



Research+Data Insights recently completed a survey of 808 Online Shoppers nationwide on behalf of CSIP. The survey was fielded online from September 10-13, 2015. All respondents were drawn from an online research panel and screened to ensure that they have purchased goods or services online in the past 12 months.

We also included questions in the survey to identify consumers that have purchased prescription medications online, and captured responses from 222 consumers that fit this criterion within the general online shopper sample framework. We have included those numbers in this document to compare the prescription shopper responses with the more general online shopping audience.

Below is an overview of key findings from the survey. Topline results from each question can also be found on the pages that follow.

## PRESCRIPTION PURCHASING PATTERNS

- 1. A majority of online shoppers have either purchased prescription medications online in the past or plan to in the future.**
  - More than one-in-five online shoppers (27%) say they have purchased prescription medications online before, and 56% say they will likely purchase some type of prescription medication online in the future.
  - Among those who have purchased prescriptions online before, 93% say they will likely purchase prescriptions online again in the future.
- 2. Most prescription shoppers have bought medication online recently and chronic illness/maintenance drugs top the list of those being purchased online.**
  - Nearly half of prescription shoppers (45%) have purchased prescriptions online in the past month and another 32% have purchased between 1-6 months ago.
  - Of the prescription medications being purchased online, chronic illness/maintenance drugs (e.g. heart, diabetes, HIV, blood pressure) top the list at 58%.
  - Several other drug categories fall under the 20% mark, including pain medication (19%), diet (16%), and sexual health/lifestyle (16%).
- 3. While most prescription shoppers were required to provide a prescription from a doctor they saw in person, nearly one-in-five have purchased illegally.**

- More than eight-in-ten (82%) say they have purchased prescription medication through an online pharmacy that required them to provide a prescription from a doctor that they saw in person.
  - Another 18% say they either got a prescription from a doctor online through the website (9%) or did not have to provide a prescription at all to purchase medication (9%).
- 4. Cost and convenience top the list of reasons why prescription shoppers would prefer to purchase their prescriptions online.**
- More than four-in-ten (44%) say they would prefer to buy prescriptions online rather than a traditional pharmacy because the medications are less expensive online.
  - Another third cite convenience (33%).
- 5. Quality of the product and identity theft tops the list of concerns over purchasing prescription medications online.**
- One-third or more say that they are concerned about the quality of the product (36%) and identity theft (33%) when they purchase prescription medications online. Safety of the product (24%), spam (15%) and malware (13%) are less of a concern.
- 6. A majority of prescription shoppers pay for their medications online with a credit card, and common payment logos are the first thing they look for when purchasing.**
- Two-thirds of prescription shoppers (66%) say they used a credit card to purchase online prescription medications. Another 24% use a debit card or bank account and 18% use PayPal or a similar payment website.
  - When asked what information they look for when purchasing prescription medications online, 41% cite common payment logos (e.g. PayPal, MasterCard, Visa, Amex, Discover, etc.), while 35% say they look for the permanent address/pharmacy associated with the website or the VIPPS logo (34%).

## SAFETY OF ONLINE PRESCRIPTION MEDICATIONS

- 7. A majority of online shoppers feel it is safe to purchase prescription medications online, but they do have similar concerns about safety to that of purchasing financial services.**
- Two-thirds of online shoppers (66%) feel it is safe to buy prescription medications online – 98% of prescription shoppers feel it is safe.
  - When asked more specifically about safety concerns of several product categories they might purchase online, 68% said they were concerned about purchasing financial services and 66% said they were concerned about purchasing prescription medications.

## MESSAGE TESTING + INFORMED BALLOT

**8. While all statements we tested were rated as convincing by a majority of respondents, statements about the ineffectiveness of or safety issues associated with prescription medications purchased from questionable online sources are rated as most convincing.**

- Respondents rated each of the following statements as a convincing reason NOT to purchase prescription medications online from questionable sources:
  - *Illegal online drug sellers may sell you medicine that does not work or is dangerous to your health* (Total 81%; Prescription Shoppers 69%)
  - *Illegal online drug sellers source products from countries with lax regulations around pharmaceuticals, making those products unsafe* (Total 80%; Prescription Shoppers 70%)
  - *Illegal online drug sellers utilize malware, spam, and engage in identity theft* (Total 78%; Prescription Shoppers 68%)
  - *95 percent of online drug sellers are out of compliance with laws/regulations* (Total 70%; Prescription Shoppers 60%)

**9. Message statements about illegal pharmacy sites have a significant impact on perceptions of safety and likelihood to purchase prescription medications online in the future.**

- Informed ratings of safety for purchasing prescriptions online decreased from 66% to 49% among general online shoppers and from 98% to 85% among those who have previously purchased prescriptions online.
- Informed likelihood of purchasing in the future decreases from 56% to 41% among general online shoppers and from 93% to 83% among those who have previously purchased prescriptions online.

