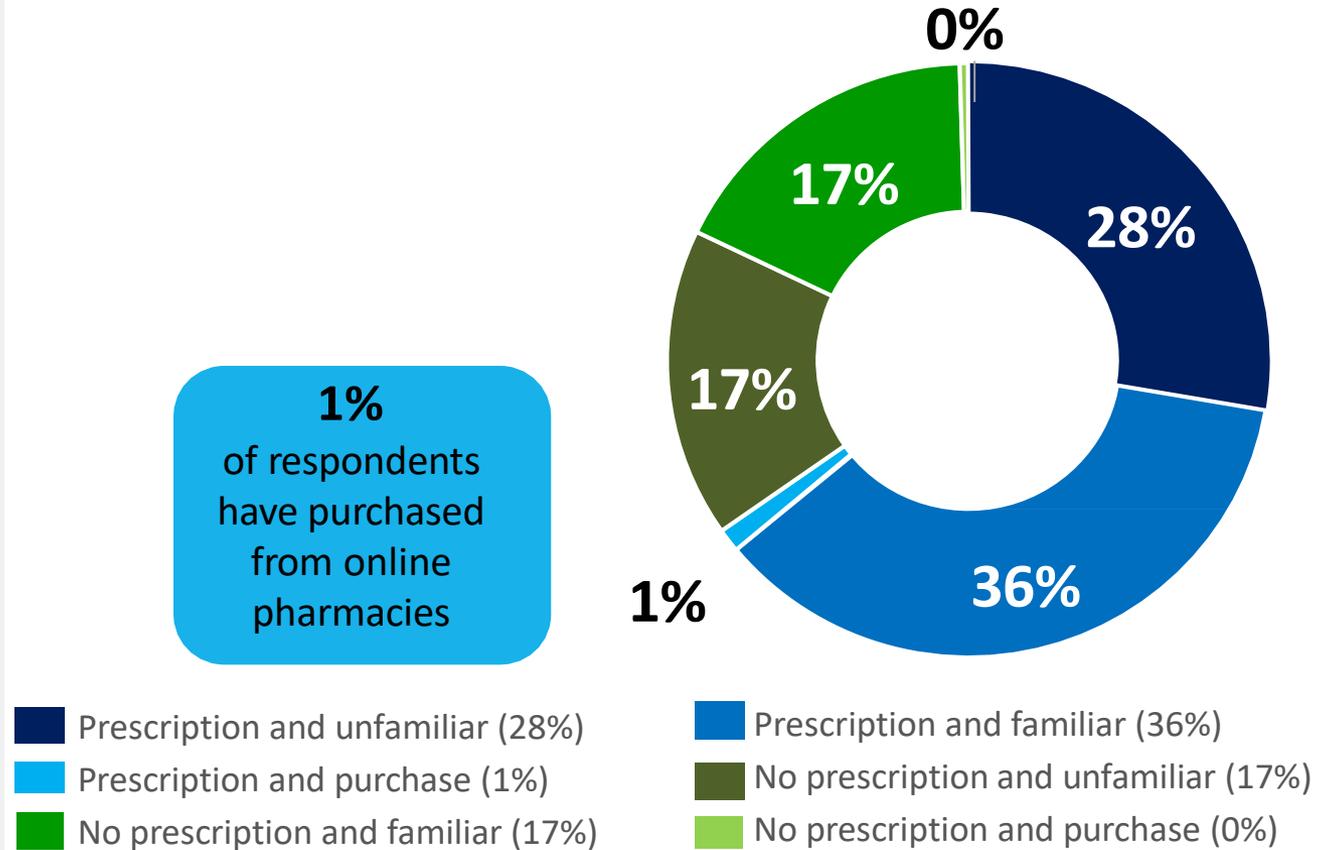
# Weighting Segmentation for Online Survey



The online data was weighted to reflect the incidence rates established in the telephone survey for **prescription medication use, awareness of online pharmacies, and purchase experience.**

These variables were combined to create a **usage and familiarity segmentation** and to align the online data with the telephone data.

## Usage and familiarity segmentation of Online Data (based on telephone data)



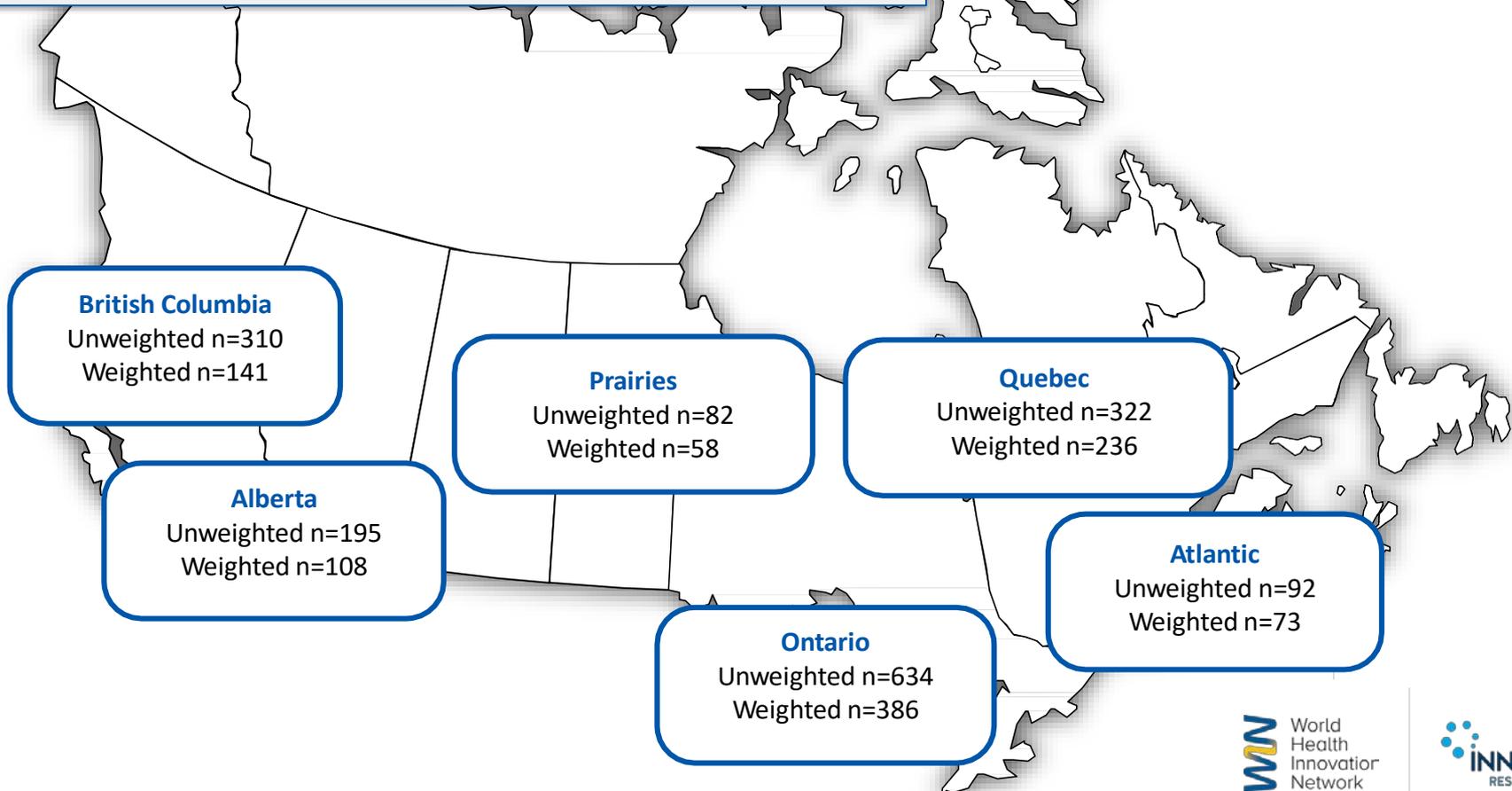


# Where did respondents come from?

Regional groupings include:

