



*For confidence and safety in the marketplace since 1899*

**Sally Greenberg, Executive Director**  
**ASOP Global's Spotlight on Illegal Online Drug Sales Research Symposium**  
November 14, 2018

# ***The National Consumers League: America's pioneering consumer advocacy organization***

## **Priority Issues:**

- Health policy
- Food safety and nutrition
- Child labor
- Fraud, privacy, telecommunications and technology



# Background & Objectives

Despite efforts by the FDA to control it, it is believed there is a fair amount of ED drug purchasing on the Gray Market (unauthorized sales at online pharmacies, often not requiring a prescription).

To better understand the prevalence of and motivations for gray market purchases, Bayer commissioned a survey of U.S. men to gauge key questions on the issue.

## Specifically, the survey sought to:



Quantify the number of U.S. men purchasing from the Gray Market



Understand the profile of these consumers compared to ED Treaters who use legitimate channels to obtain ED medication



Understand motivation to purchase on Gray Market and potential risk associated with forgoing the healthcare system

# How we defined the “gray market” and “gray market purchasers”

**Gray Market Purchasers** were defined as consumers who purchased ED medication in the past 12 months from an online website that:

Does not require a prescription

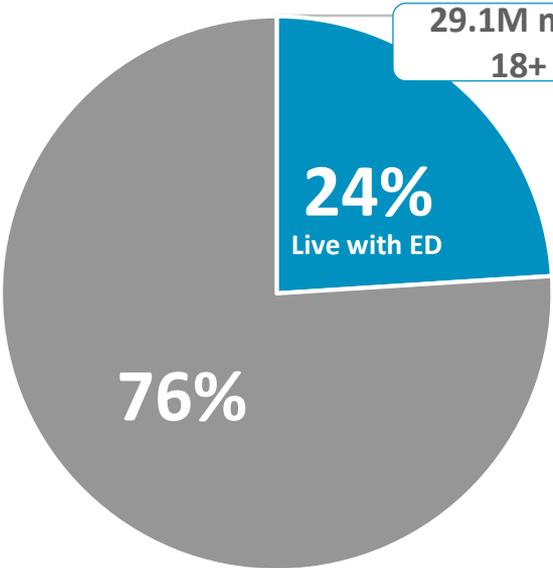
OR

Requires a prescription or offers a prescription from an online doctor AND ...

1. Ships from outside the U.S. OR
2. Offers an unregulated form or name (super, extra), OR
3. Offers to autofill purchases, OR
4. Encourages purchase of larger quantities (e.g., buying bulk supply to save money)

# U.S. men living with ED: A closer look

24% of the U.S. male population lives with ED



Only half treat with ED medication (Rx, Herbals or Other)



11% of the total U.S. male population treats ED

...and 16% of ED treaters purchase medication through a Gray Market channel



2% of the total U.S. male population purchase ED products from gray market websites

\*11% of the general population are ED Treaters  
\*\*2% of the general population are Gray Market Purchasers



## ED Medication Prescription Behavior

### P12M Gray Market Purchasers

**Do you typically order ED prescription medication online using...**

*(Ordered ED meds 2+ times)*

- The same website
- Different website
- Don't know/not sure

*(n=197)*

64%  
29%  
8%

**Before you made your online purchases, did you speak with a HCP about ED?**

*(Have ever consulted HCP about ED)*

- Yes
- No

*(n=188)*

75%  
25%

**Has a HCP ever provided you with a prescription for ED medication?**

*(Have ever consulted HCP about ED)*

- Yes
- No

*(n=188)*

81%  
19%

### P12M Gray Market Purchasers

**Why didn't the HCP provide you with a prescription for ED medication?**

*(Doctor did not provide prescription)*

- Doctor felt I didn't need it
- Doctor recommended nutritional/herbal supplements
- Doctor recommended other ways to treat (e.g. exercises, acupuncture, meditation, therapy, etc.)
- Doctor felt it would interact with other medications I'm taking
- Doctor felt it would interact with other health conditions I have
- I didn't have insurance that would cover a prescription
- Other