## INFORMATION SOURCES + CREDIBILITY TEST

**10. Health insurance and healthcare company websites prove as important sites in terms of gathering information about buying prescription medications online.**

- A majority of general online shoppers and prescription shoppers say they would look for more information on traditional pharmacy websites (Total 60%; Prescription Shoppers 51%) and health insurance company websites (Total 54%; Prescription Shoppers 59%).
- Further, more than eight-in-ten say that they trust health insurance companies or healthcare companies as a source of information about online pharmacies – this is significantly higher than non-profit organizations, online search engines and news media.

**CSIP Survey Topline Results**  
**n=808 Online Shoppers; n=222 Prescription Shoppers**  
**Fielded online September 10-13, 2015**

**Prescription Medication Purchasing**

1. Have you ever purchased any type of prescription medication online?

% Total	% Prescription Shoppers	
27	100	Yes
72	-	No
1	-	Don't know

**IF Q1=YES, ASK Q2; IF Q1=NO OR DON'T KNOW, SKIP TO Q3**

2. When did you last purchase a prescription medication online?

% Total	% Prescription Shoppers	
-	45	Within the past month
-	32	Between 1-6 months ago
-	10	Between 6 months and a year ago
-	12	More than a year ago
-	*	Don't know

3. How likely are you to purchase any type of prescription medication online in the future?

% Total	% Prescription Shoppers	
25	69	Very likely
31	24	Somewhat likely
18	4	Not very likely
21	1	Not at all likely
6	2	Don't know
		<b><u>Collapsed</u></b>
56	93	Likely
39	5	Not likely

**IF Q1=YES, ASK Q4-11; IF Q1=NO OR DON'T KNOW, SKIP TO Q12**

4. What types of prescription medication have you purchased online before? Select all that apply.

% Total	% Prescription Shoppers	
-	58	Chronic illness/maintenance drug (e.g. heart, diabetes, HIV, blood pressure)
-	19	Pain medication
-	16	Diet
-	16	Sexual health/Lifestyle (e.g. erectile dysfunction, baldness, smoking cessation, cosmetic, female hormone supplement)
-	11	Anti-bacterial, anti-biotic, anti-fungals or anti-virals
-	8	Fertility medication/ birth control
-	10	None of the above

- \* Don't know
5. Were you required to provide a prescription when purchasing your prescription medication online?

% Total	% Prescription Shoppers	
-	82	Yes, I have purchased prescription medication through an online pharmacy that required me to provide a prescription from a doctor that I saw in person
-	9	Yes, and I got the prescription from a doctor online through the website
-	9	No, I did not have to provide a prescription to purchase the medication online
-	*	Don't know

6. When you shop for prescription medications online, do you look for particular brands or generic products?

% Total	% Prescription Shoppers	
-	14	Brand name prescriptions
-	45	Generic prescriptions
-	40	Both
-	1	Don't know

7. Why do you look for [particular brands/generic products/particular brands and generic products)? **[SEE EXCEL]**

8. Which of the following factors do you feel MOST describes why you would prefer to buy prescription medications online rather than physically going to a pharmacy?

% Total	% Prescription Shoppers	
-	44	Less expensive
-	33	Convenient
-	9	Can buy larger quantities
-	5	Faster
-	3	More private
-	3	Safer
-	1	Can buy without a prescription
-	2	Other (Please specify)

9. Do you have any concerns when you purchase prescription medications online with regards to either the product itself or for your personal information? Select all that apply.

