

UNLOCKING THE BENEFITS OF ONLINE ACCESS TO PRESCRIPTION MEDICINES ACROSS THE EU



- We compare the pharmacy experiences of European Union citizens in countries where online access to prescription medicines is permitted (Sweden and Germany) to those in countries where it is prohibited (France, Italy, and Spain)
- We gather evidence through a consumer survey (5,000 participants) supported by 25 in-depth interviews with chronic patients, 25 with pharmacy owners, and 3 with experts affiliated with patients' organisations

SIGNIFICANT DEMAND for online access to prescription medicines



31%

of the respondents in countries with prohibited online access would like to obtain prescription medicines online



56%

of respondents in Sweden already use this service

BENEFITS OF ONLINE ACCESS

CONVENIENCE

flexible ordering and avoiding pharmacy visits



between 69% and 84%

of respondents value ordering at any time



between 67% and 80%

of respondents value access to a delivery service



15 minutes

estimated average time saved per transaction



up to EUR 1.3bn in the short term and up to EUR 2.3bn in the long term in convenience benefits from the EU-wide removal of restrictions

IMPROVED HEALTH OF CHRONIC PATIENTS

due to increased medication adherence



Respondents attribute non-adherence to unavailable medicine, forgetting refills, and time constraints



64%

of chronic patients experiencing time constraints believe online access would improve adherence

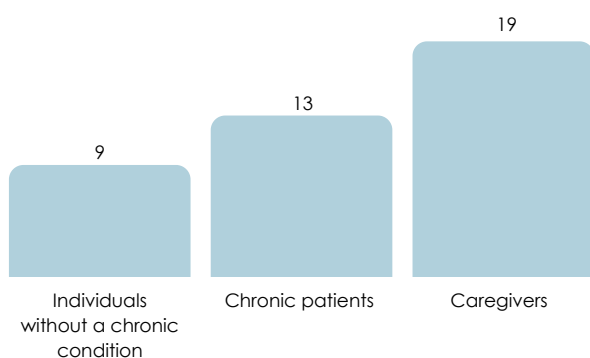


57%

of respondents who used online dispensing believe that online access helps to improve their adherence

MAIN BENEFICIARIES

■ Number of annual pharmacy visits



Demand for online access to prescription medicines comes from those most burdened by having to go to the pharmacy:



Chronic patients and their caregivers



Those who perceive pharmacy opening hours as inconvenient



Those with longer-than-average travel times to pharmacies

LACK OF EXPERIENCE AND AWARENESS

inhibit patients from using online pharmacies



75%

of respondents in countries with prohibited online access are unaware of the mandatory EU common logo, designed to identify authorised online pharmacies

INCREASED USE AND INFORMATION

enhances patients' confidence in digital pharmacy services



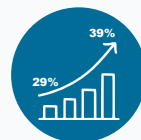
Reduced concern

Concerns about safety issues and delivery are significantly lower in countries with online access



53%

of respondents are not aware that online pharmacies use the same safe and secure supply as physical pharmacies



Increased willingness to use online channels

Informing respondents about the EU common logo and that the regulatory framework is the same as for physical pharmacies increases confidence in online dispensing of prescription medicines

OFFERING ONLINE SERVICES



Financial incentives

Prescription medicines are an important part of pharmacy turnover for both physical and online operations



Lack of skills

Lack of technology and marketing skills, as well as difficulties in managing delivery logistics



6 out of 9

Pharmacy owners in France, Italy and Spain would use online services if restrictions on online access to prescription medicines were lifted

INCENTIVES

BARRIERS

RECOMMENDATIONS

1

ENHANCE MEDICINE AVAILABILITY ONLINE

Encourage EU regulators to take the necessary steps towards allowing online access to prescription medicines by amending Article 85(c) in the Community Code of Medicinal Products for Human Use, which regulates the sale of medicinal products at a distance to the public; and encourage EU Member States to provide for regulated options in national laws

2

BOOST MEDICINE ACCESSIBILITY ONLINE

Increase awareness of secure supply-chain safeguards for pharmacies operating online to enhance trust and prevent the risks associated with the use of unauthorised sites and falsified medicines

3

FACILITATE THE DIGITAL EXPANSION OF PHARMACY OPERATIONS

Enable online access to incentivise more pharmacies in more EU Member States to adopt omnichannel strategies, meeting patient demands and improving healthcare outcomes