

EUROPEANS AND COUNTERFEIT MEDICINES

OPINION SURVEY
HAPPYCURIOUS FOR SANOFI

When it comes to counterfeit drugs, europeans know little and trust even less

Survey conducted by happycurious for SANOFI* on a representative sample (gender, age, region) of 5010 Europeans (self-administered, data collected online), April 7-17, 2014

Sample by country

France: 1002 individuals

United Kingdom: 1001 individuals

Germany: 1001 individuals

Italy: 1004 individuals

Spain: 1002 individuals

Sample by age

18-24 years old - 14 %

25-34 years old - 16 %

35-44 years old - 18 %

45-54 years old - 17 %

55-64 years old - 14 %

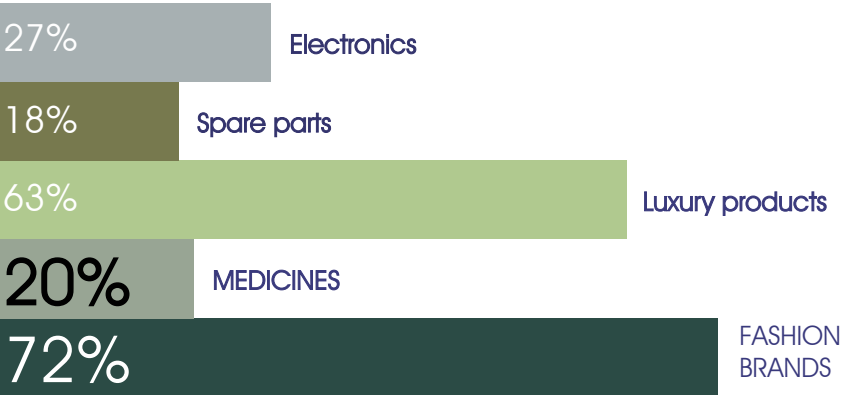
Above 65 - 20 %

* happycurious is a consultancy specialised in social intelligence : its field of expertise is the understanding of social shifts, on the basis of qualitative and quantitative methodology.

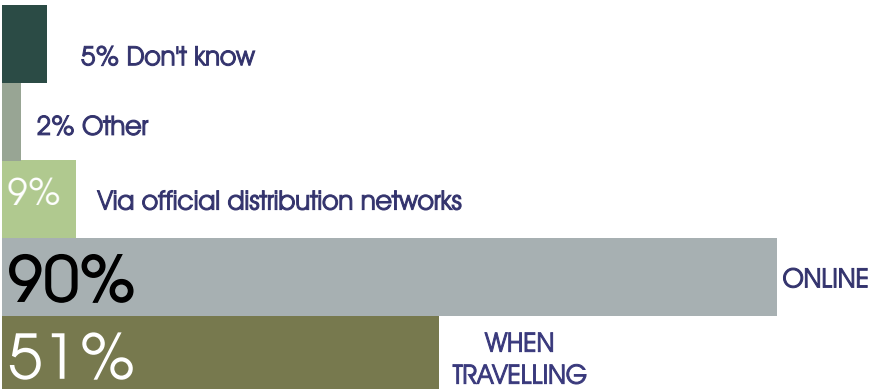
EUROPE FINDINGS

AWARENESS OF COUNTERFEIT DRUGS

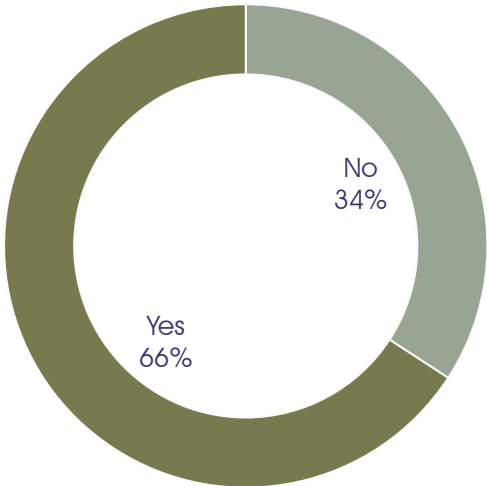
WHAT DO YOU INSTINCTIVELY THINK OF WHEN YOU HEAR THE WORD « COUNTERFEITING » ?



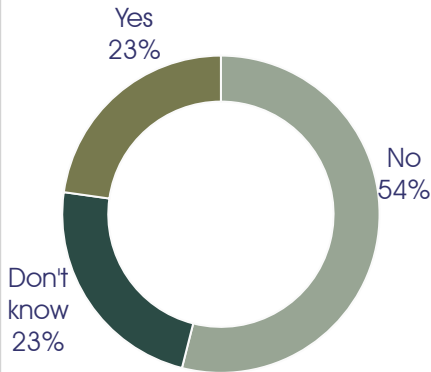
ACCORDING TO YOU, IN WHAT TYPES OF SITUATIONS CAN YOU ENCOUNTER COUNTERFEIT MEDICINES?



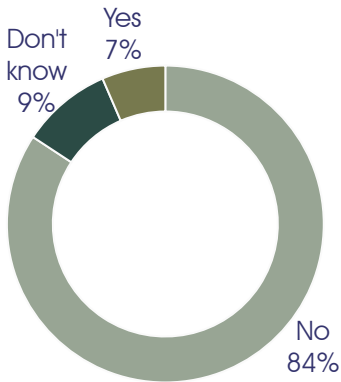
HAVE YOU EVER HEARD ABOUT MEDICINE COUNTERFEITING?