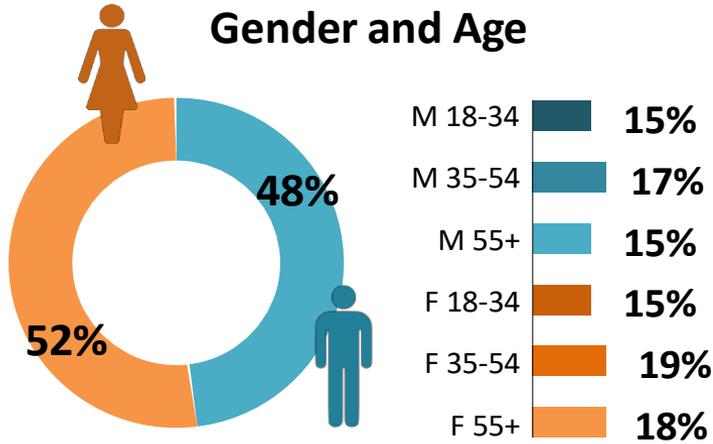
- British Columbia (Yukon)
- Alberta (Northwest Territories)
- Prairie Region (Manitoba, Saskatchewan and Nunavut)
- Ontario
- Quebec
- Atlantic (PEI, New Brunswick, Nova Scotia and Newfoundland & Labrador)

**National Sample  
(Online) n=1,000**  
Unweighted n=1,635

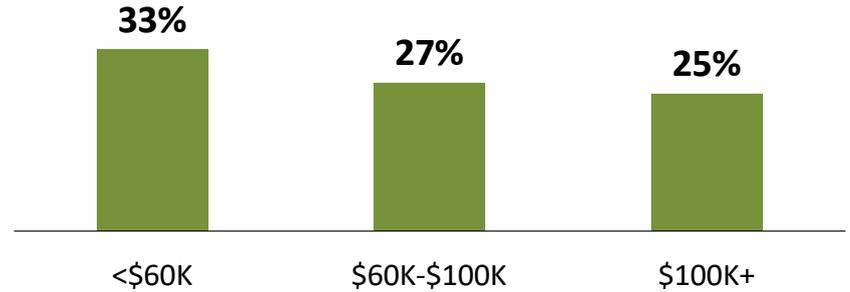




# Demographics: Respondent Profile

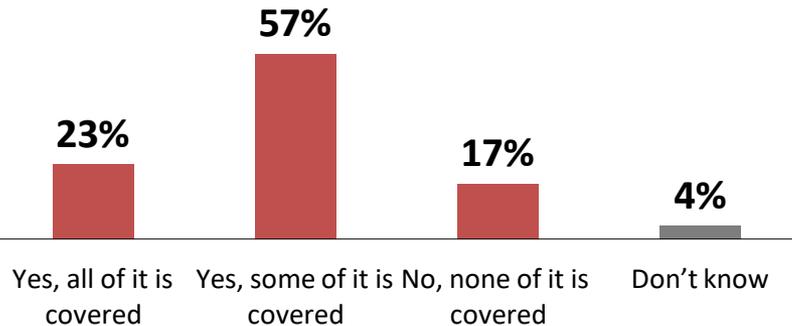


### Household Income

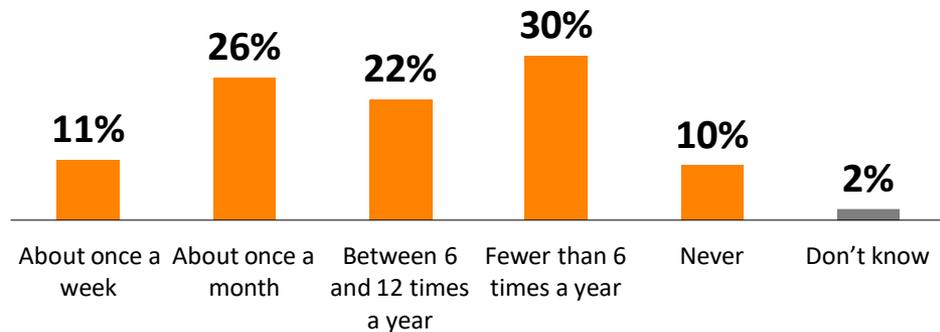


Note: 15% prefer not to say

### Prescription Coverage



### Online Shopping

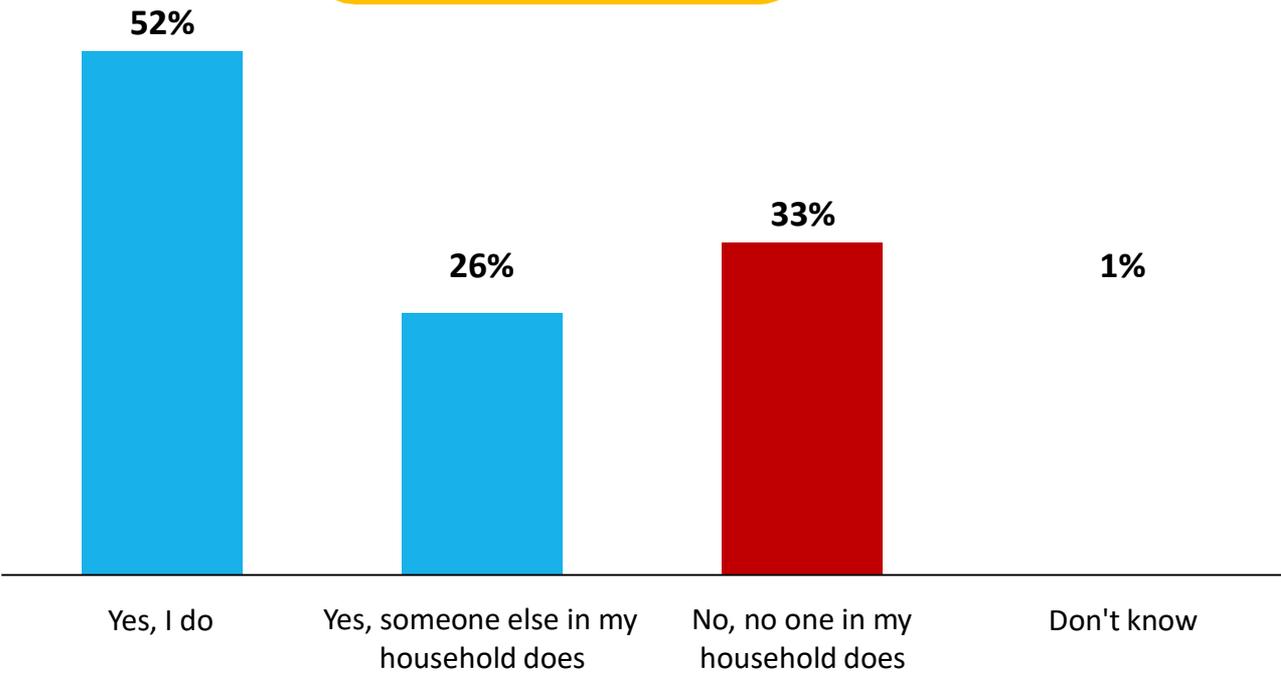


# Prescription Medication: Over half (52%) of respondents take prescription medication



**Q** Do you, or does someone in your household, currently take any prescription medication? *Please select all that apply.*  
 [multiple mention: percentages do not add up to 100; asked of all respondents, n=1,000]