% Total	% Prescription Shoppers	
-	36	Quality of the product
-	33	Identify theft
-	24	Safety of the product
-	15	Spam
-	13	Malware
-	20	Other (Please specify)

10. What information do you look for when purchasing prescription medications online? Select all that apply.

% Total	% Prescription Shoppers	
-	41	Common payment logos (e.g. PayPal, MasterCard, Visa, AMEX, Discover, etc.)
-	35	Permanent address/pharmacy associated with website
-	34	Verified Internet Pharmacy Practice Sites (VIPPS) logo
-	29	Pharmacist information or availability of consultation
-	22	Appearance/quality of the website
-	18	None of the above
-	4	Don't know

11. How do you typically pay for your prescription medications online? Select all that apply.

% Total	% Prescription Shoppers	
-	66	Credit card
-	24	Debit card tied to bank account or entering bank account info
-	18	PayPal or similar payment websites
-	5	Other (Please specify)

### Safety of Online Prescription Medications

12. Please indicate how concerned you are or would be about the safety of each of the following products if you were to purchase them online.

	Not at all concerned	Not very concerned	Somewhat concerned	Very concerned	Not applicable	Don't know	Collapsed	
							Concerned	Not concerned
Financial services								
% Total	9	18	37	31	3	2	68	27
% Prescription Shoppers	13	19	35	27	4	2	62	32
Prescription medications								
% Total	11	19	35	31	2	2	66	29
% Prescription Shoppers	20	25	39	16	*	-	55	45
Children's products								
% Total	20	28	23	15	11	3	38	48
% Prescription Shoppers	19	24	27	12	14	4	39	43
Technology products								
% Total	25	40	22	10	1	1	32	65
% Prescription Shoppers	22	37	26	12	2	1	38	59
Beauty products								
% Total	32	37	16	8	5	2	23	69
% Prescription Shoppers	27	36	20	9	7	2	28	62

**Message Testing**

13. Listed below are some arguments you might hear as reasons for NOT purchasing prescription medications online from questionable sources. Please indicate how convincing each statement is as a reason NOT to purchase prescription medications online from questionable sources.

						Collapsed	
	Not at all convincing	Not very convincing	Somewhat convincing	Very convincing	Don't know	Convincing	Not convincing
Illegal online drug sellers may sell you medicine that does not work or is dangerous to your health							
% Total	5	10	29	52	4	81	15
% Prescription Shoppers	9	16	32	38	6	69	25
Illegal online drug sellers source products from countries with lax regulations around pharmaceuticals, making those product unsafe							
% Total	5	11	31	49	5	80	15
% Prescription Shoppers	8	16	35	35	6	70	24
Illegal online drug sellers utilize malware, spam, and engage in identity theft							
% Total	5	13	33	45	5	78	18
% Prescription Shoppers	8	19	32	36	5	68	27
95 percent of online drug sellers are out of compliance with laws/regulations							
% Total	6	16	30	40	7	70	23
% Prescription Shoppers	9	23	28	32	8	60	32

**Informed Ballot Measures**

*Sometimes during surveys such as this, people change their mind after hearing new information, and sometimes their opinions stay the same. So I'd like to ask you again...*

14. How likely are you to purchase any type of prescription medication online in the future?

% Total		% Prescription Shoppers		
Initial	Informed	Initial	Informed	
25	17	69	50	Very likely
31	24	24	33	Somewhat likely
18	28	4	12	Not very likely
21	27	1	3	Not at all likely
6	4	2	2	Don't know
<b>Collapsed</b>				
56	41	93	83	Likely
39	55	5	14	Not likely

**Information Sources**

15. Which of the following places or online tools would you use to look for more information about buying prescription medications online in the future? Select all that apply.

% Total	% Prescription Shoppers	
60	51	Traditional pharmacy websites such as CVS or Walgreens
54	59	Health insurance company websites
54	41	U.S. government websites such as the Food & Drug Administration website
28	26	Search engines such as Google or Yahoo!
12	14	Websites ending in the .pharmacy domain
5	5	Social media channels such as Facebook and Twitter
3	4	Other (specify)
6	3	Don't know

**Credibility Test**

16. How much do you trust each of the following as a source for information about online pharmacies?

	Collapsed							
	Not at all	Not very much	Some	Great deal	Don't know	Trust	Do not trust	
Your doctor, nurse, pharmacist, or other healthcare professional								
% Total	1	2	22	74	1	96	4	
% Prescription Shoppers	2	3	20	75	-	95	5	
Health insurance companies								
% Total	4	12	44	39	1	83	16	
% Prescription Shoppers	3	9	37	51	*	88	12	
Healthcare companies								
% Total	4	12	51	31	1	82	16	
% Prescription Shoppers	3	10	46	40	*	86	14	
Friend or family member								
% Total	3	16	51	27	2	79	20	
% Prescription Shoppers	4	14	52	28	1	80	18	
U.S. federal government								
% Total	8	14	43	33	1	76	22	
% Prescription Shoppers	6	15	41	35	2	77	21	
Non-profit organizations								
% Total	7	21	51	12	8	64	29	
% Prescription Shoppers	9	15	53	17	6	70	24	
Online search engines								
% Total	14	32	43	9	2	52	46	
% Prescription Shoppers	13	23	50	13	2	62	36	
News media								
% Total	15	35	41	8	2	49	49	
% Prescription Shoppers	13	33	42	9	3	52	45	



## Initial Screening Questions

S1. Are you...