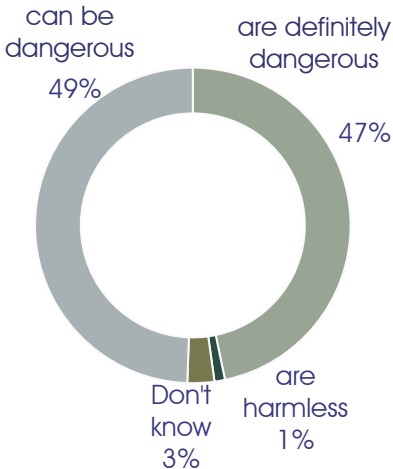
DO YOU FEEL YOU HAVE ENOUGH INFORMATION ABOUT COUNTERFEIT MEDICINES?



HAVE YOU EVER SEEN/IDENTIFIED FAKE MEDICINES ?



WOULD YOU SAY THAT COUNTERFEIT MEDICINES...



AWARENESS OF COUNTERFEIT DRUGS

Counterfeiting is primarily an issue for luxury goods and clothing brands

For Europeans, counterfeiting is generally associated with luxury goods and clothing brands.

Few associate the word with medications (20%).

While a majority of respondents (66%) have heard of counterfeit drugs, participants seem unclear about the issue: 77% say they are insufficiently informed or they are unfamiliar with the subject.

84% of those surveyed say they have never seen or identified a fake drug.

AWARENESS OF COUNTERFEIT DRUGS

A strong sense of danger tied to fake drugs

There is a consensus that fake drugs pose some sort of DANGER: **96% of Europeans surveyed think that fake medication may be or is definitely dangerous. A majority of the sample (54%) think they are insufficiently informed about the issue.**

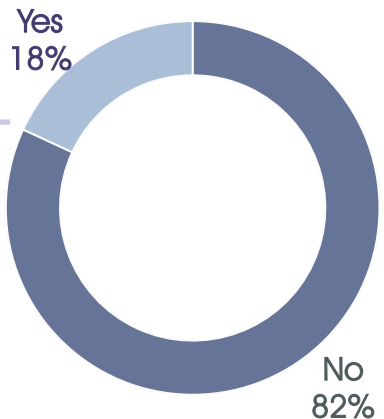
Europeans seem to lack the resources to understand the real risk.

INTERNET AND EXPOSURE TO COUNTERFEIT DRUGS

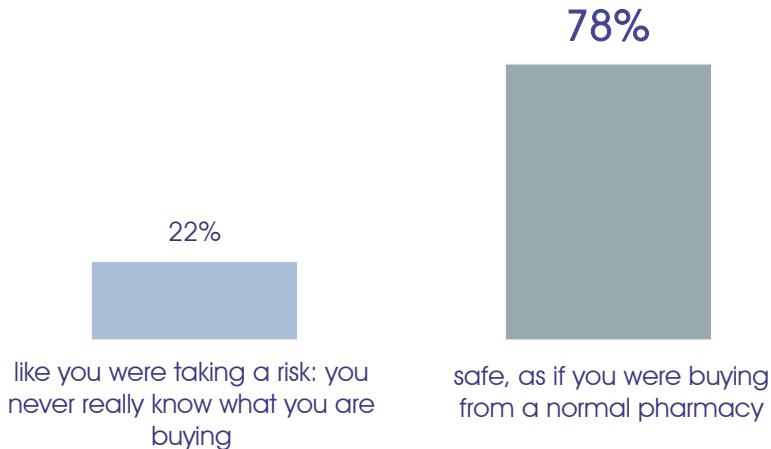
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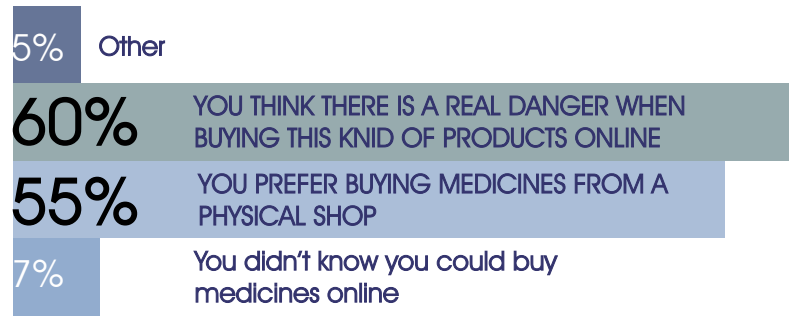
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WHEN YOU BOUGHT MEDICINES ONLINE, DID YOU FEEL...



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INTERNET AND EXPOSURE TO COUNTERFEIT DRUGS

Potential exposure to fake drugs: the #1 place is the internet

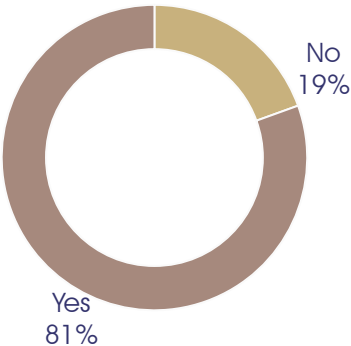
Buying drugs online is perceived to be the most dangerous, **with 90% of those surveyed citing the internet as the top potential source of counterfeit drugs.**

Only 18% of Europeans say they have bought medications online. Of that group, 78% felt they were purchasing in a safe, secure environment.

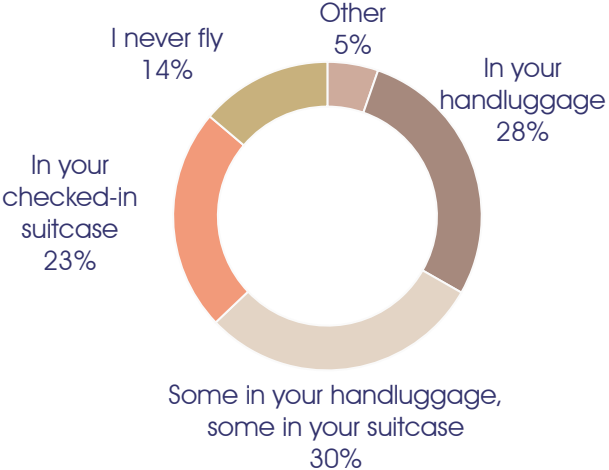
However, 60% of those who have never bought drugs online say it is because they feel there is a real danger in doing so. 55% of the total sample say they simply prefer brick-and-mortar shops.