66% of respondents live in households in which at least one member currently takes prescription drugs

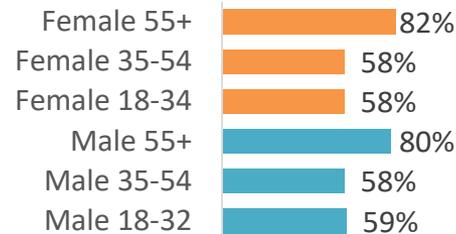


Note: 1% prefer not to say

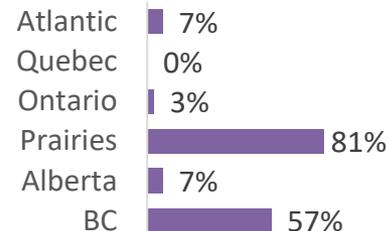
## Segmentation

Those who live in households with prescription medication

### Age/Gender



### Region



### Income



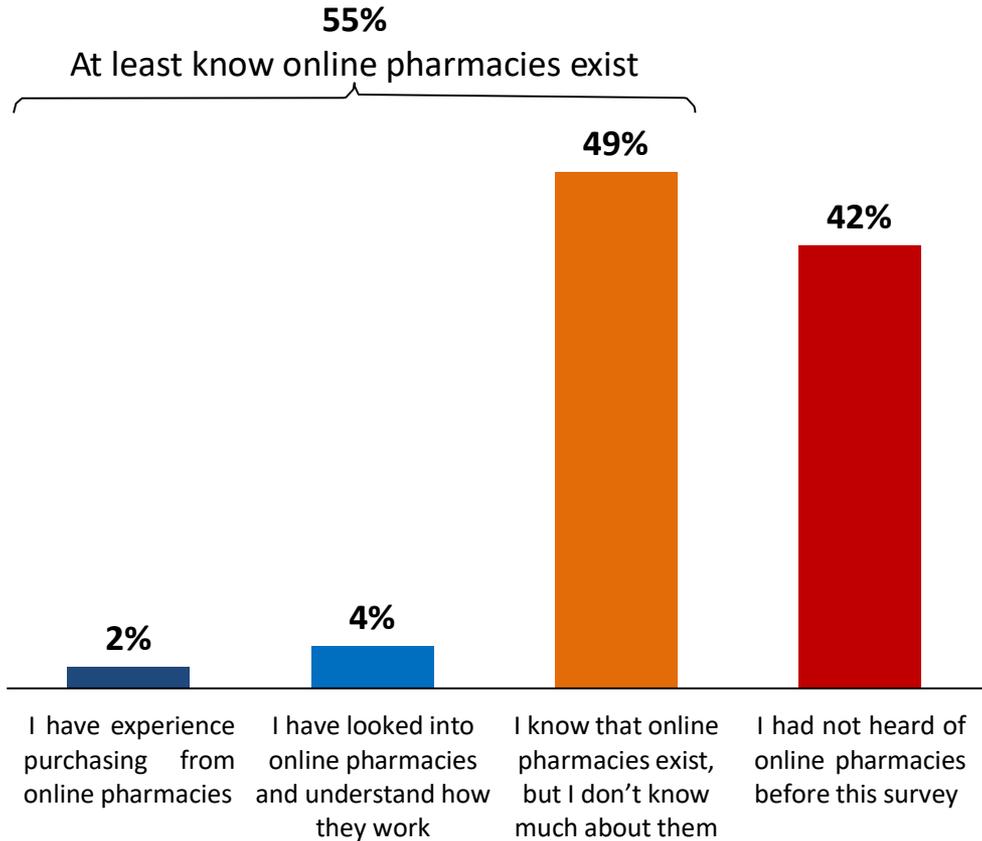
### Extended Benefits



# Awareness of Online Pharmacies: Just over half (55%) of respondents know that online pharmacies exist



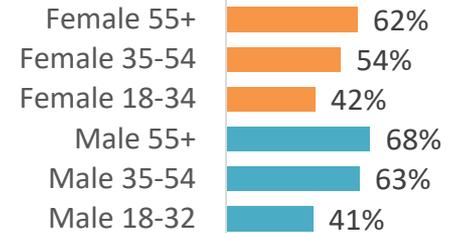
**Q** The following questions are about online pharmacies. An online pharmacy is defined as a pharmacy that operates over the internet and sends the orders to customers through the mail or shipping companies. Please note that this does not include online pharmacy services, such as refilling orders.  
 To what extent were you aware of online pharmacies before this survey?  
 [asked of all respondents, n=1,000]



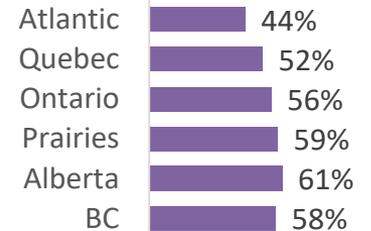
## Segmentation

Those who say *they at least know online pharmacies exist*

### Age/Gender



### Region



### Income



### Extended Benefits

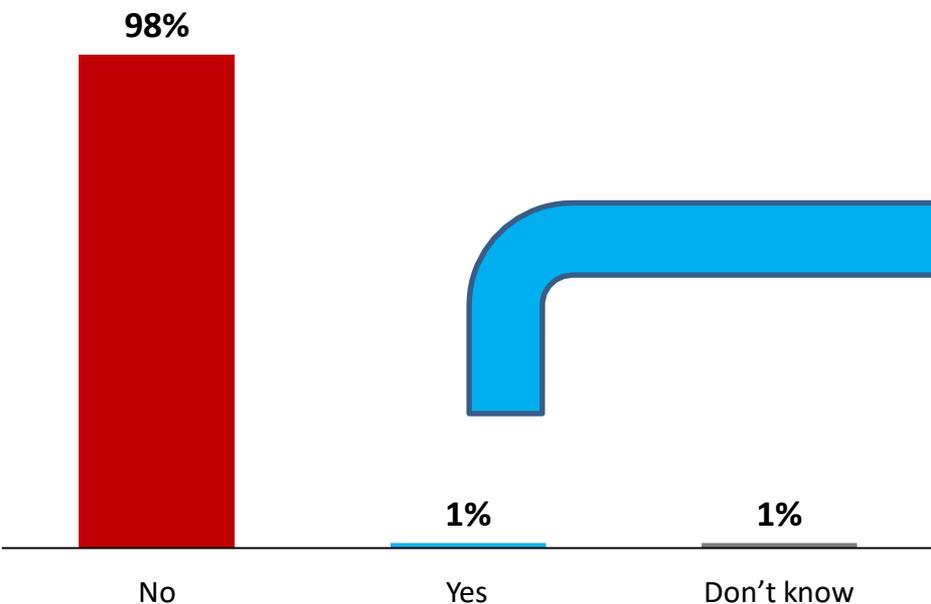


# Purchase History: Only 1% of respondents have bought prescription medication online



**Q** Have you ever purchased prescription medication, either for yourself or a family member, from an online pharmacy?

heard of online pharmacies before, n=1,000]



**Note: Very small n-size. Interpret with caution.**

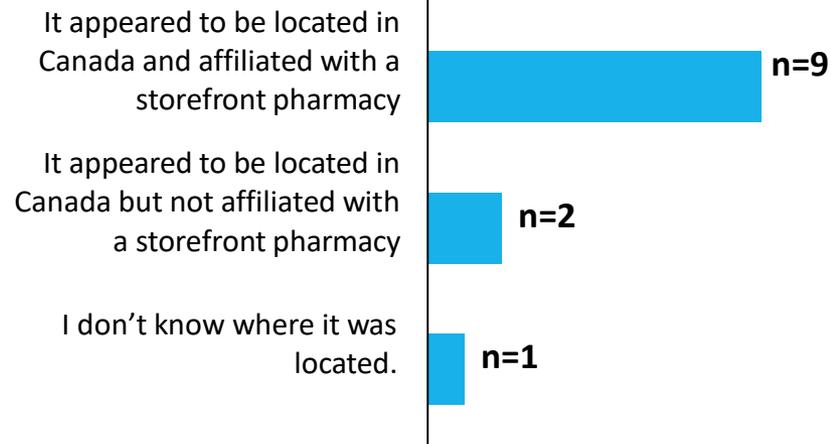
**Q** Thinking of all the prescription medication you purchase for yourself or your family, how much of it do you purchase online?

medication from an online pharmacy, n=13]



**Q** Thinking of the last time you ordered from an online pharmacy, which of the following best describes that pharmacy?