% Total	% Prescription Shoppers	
40	46	Male
60	54	Female

S2. What is your approximate age?

% Total	% Prescription Shoppers	
-	-	Under 18 years [THANK AND TERMINATE]
6	4	18-24 years
9	8	25-29 years
12	9	30-34 years
10	9	35-39 years
8	6	40-44 years
9	7	45-49 years
8	7	50-54 years
10	11	55-59 years
10	10	60-64 years
16	23	65-74 years
3	5	75 or over

S3. Have you purchased goods or services online (via the internet or a mobile application) within the past 12 months?

% Total	% Prescription Shoppers	
100	100	Yes
-	-	No [THANK AND TERMINATE]
-	-	Don't know [THANK AND TERMINATE]

## Demographic Questions

D1. What is the last grade of school you completed?

% Total	% Prescription Shoppers	
1	*	Some high school [GRADE 9-11]
16	14	Graduated high school [GRADE 12]
6	5	Vocational school/Technical school
15	12	Some college - 2 years or less
8	7	Some college - more than two years
33	37	Graduated college
19	25	Post-graduate degree [e.g. MA, MBA, LL.D, PhD]
-	-	Don't know
		<b><u>Collapsed</u></b>
24	19	High school or less
24	18	Some college
53	62	College grad +

D2. Which of the following income groups includes your COMBINED HOUSEHOLD INCOME last year before taxes?

% Total	% Prescription Shoppers	
31	20	Up to \$50,000
21	21	\$50,000 - \$75,000
18	20	\$75,000 - \$100,000
11	11	\$100,000 - \$125,000
7	9	\$125,000 - \$150,000
8	14	\$150,000 and over
4	3	Don't know
		<b><u>Collapsed</u></b>
31	20	Under \$50,000
39	41	\$50-\$100,000
27	35	\$100,000 or more

D3. Are you of Hispanic, Latino or Spanish origin?

% Total	% Prescription Shoppers	
93	91	No, not of Hispanic, Latino or Spanish origin
3	5	Yes, Mexican, Mexican American, Chicano
2	3	Yes, Puerto Rican
*	-	Yes, Cuban
1	1	Yes, another Hispanic, Latino or Spanish origin

D4. What is your race?

% Total	% Prescription Shoppers	
85	86	White
6	6	Black, African American
2	1	American Indian or Alaska Native
6	5	Asian
-	-	Native Hawaiian/Other Pacific Islander
2	3	Other

D5. Which of the following best describes your current employment status?

% Total	% Prescription Shoppers	
44	42	Employed full-time
10	10	Employed part-time
10	5	Staying at home with children
3	2	Student
26	36	Retired
7	4	Unemployed
		<b><u>Collapsed</u></b>
54	53	Employed
39	43	Stay at home parent/student/retired
7	4	Unemployed

D6. Which of the following types of health insurance, if any, do you have? Select all that apply.

% Total	% Prescription Shoppers	
52	53	Plan provided through an employer
13	15	A plan you purchased on your own
26	33	Medicare
9	5	Medicaid
1	*	MAP card (Medical Assistance Program)
7	6	Other government plan
6	3	I do not have insurance at this time

**IF D6=1-6, ASK D7; IF D6=7, SKIP TO D8**

D7. Does your health insurance include coverage for prescription drugs?

% Total (n=757)	% Prescription Shoppers (n=215)	
92	92	Yes
6	7	No
2	1	Don't know

D8. Please select which of the following best describes your position in politics today?

% Total	% Prescription Shoppers	
14	17	Strong Republican
10	10	Not-so-strong Republican
11	11	Independent lean Republican
18	18	Independent
10	11	Independent lean Democrat
11	10	Not-so-strong Democrat
13	14	Strong Democrat
3	2	Other (Please specify)
10	7	Don't know
		<b><u>Collapsed</u></b>
24	27	Republican
24	25	Democrat
39	39	Independent