TRAVEL AND EXPOSURE TO COUNTERFEIT DRUGS

WHEN PREPARING FOR A TRIP, DO YOU ALWAYS TAKE A FIRST AID KIT WITH YOU?



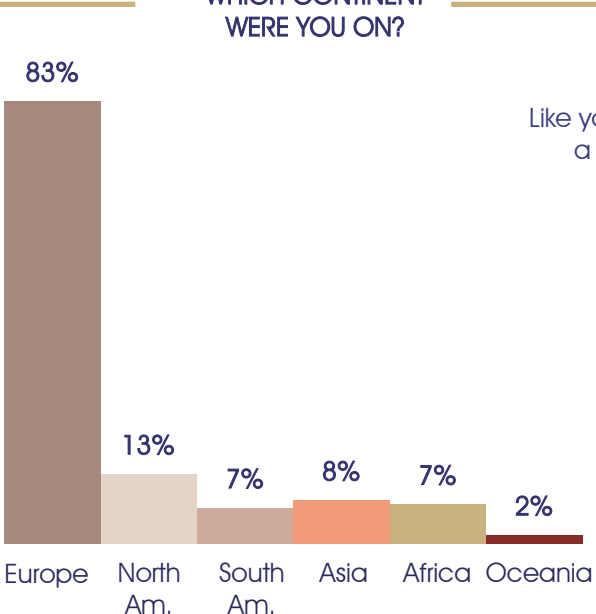
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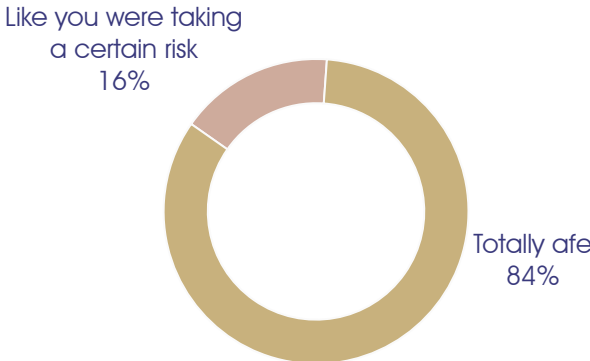
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WHICH CONTINENT WERE YOU ON?



WHEN YOU BOUGHT MEDICINES ON A TRIP, YOU WERE FEELING...



TRAVEL AND EXPOSURE TO COUNTERFEIT DRUGS

Travel: the #2 way to be exposed to fake drugs

51% of the total sample believe they could be exposed to fake drugs when traveling.

Europeans plan ahead: **81% say they travel with a first aid kit.**

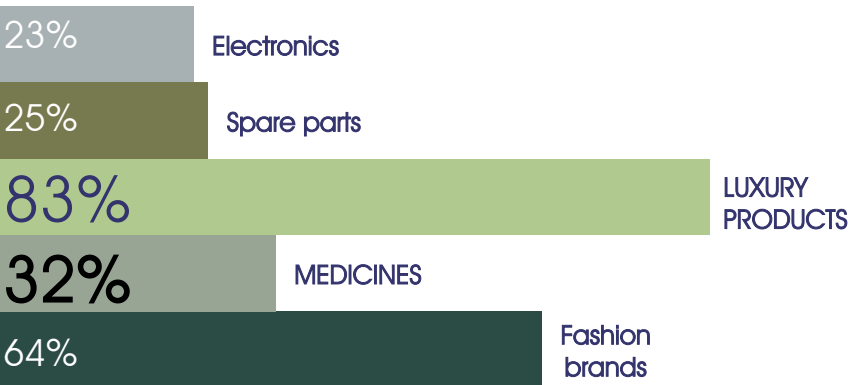
And when traveling by air, they pay special attention to how they organize their baggage: 30% divide their medication between their carry-on and their checked bags, while 28% bring their medication in their carry-on.