*(n=36)*

22%  
17%  
28%  
11%  
11%  
28%  
17%

**Did the HCP do any tests to explore your difficulty achieving or maintaining erections before providing you with a prescription for ED medication?**

*(Doctor provided prescription)*

- Yes
- No

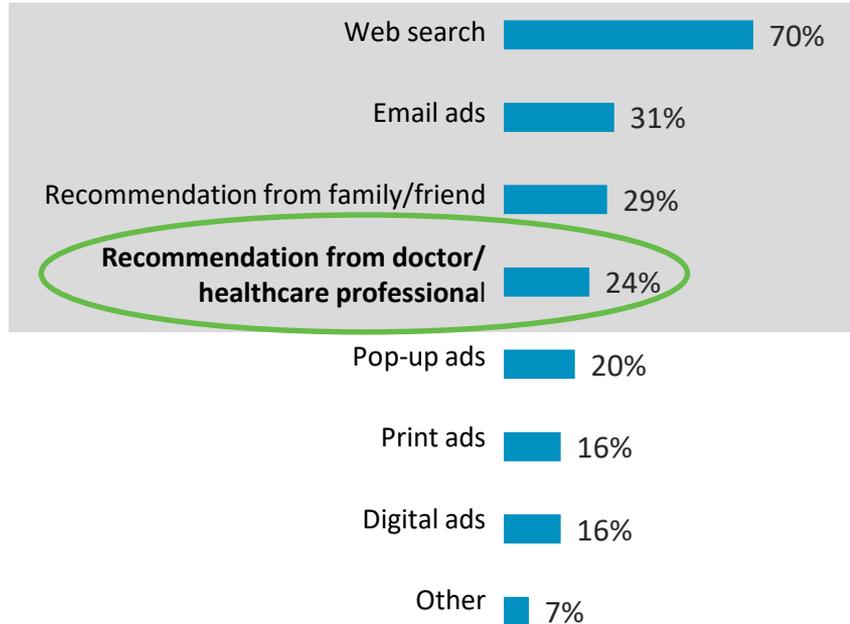
*(n=152)*

55%  
45%

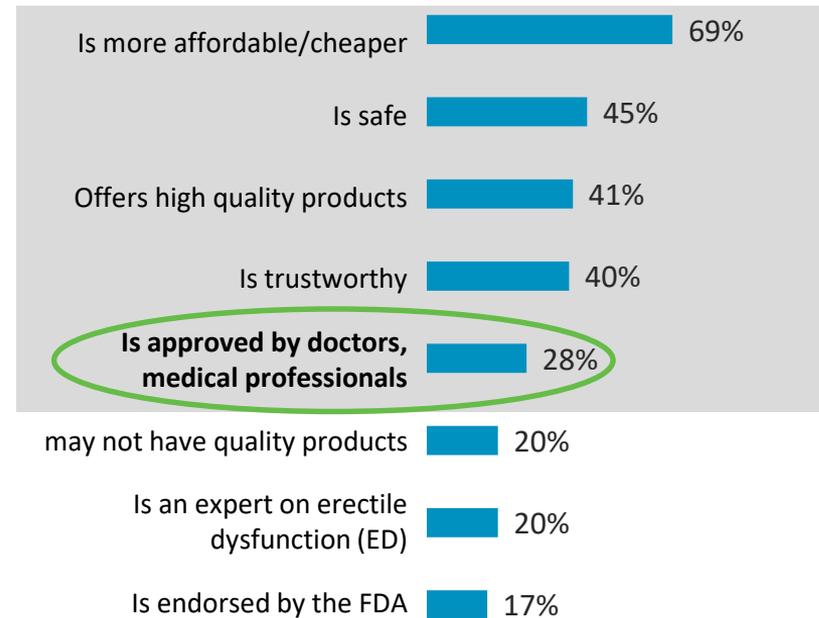
Most Gray Market Purchasers become aware of Gray Market through web searches, and many believe the websites offer a more affordable solution for ED. **Surprisingly, many consumers became aware of the sites via their HCPs and feel they're approved by medical professionals.**