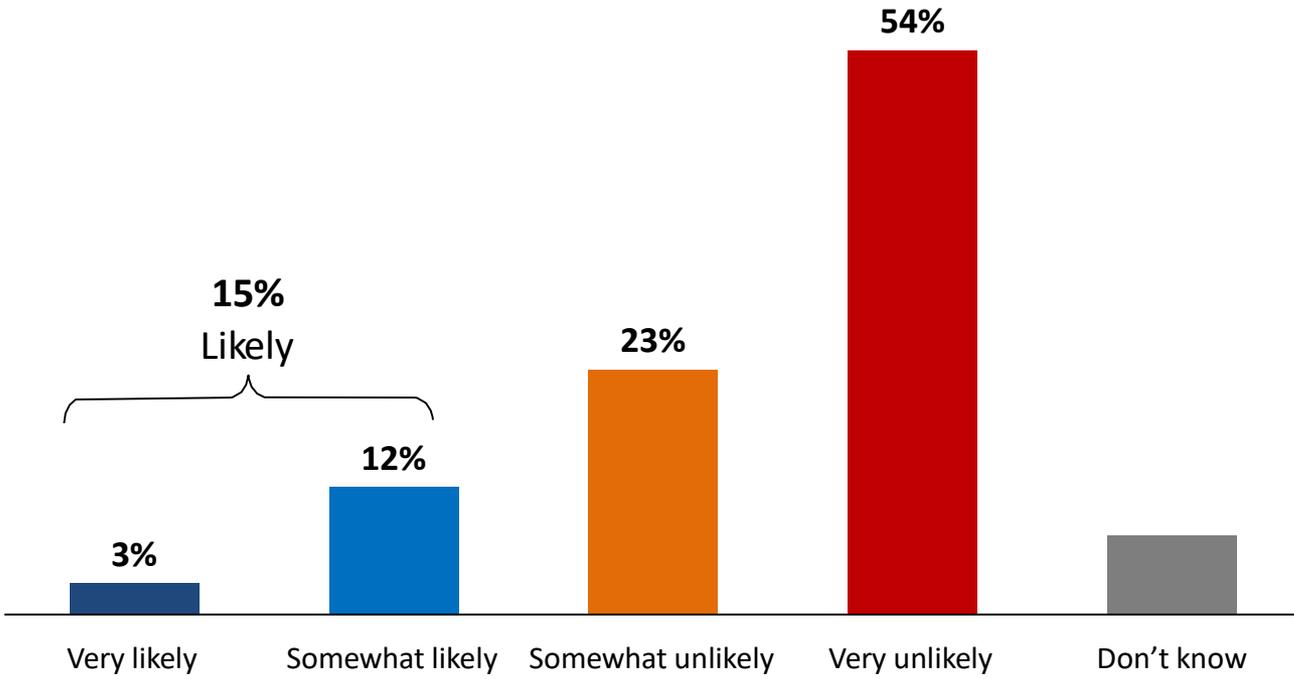
[asked of respondents who have purchased prescription medication from an online pharmacy, n=12]



# Openness to Purchasing: Young people (18-34) are most open to purchasing from online pharmacies



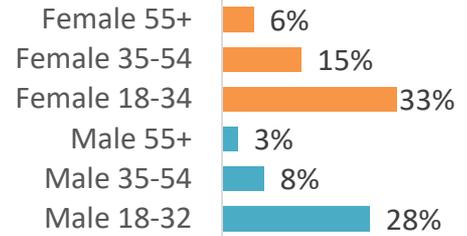
**Q** The next time you need prescription medication, either for yourself or a family member, how likely would you say you are to purchase it from an online pharmacy?  
[asked of all respondents, n=1,000]



## Segmentation

Those who say *likely*

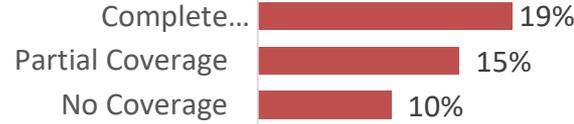
### Age/Gender



### Income



### Extended Benefits



# Openness to Purchasing by Online Shopping: Frequent online shoppers most open to online pharmacies



*“Thinking about online shopping in general, which of the following best describes how often you purchase products online?”*

Column %	About once a week	About once a month	6 to 12 times a year	Fewer than 6 times a year	Never
Very likely	9%	4%	2%	1%	1%
Somewhat likely	24%	18%	12%	6%	6%
Somewhat unlikely	22%	29%	28%	20%	14%
Very unlikely	35%	41%	51%	67%	76%
Total likely	32%	22%	15%	7%	7%
Total unlikely	57%	70%	78%	87%	90%

Note: Don't know not shown.