FRANCE FOCUS

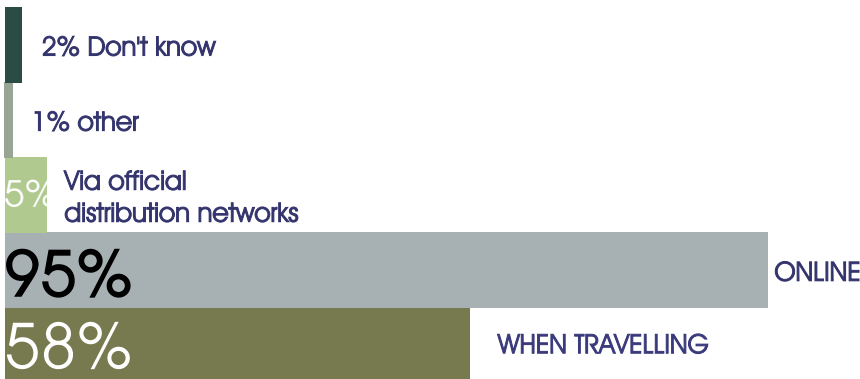
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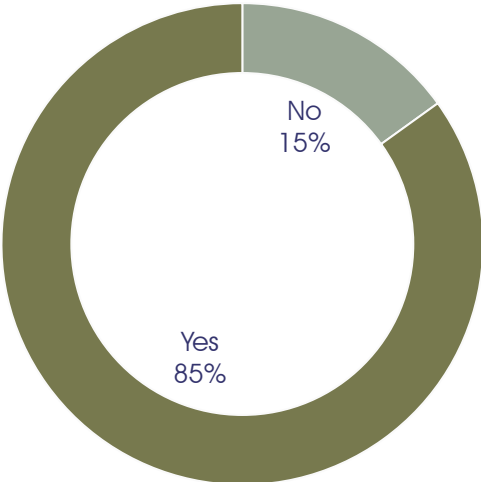
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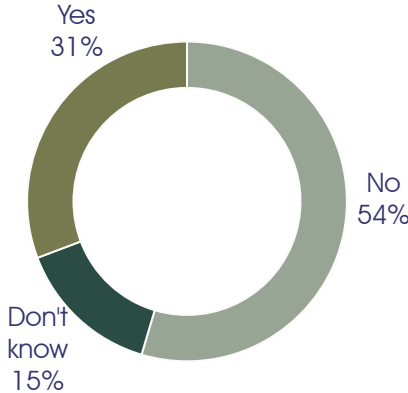
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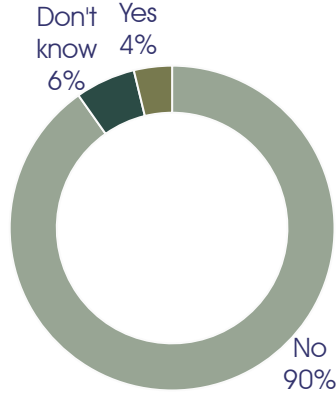
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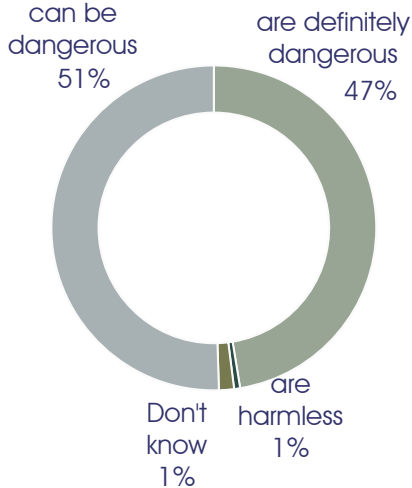
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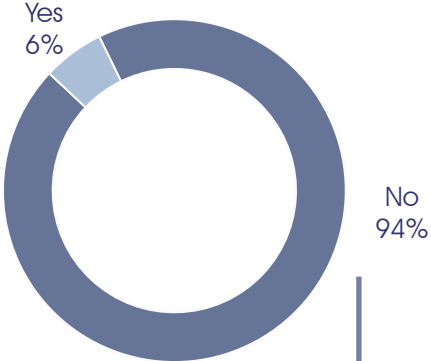


INTERNET AND EXPOSURE TO COUNTERFEIT DRUGS

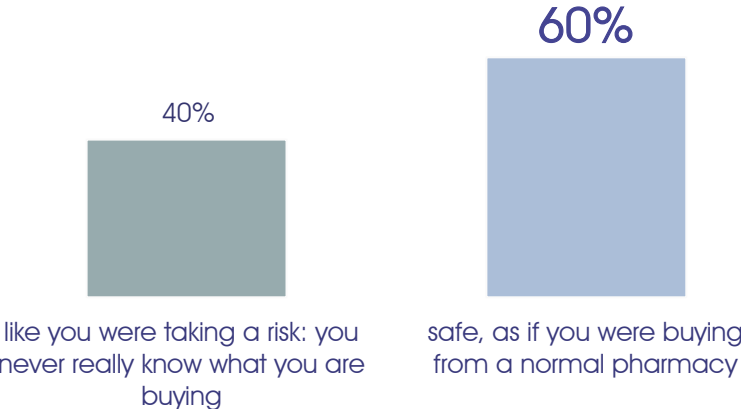
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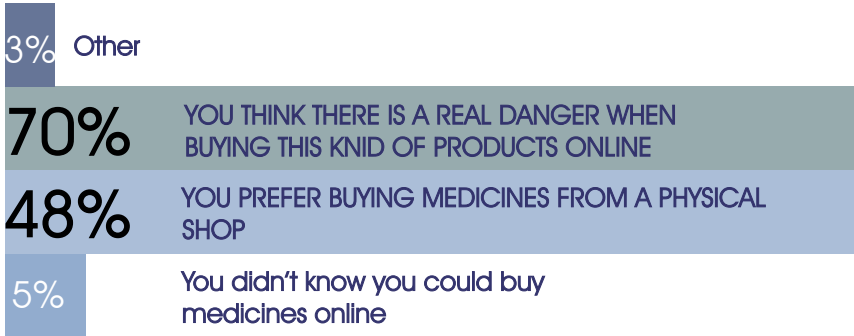
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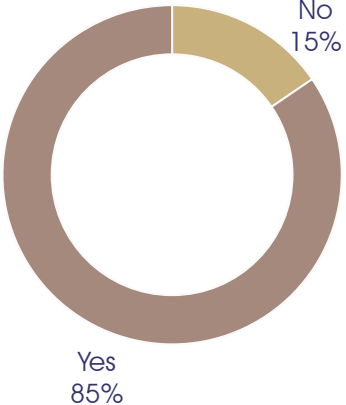


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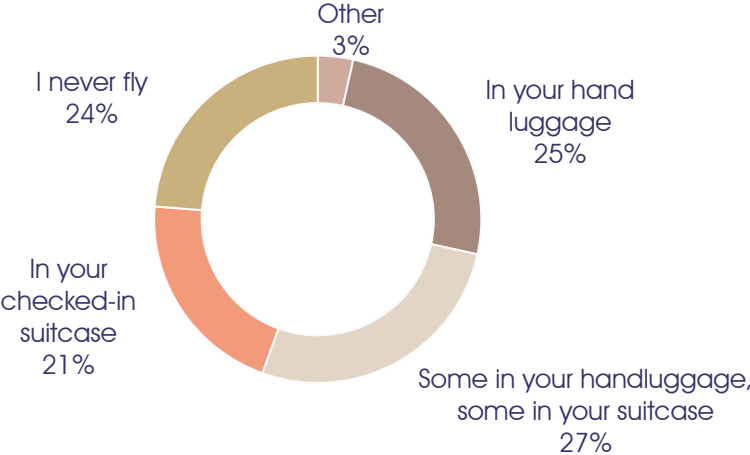