## Gray Market Websites

### How Did You Become Aware?

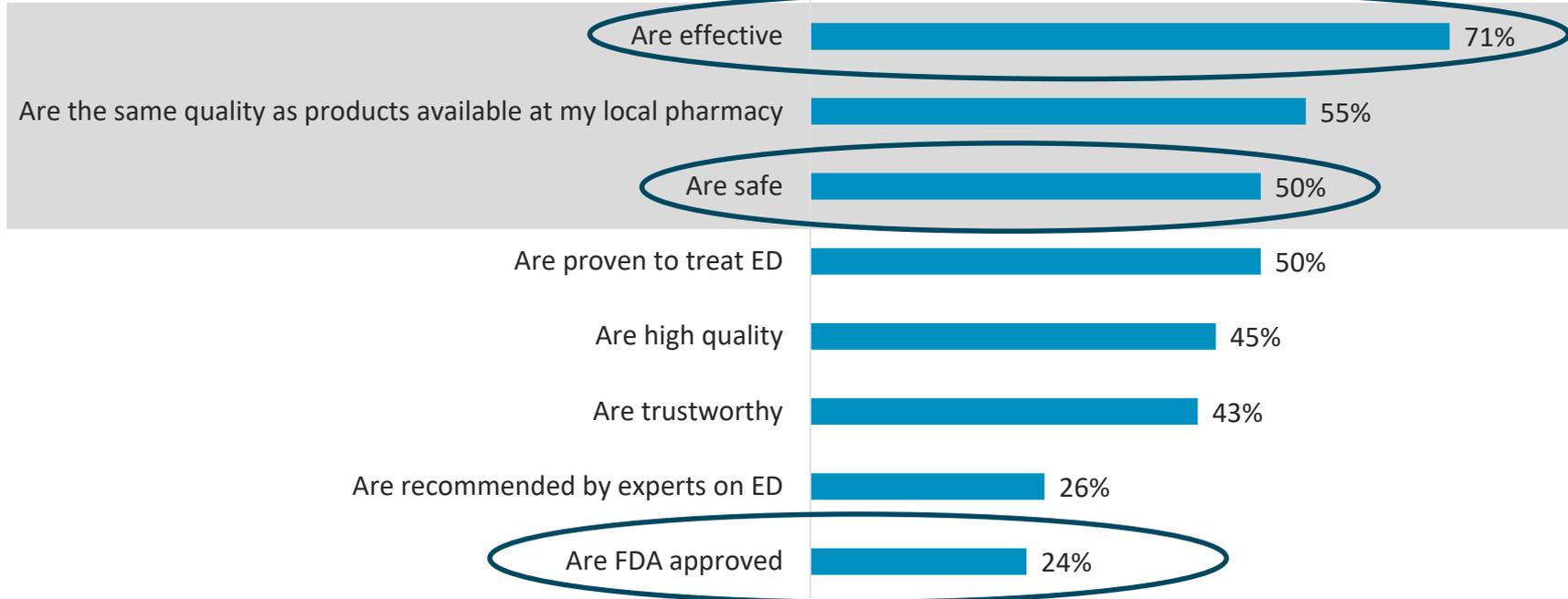


### Gray Market Website Perceptions



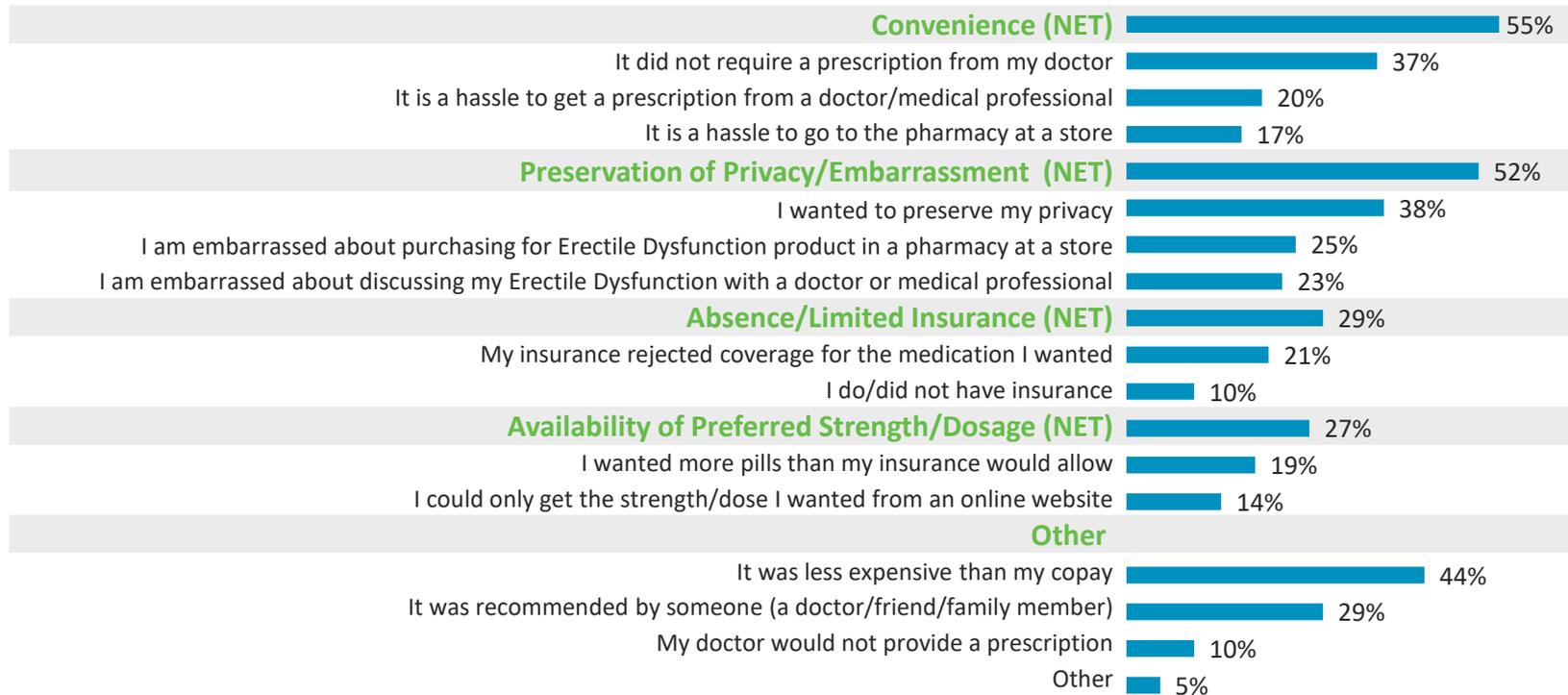
In addition, while few consumers believe products from these sites are FDA approved, most feel they are effective, **and half feel they are safe.**