# Openness to Purchasing: Non-prescription drugs are most likely to be considered for online purchase

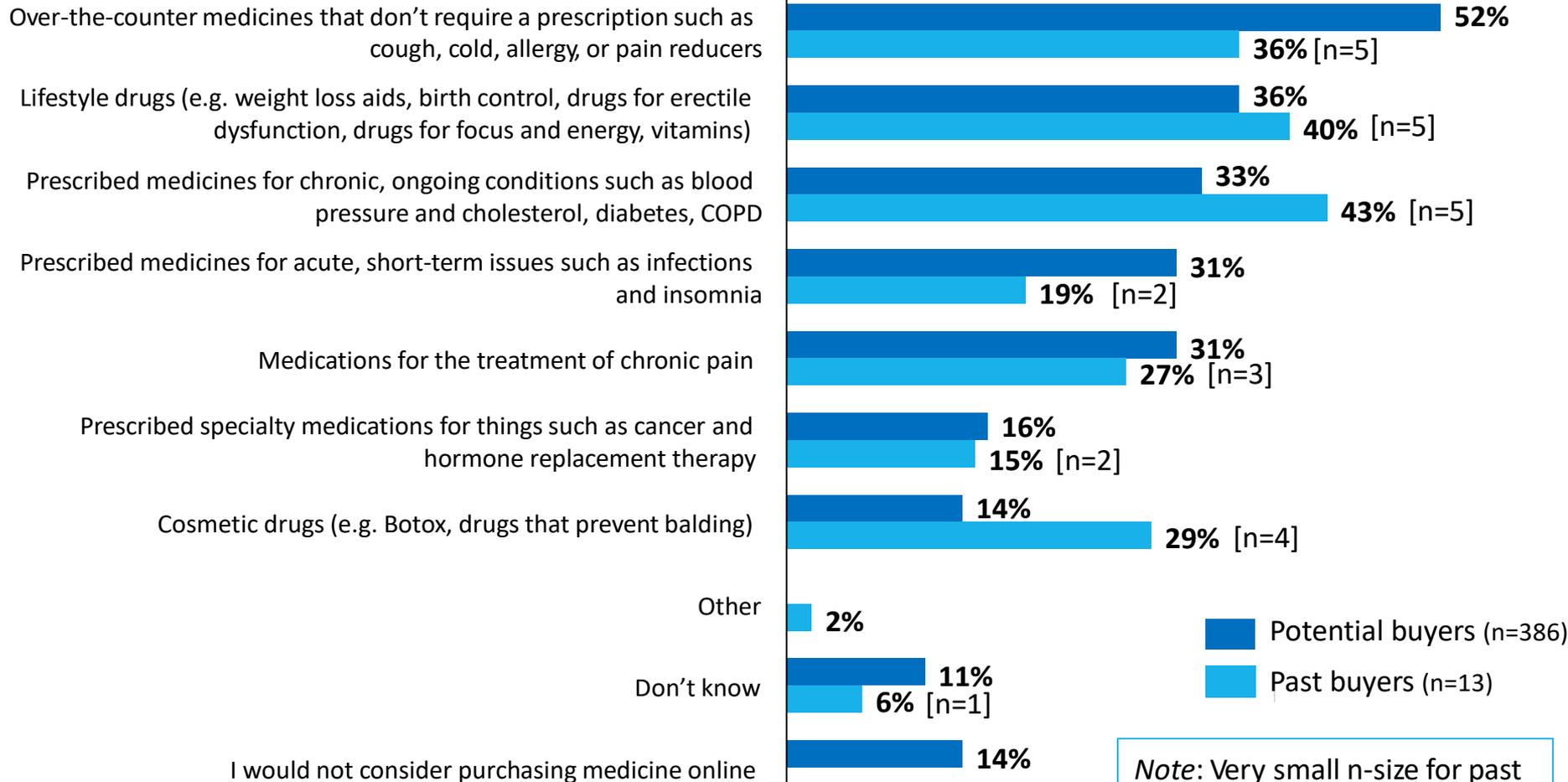


Of the following types of medicine, which have you purchased online? *PAST BUYERS*

[asked of respondents who have purchased prescription medication from an online pharmacy, n=13]

Of the following types of medicine, which would you consider purchasing online? *POTENTIAL BUYERS*

[asked of all respondents who were likely or only somewhat unlikely to purchase from an online pharmacy, multiple mention, n=386]



Note: Very small n-size for past buyers. Interpret with caution.

# Who Would Consider Which Medicine? Young women most likely to say non-prescription and lifestyle drugs



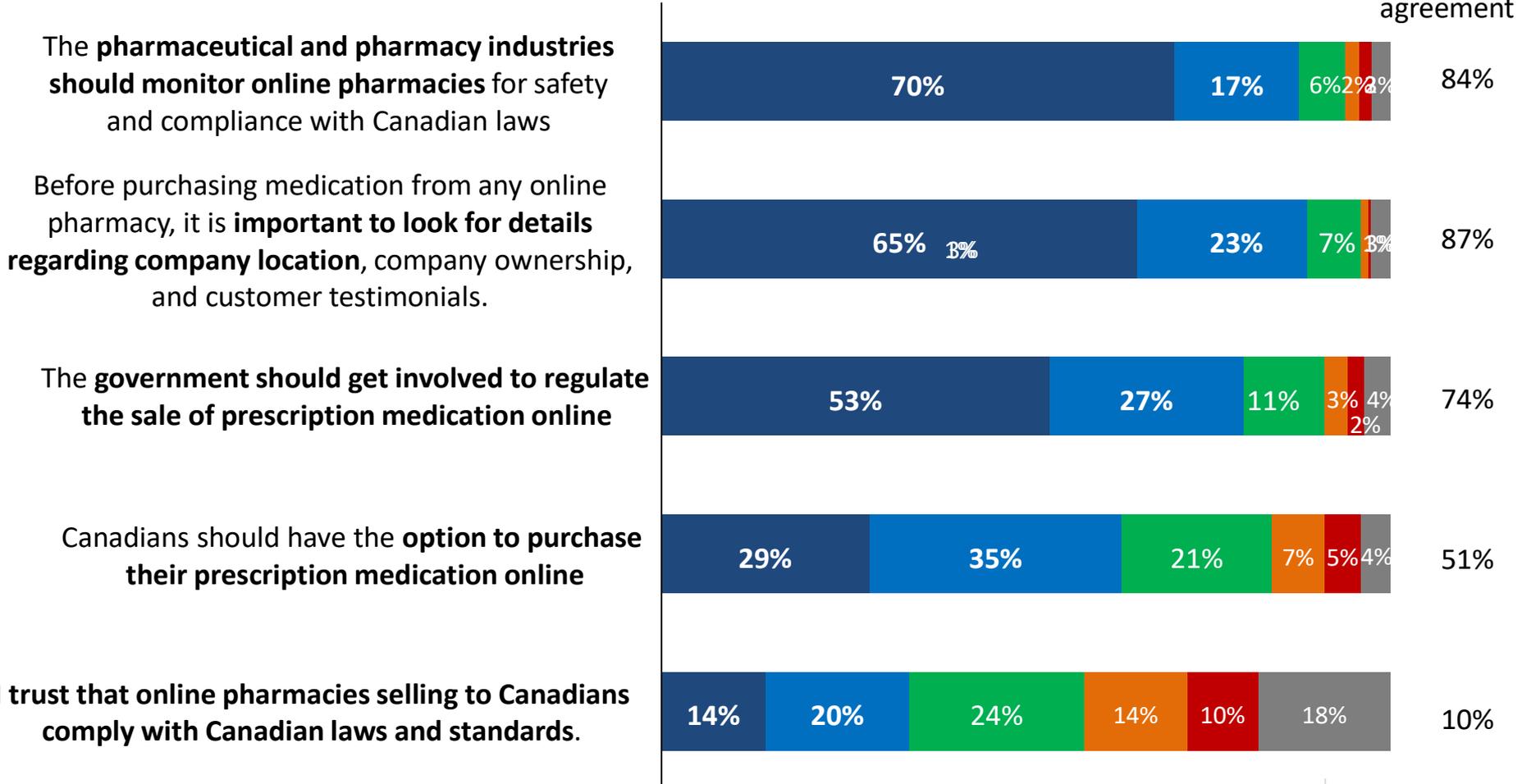
Column %	Total	Male 18-34	Male 35-54	Male 55+	Female 18-34	Female 35-54	Female 55+
Over-the-counter medicines that don't require a prescription such as cough, cold, allergy, or pain reducers	52%	59%	38%	23%	71%	52%	34%
Lifestyle drugs (e.g. weight loss aids, birth control, drugs for erectile dysfunction, drugs for focus and energy, vitamins)	36%	42%	28%	17%	54%	38%	10%
Prescribed medicines for chronic, ongoing conditions such as blood pressure and cholesterol, diabetes, COPD	33%	41%	31%	22%	30%	33%	26%
Prescribed medicines for acute, short-term issues such as infections and insomnia	31%	42%	25%	13%	32%	36%	16%
Medications for the treatment of chronic pain	31%	42%	30%	24%	31%	26%	19%
Prescribed specialty medications for things such as cancer and hormone replacement therapy	16%	19%	17%	6%	14%	22%	11%
Cosmetic drugs (e.g. Botox, drugs that prevent balding)	14%	22%	9%	6%	17%	14%	6%
I would not consider purchasing medicine online	14%	5%	12%	29%	8%	20%	24%

Note: Purchase considerations were asked of all respondents who were likely or only somewhat unlikely to purchase from an online pharmacy, multiple mention, n=386. Don't know not shown.