TRAVEL AND EXPOSURE TO COUNTERFEIT DRUGS

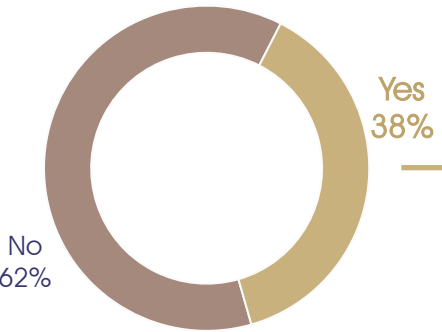
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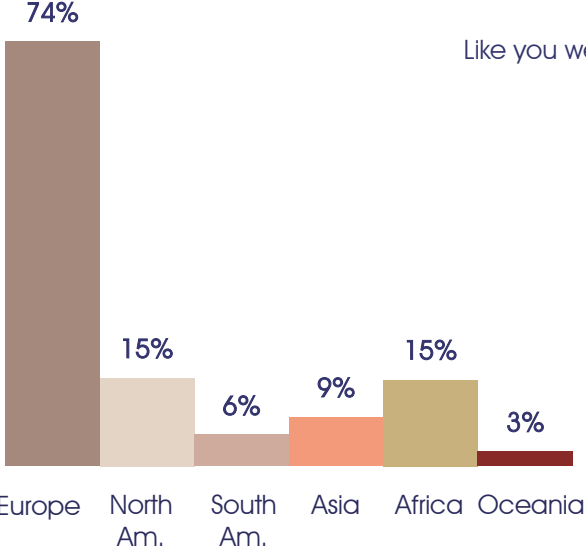
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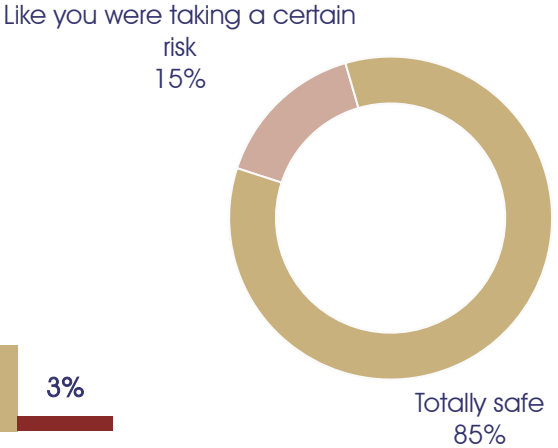
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FRANCE KEY FINDINGS

32% of French respondents associate drugs with counterfeiting, and 83% associate counterfeiting with luxury brands (vs. 63% for Europeans as a whole).

Counterfeit drugs seem to have higher visibility in France than in the other countries: 85% of French respondents say they have heard of them (vs. 66% for the total sample) and 31% consider themselves sufficiently informed (vs. 23%).

Buying drugs online is a rare activity: only 6% of French have purchased medications online (vs. 18% in Europe). 70% of those who have never done so believe there is a real danger in buying drugs on the internet (vs. 60% in Europe).

More French respondents than Europeans have never bought drugs while traveling (62% vs. 48% for Europeans).

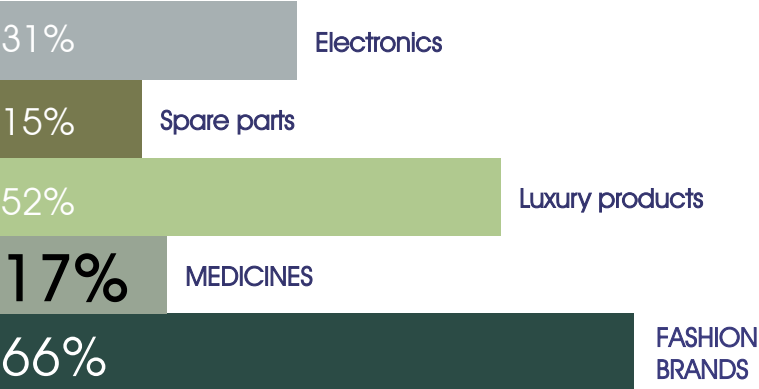
The French seem to have greater awareness of this topic than their fellow Europeans. While they are tempted by the prospect of saving money by shopping for drugs online, there is a real awareness of the danger, which holds them back. Finally, though they do not have a problem making purchases in other countries in Europe, the French prefer to buy their medication in their own country.

UNITED KINGDOM FOCUS

1001 individuals (49% men, 51 % women, aged 18+)