## What do you associate with the medications from these Gray Market websites?



# Men stated their primary reasons for purchasing from Gray Market as convenience and privacy/embarrassment.

## Reasons for Purchasing from Gray Market



\*Note – highlighted attributes indicate net of the below attributes

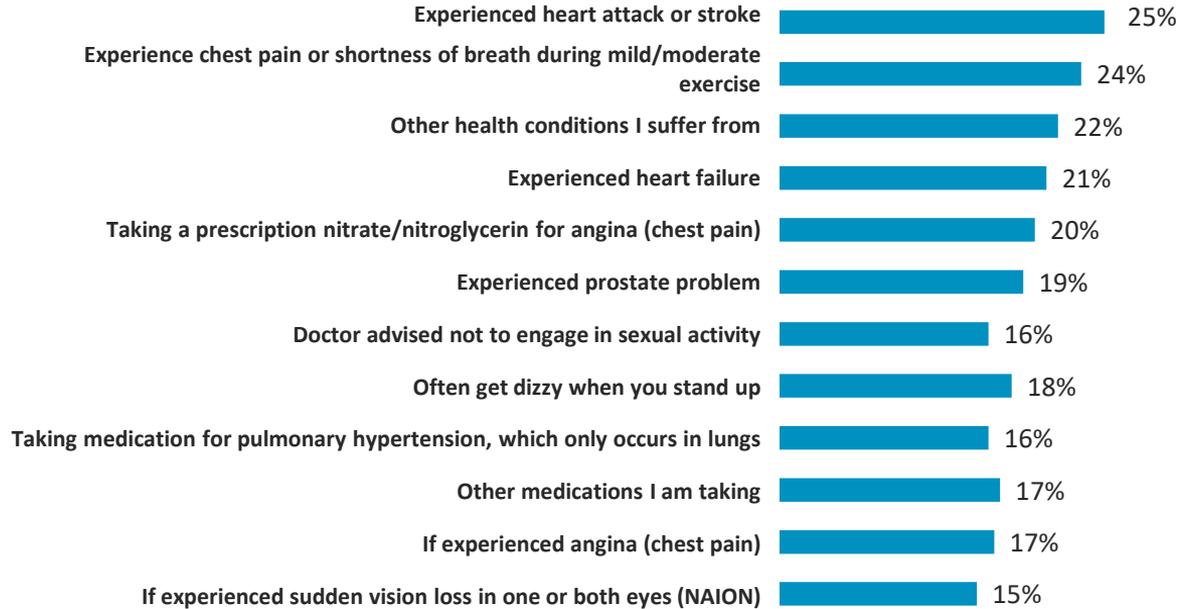
Base: P12M Gray Market Purchasers (n=221)

Q10b. Now which of the below reasons motivated you to purchase from these types of websites for ED medications?



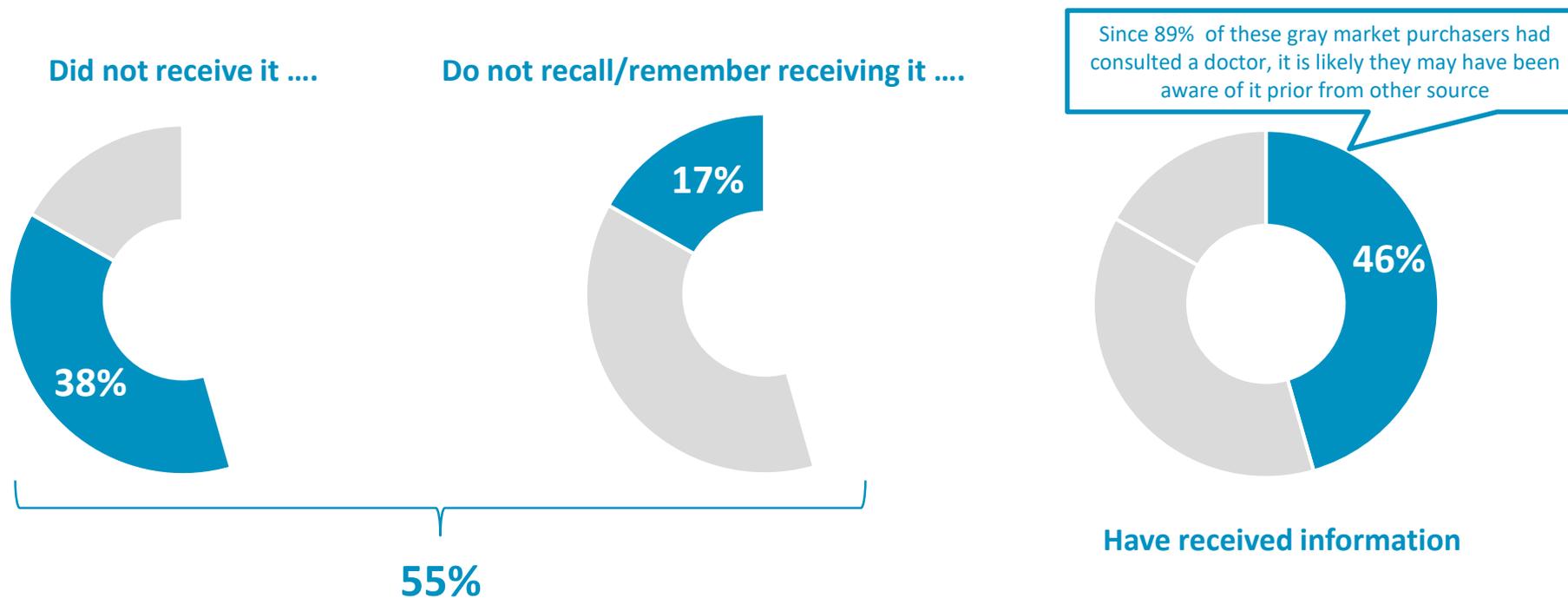
Of all Gray Market purchasers, **only 25% or fewer are asked to provide medical history** especially about their heart health putting them at increased health risk.