# Regulation: Pharmaceutical and pharmacy industries expected to play a role in online pharmacy regulation



**Q** In general, do you agree or disagree with the following statements?  
[asked of all respondents, n=1,000]



■ Strongly agree  
■ Neither agree nor disagree  
■ Somewhat agree  
■ Somewhat disagree

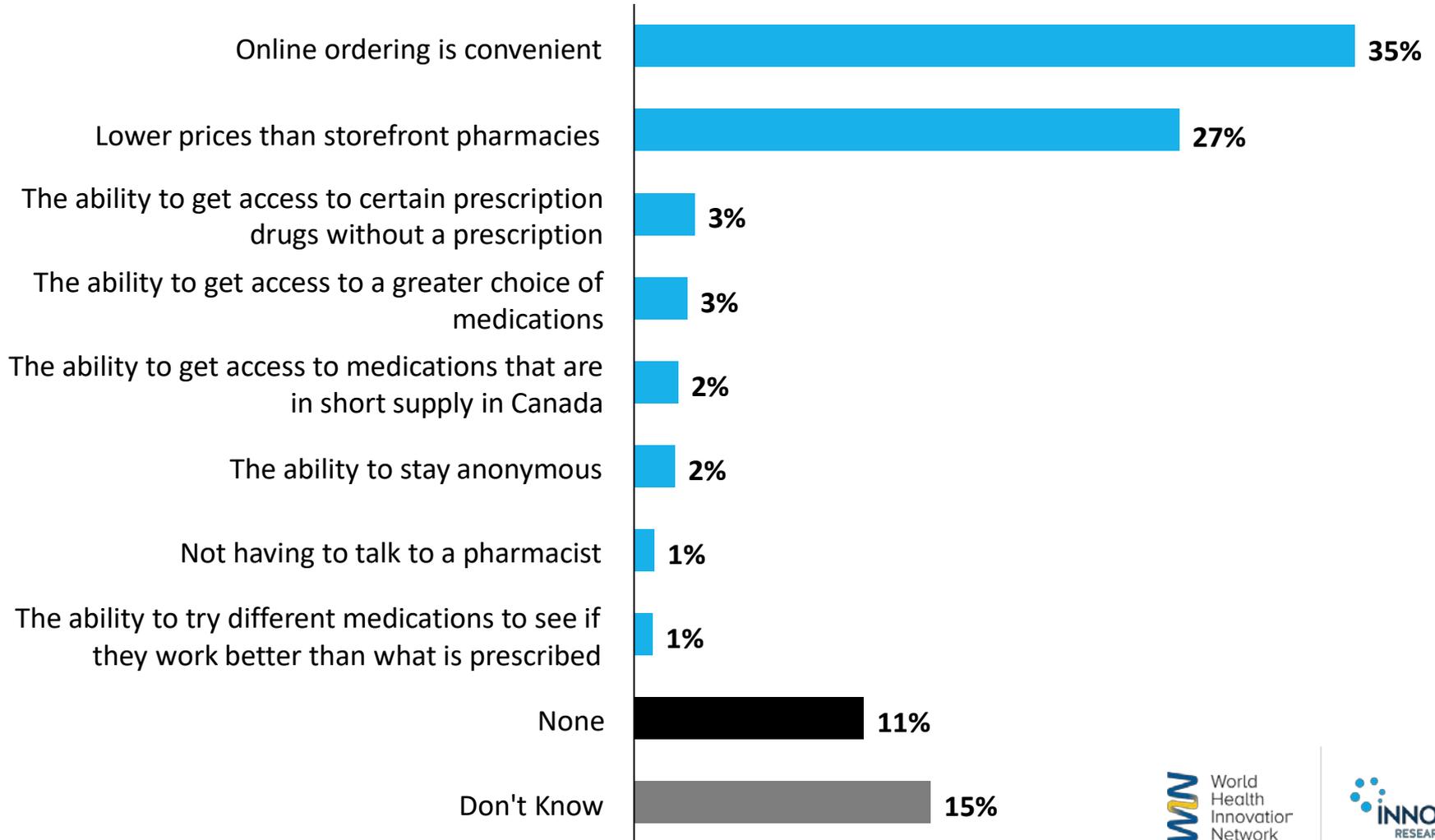


# Perceived Benefits: Convenience and lower Cost are the largest perceived benefits of online pharmacies



Based on what you've heard, or perhaps your own experience, what would you say is the **main benefit** of purchasing from online pharmacies? Would you say:

[asked of respondents, n=1,000]