AWARENESS OF COUNTERFEIT DRUGS

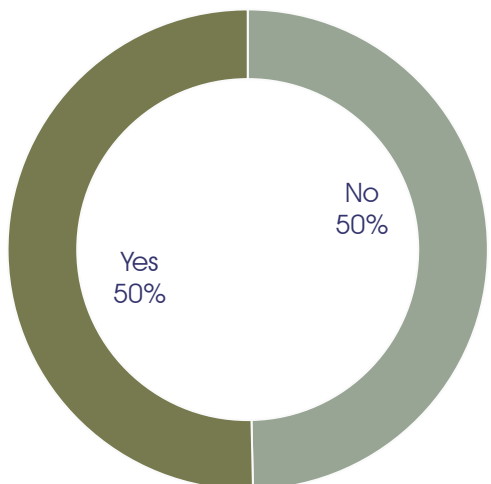
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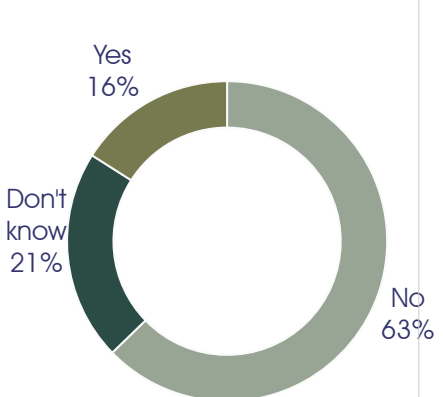
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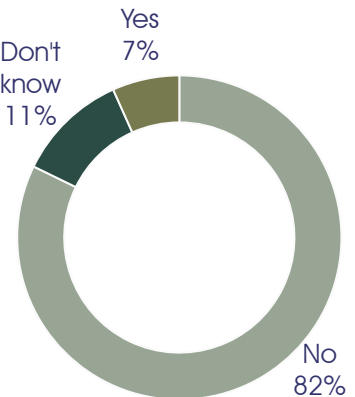
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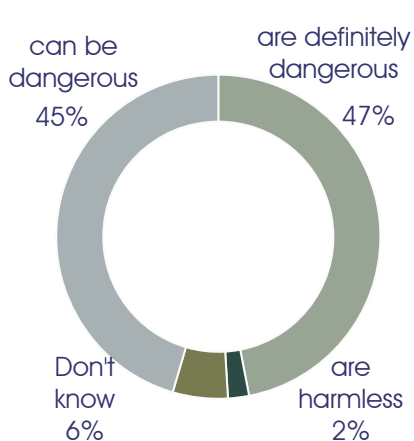
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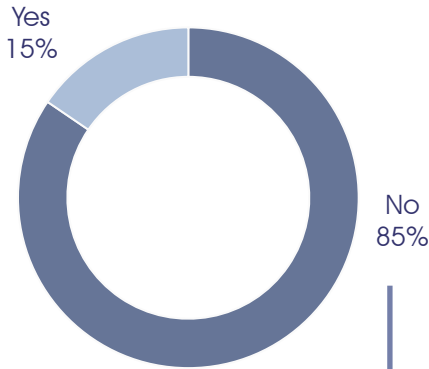


INTERNET AND EXPOSURE TO COUNTERFEIT DRUGS

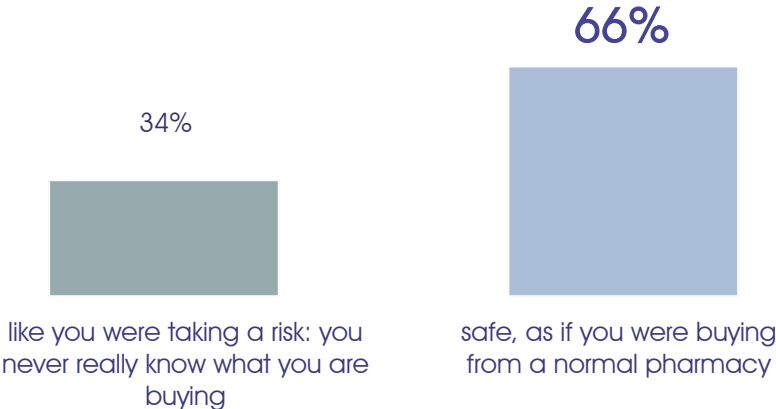
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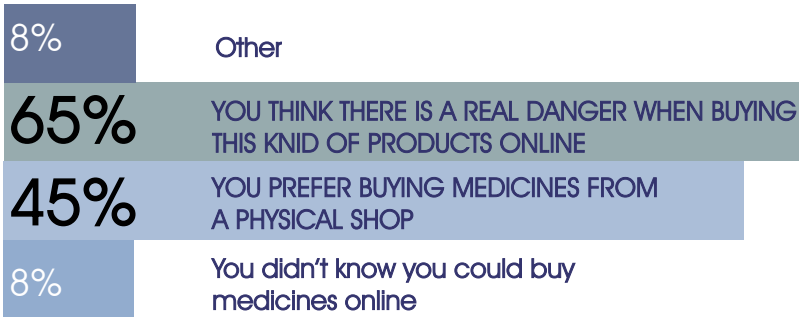
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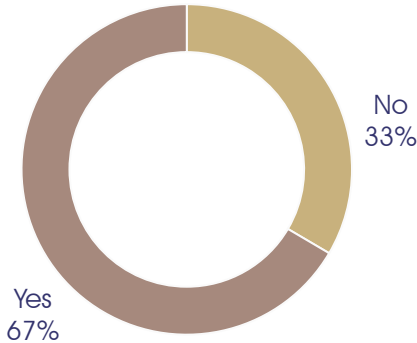


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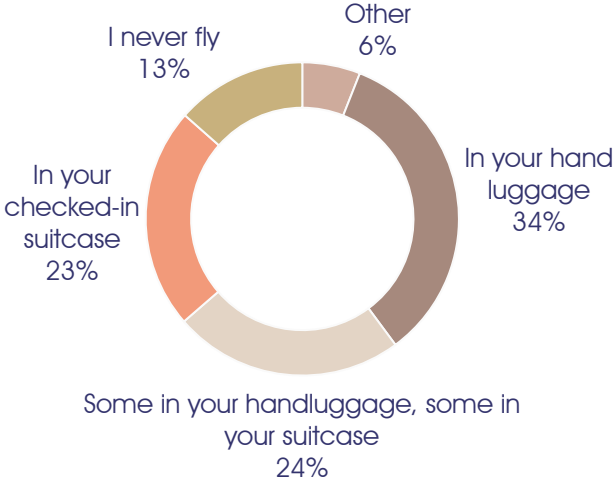