## Medical History Asked Prior to Purchase



Furthermore, **more than half of Gray Market Purchasers are not provided OR do not recall receiving any information** from the Gray Market sites of a potential underlying cardiovascular conditions even if they currently don't have symptoms.

## Information from the Website on Linkage Between ED and Cardiovascular Conditions



In addition, **2/3 of Gray Market Purchasers** claimed the package they received did not provide contraindications related to nitrates/nitroglycerin use. Other warnings and information is also provided infrequently.

## Education and Information included in the package

### Types of Information Included

#### General information

Directions to use 59%

Expected side effects 51%

#### Product related information

Info about issues that can occur due to ED 36%

Warning when to stop use 35%

Warnings related to nitrate/nitroglycerin use 33%

Warning to ask a doctor before use 32%

Info about importance of talking to a doctor about ED 30%

Info about the link between ED and cardiovascular disease 25%

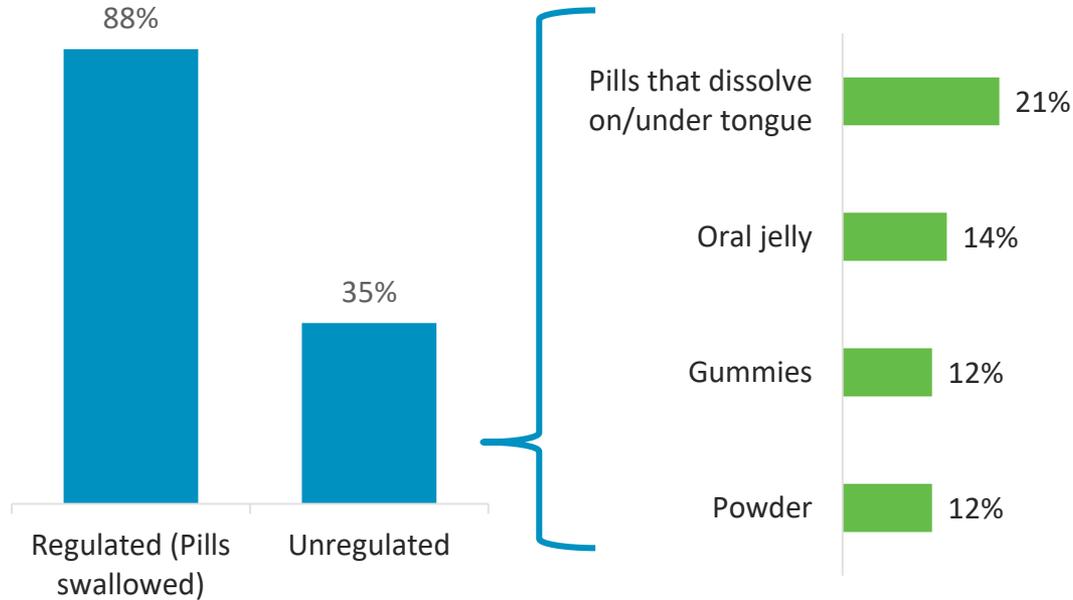
Warning when not to begin use 19%



**4 out of 10** Gray Market Purchasers have bought unregulated ED products.

## Ordering Unregulated ED Products

### Forms Ordered



**4 in 10**

Have ordered ED medication labeled  
“Extra, Super, Active,” etc.

Gray Market websites also encourage larger purchases of ED medications – capitalizing on consumer’s cost consciousness.

## Encouragement to Purchase More From Gray Market



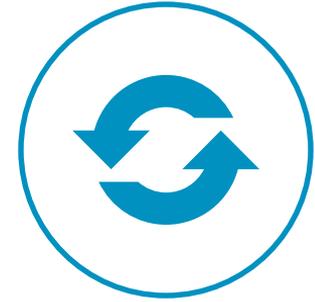