# Perceived Risks: Receiving wrong or counterfeit/tainted medicines are the greatest concerns when buying online

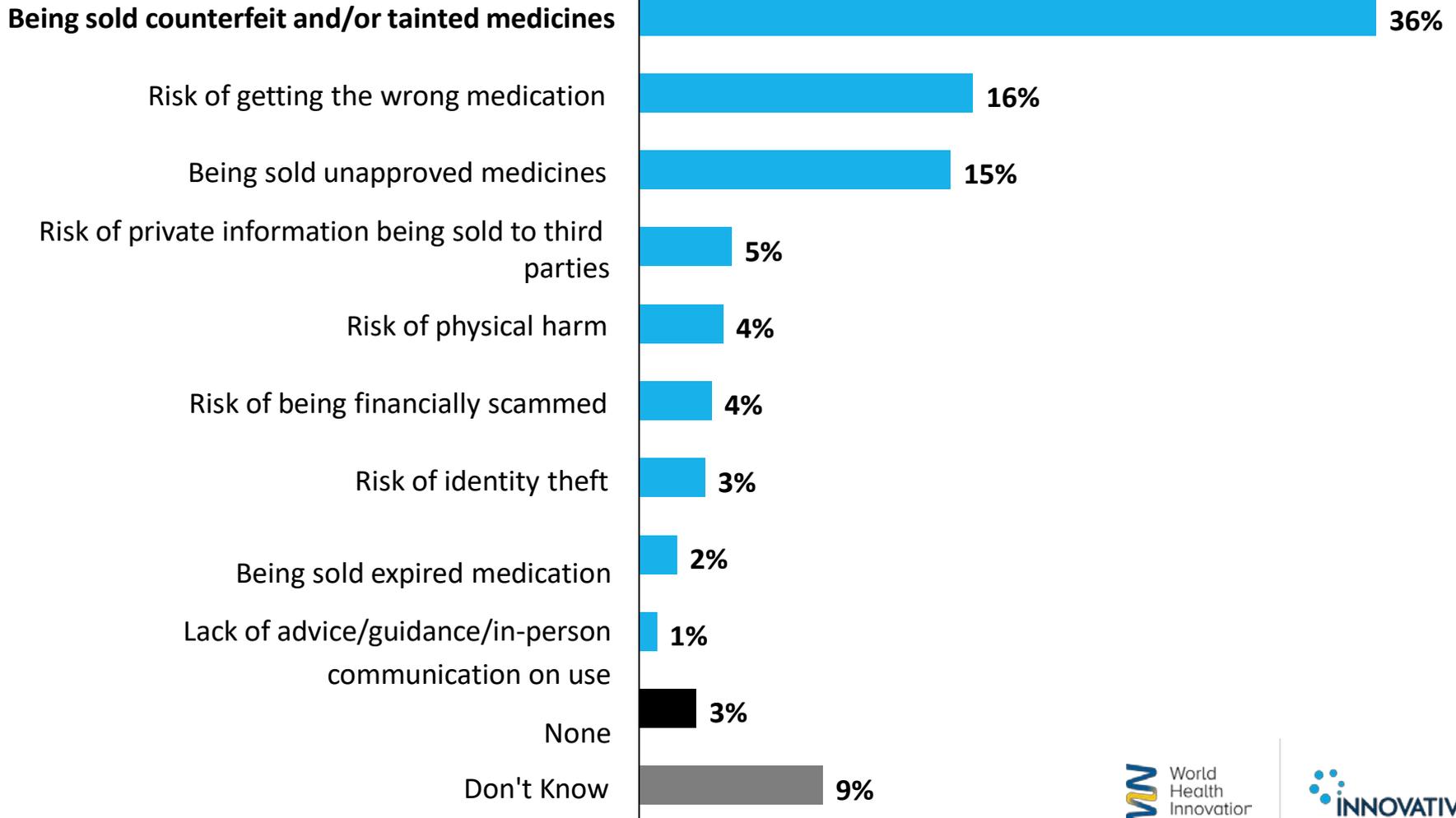


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Q

Based on what you've heard, or perhaps from your own experience, what would you say is the **biggest risk** of using online pharmacies?

[asked of respondents, n=1,000]

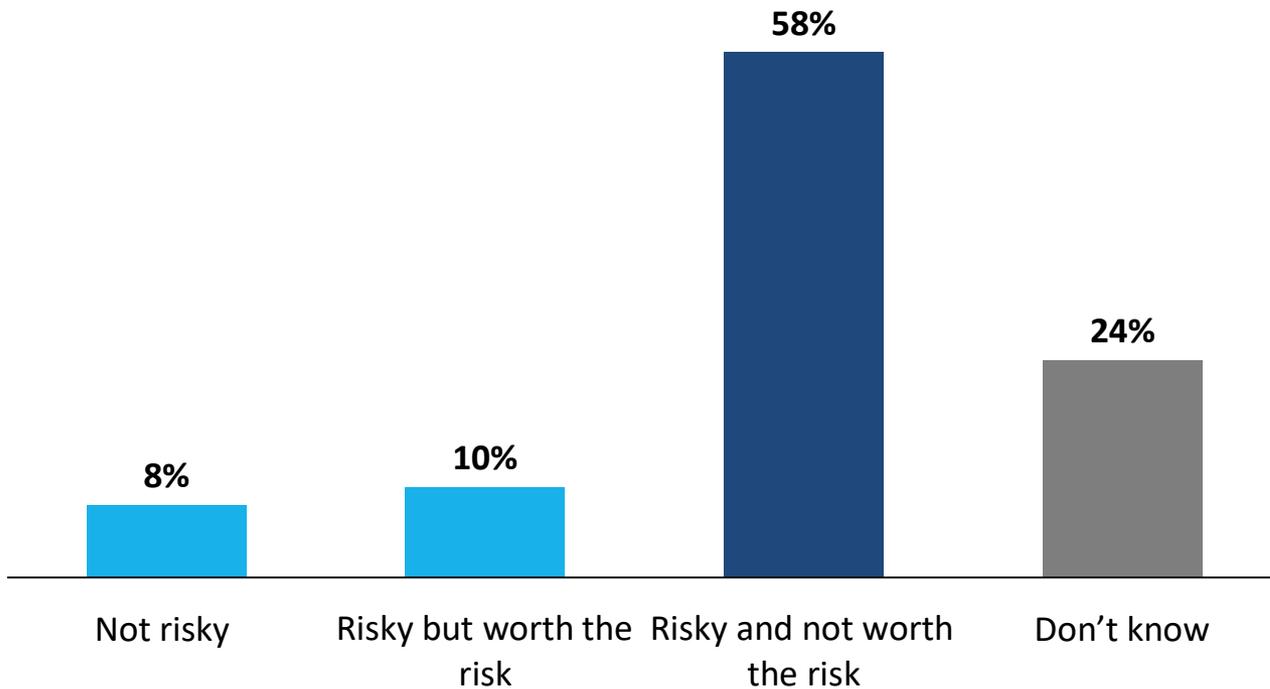


# Overall Risk: 58% view it as risky and not work the risk, young people more likely to take the risk



When it comes to ordering from an online pharmacy, how risky do you think it is?

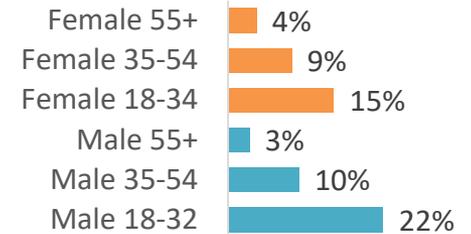
[asked of respondents, n=1,000]



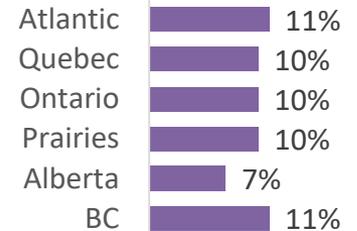
## Segmentation

Those who say *risky but worth the risk*

### Age/Gender



### Region



### Income



### Extended Benefits





# Split Sample: Question order

Sample A  
[n=479]

**1** Research by the National Association of Boards of Pharmacy has found that there are between 30,000 and 35,000 online pharmacies operating at any one time. That research reports that more than 96% of them are operating illegally, failing to comply with applicable laws and safety standards, and approximately 12% of these sites sell controlled substances. Were you previously aware of this?

**2** People have varying opinions about the role the **Canadian government** should play when it comes to online pharmacies. Please indicate how important you think each of the following types of government involvement is for protecting Canadian consumers.

**3** To the best of your knowledge, is buying prescription medications online...

Sample B  
[n=522]

**1** People have varying opinions about the role the **Canadian government** should play when it comes to online pharmacies. Please indicate how important you think each of the following types of government involvement is for protecting Canadian consumers.

**2** To the best of your knowledge, is buying prescription medications online...

**3** Research by the National Association of Boards of Pharmacy has found that there are between 30,000 and 35,000 online pharmacies operating at any one time. That research reports that more than 96% of them are operating illegally, failing to comply with applicable laws and safety standards, and approximately 12% of these sites sell controlled substances. Were you previously aware of this?

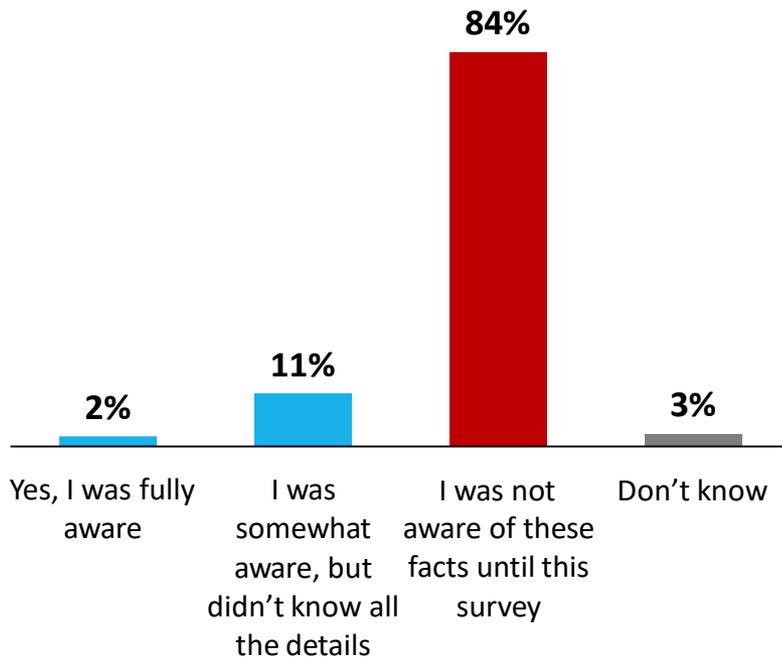
# Awareness of Research: Clear majority was unaware of the research regarding illegal online pharmacies