TRAVEL AND EXPOSURE TO COUNTERFEIT DRUGS

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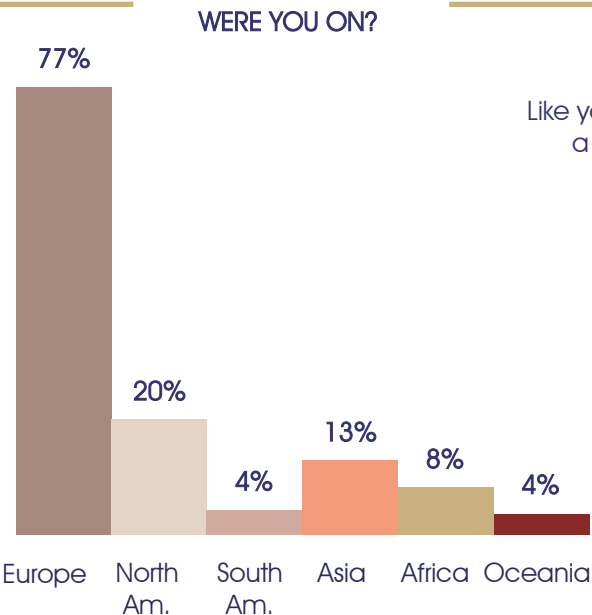
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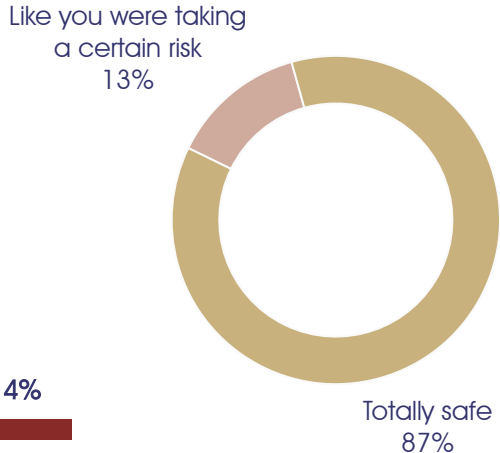
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UNITED KINGDOM KEY FINDINGS

The British do not immediately associate counterfeiting and drugs. They fall below the European average in terms of general awareness of the matter: 50% of the people surveyed had heard of counterfeit drugs (vs. 66% in Europe).

More British than Europeans as a whole think they are insufficiently informed (63% vs. 54%) and slightly fewer of them (92%) believe that a fake drug may be dangerous or even very dangerous.

82% of the British believe they have never been exposed to counterfeit drugs. **15% of the sample say they have bought drugs online (vs. 18% Europe-wide) and 65% see a real danger in buying medication on the internet.**

Half of the British sample say they have purchased medications while traveling and 67% bring a first aid kit with them (vs. 81% for the European average).

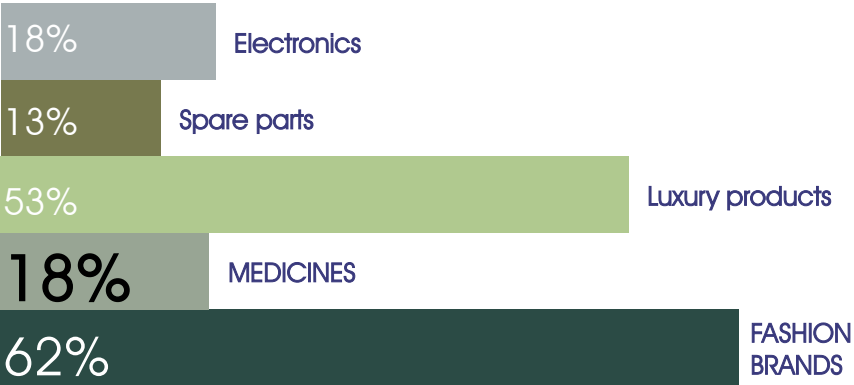
Although they express lower awareness of counterfeit drugs, the British seem to want to learn more because they have identified the danger and because they are more used to buying drugs when traveling.

GERMANY FOCUS

1001 individuals (49% men, 51 % women, aged 18+)

AWARENESS OF COUNTERFEIT DRUGS

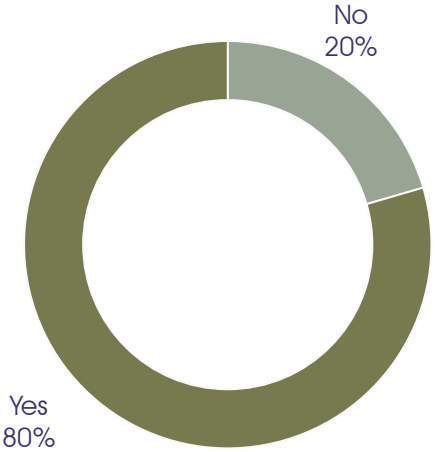
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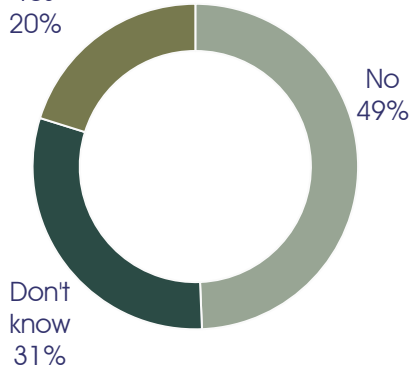
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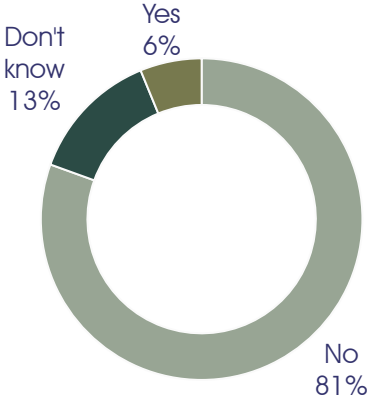
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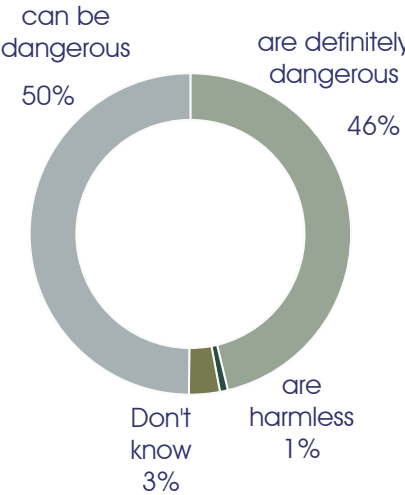
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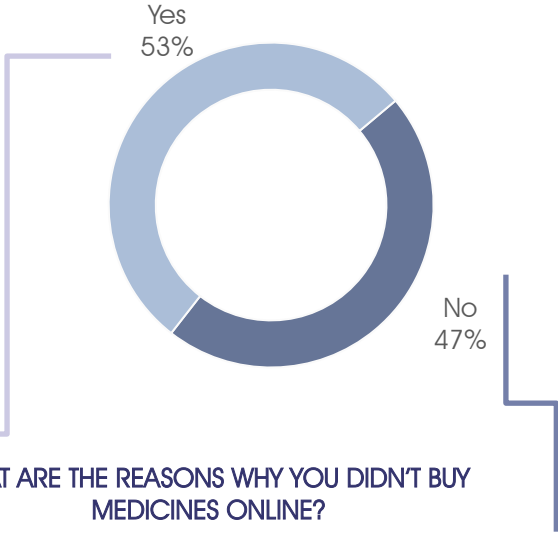