8 in 10

**Were encouraged to purchase larger quantities to save money**



5 in 10

**Received follow-up calls to purchase larger quantities**



5 in 10

**Received an offer to autofill their prescription**

Gray Market Purchasers receive on average **37 pills per order** and on average they reported **purchasing from these websites for ~4 years**.

## Purchase Details and Length of Using Gray Market Websites

### Average # of Pills Ordered Per Purchase

*(among those purchasing ED from Gray Market more than once)*



37 pills

### Length Of Time Ordering ED Meds from Gray Market

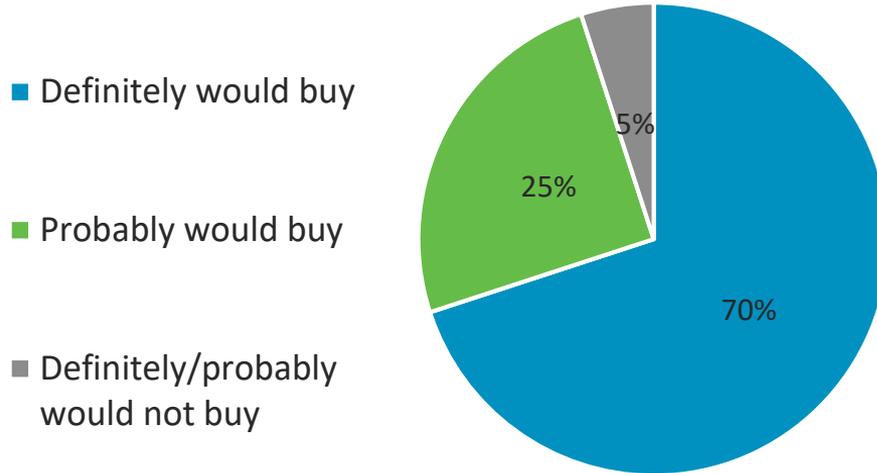
*(among those purchasing ED from Gray Market more than once)*



3.8 years

# Majority of Gray Market Purchasers surveyed (70%) said they would definitely buy ED medicines if available as an OTC product

## Purchase Interest of ED Medication if Over The Counter



# Five Recommendations to Promote Consumer Safety

- Enhancing consumer awareness about the dangers of the gray market and promoting health literacy.
- Educating healthcare providers about the importance of talking to their patients about sexual health and the risks of purchasing ED medications from illegal online pharmacies.
- Increasing access to safe and effective ED medicines by making them available OTC.
- Supporting collaborative law enforcement and regulatory efforts.
- Adding to the body of evidence on the gray market.

# Thank You!

Sally Greenberg, NCL Executive Director  
[sallyg@nclnet.org](mailto:sallyg@nclnet.org)