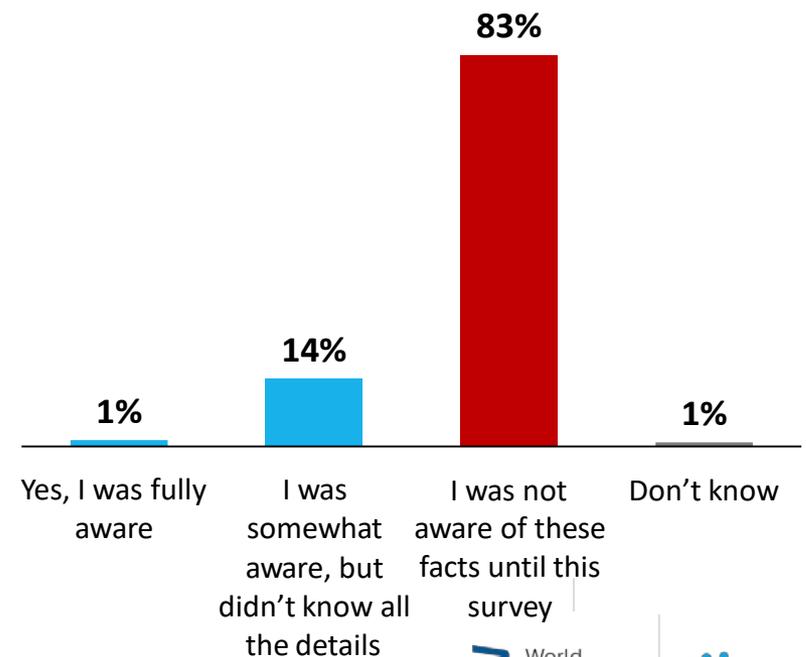
**Q** Research by the National Association of Boards of Pharmacy has found that there are between 30,000 and 35,000 online pharmacies operating at any one time. That research reports that more than 96% of them are operating illegally, failing to comply with applicable laws and safety standards, and approximately 12% of these sites sell controlled substances. Were you previously aware of this?

[asked of respondents, split sample]

Shown this question first  
[n=479]



Shown this question second  
[n=522]

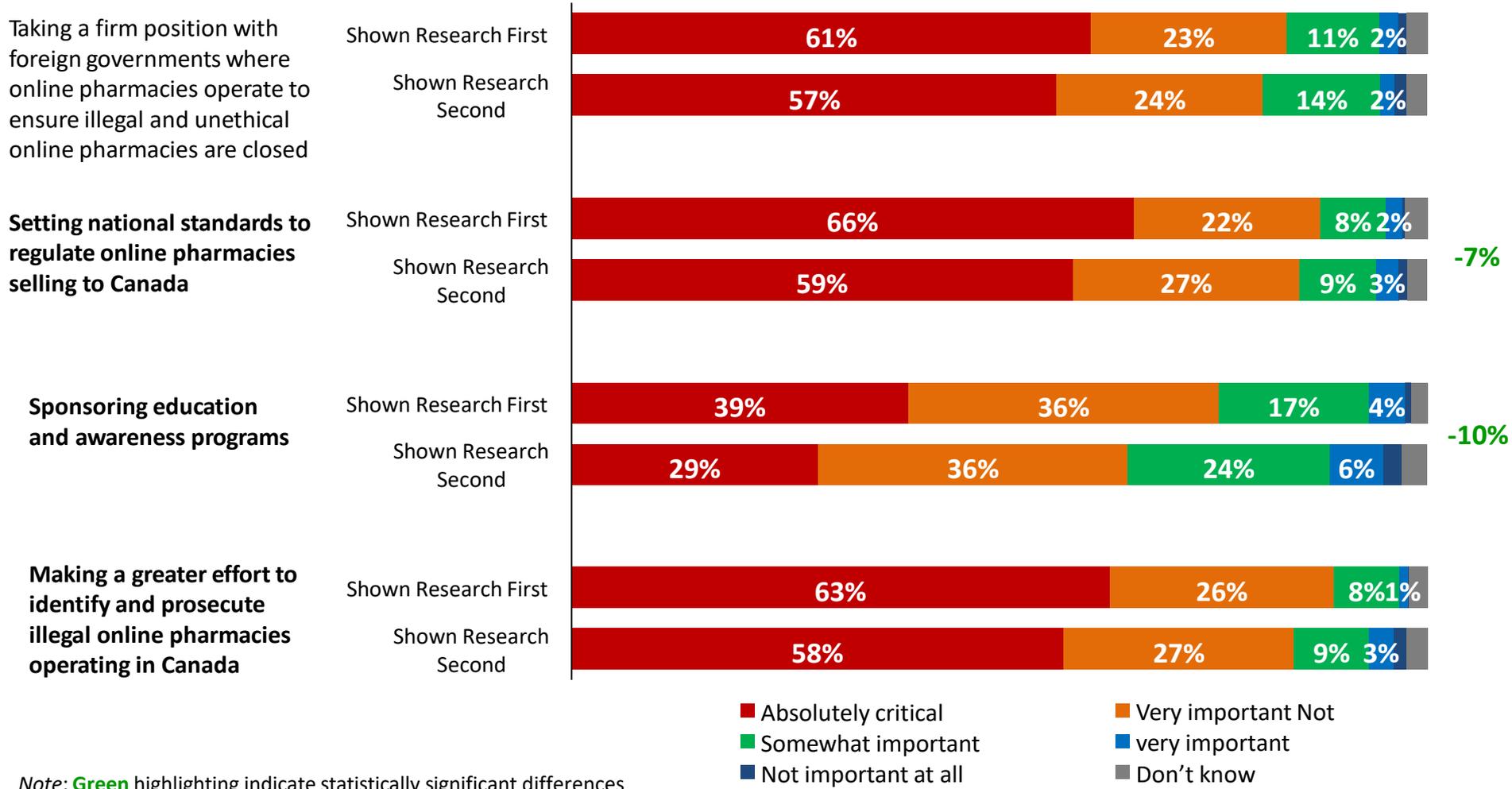


# Regulation: Efforts to regulate online pharmacies and close illegal operations seen as most important



People have varying opinions about the role the **Canadian government** should play when it comes to online pharmacies. Please indicate how important you think each of the following types of government involvement is for protecting Canadian consumers.

[asked of all respondents, split sample]



Note: Green highlighting indicate statistically significant differences (95%-level) in the percentage of respondents saying “absolutely critical.”



# Key Findings

1. Just over half of Canadians (55%) have at least heard of online pharmacies, but **very few (1%) have purchased from online pharmacies before.**
2. About 1-in-6 respondents (15%) say they are at least somewhat likely to purchase from online pharmacies the next time they need a prescription medication. **Non-prescription drugs are most likely to be considered for online purchase.**
3. Pharmaceutical and pharmacy industry, as well as government are expected to play a role in online pharmacy regulation.
4. **Convenience and lower prices** are the largest perceived benefits of online pharmacies, while receiving wrong or counterfeit medicines are the biggest concerns when buying online.
5. **Canadians know little about online pharmacies and their legal status in Canada.** While Canadians generally place a high priority on government action to protect Canadians using online pharmacies, that priority increases when respondents learn about compliance issues with existing online pharmacies.