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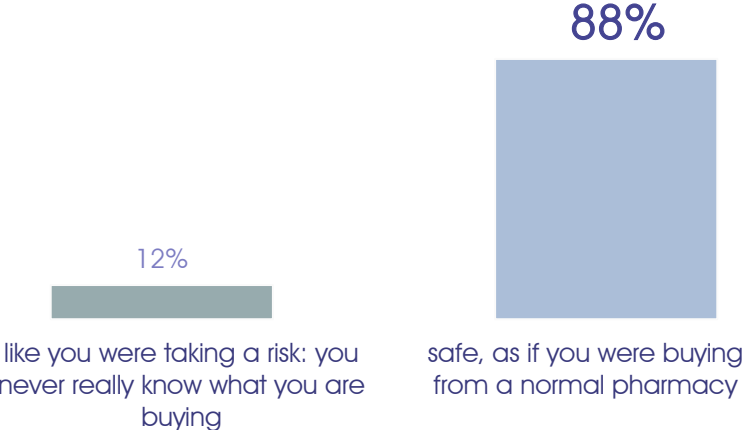
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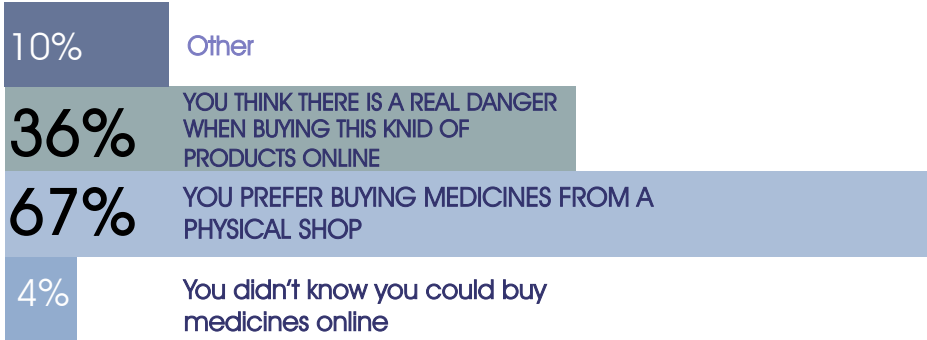
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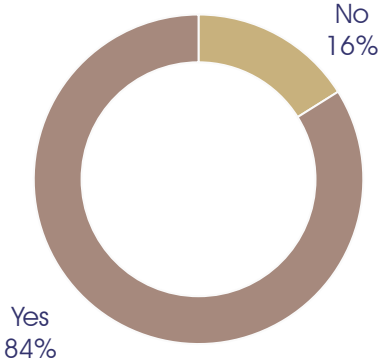


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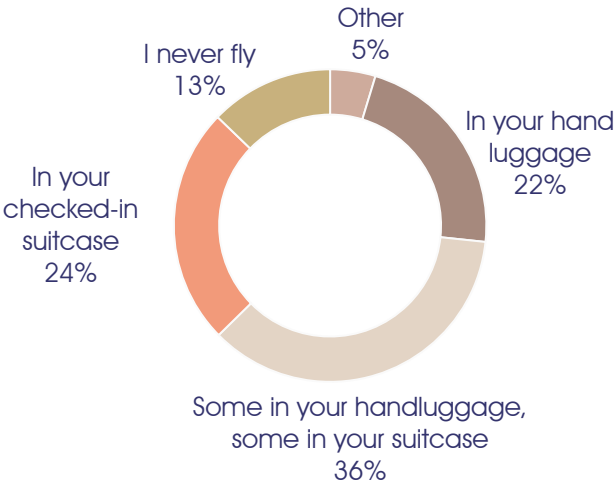


TRAVEL AND EXPOSURE TO COUNTERFEIT DRUGS

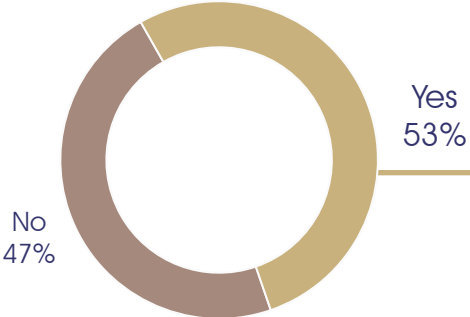
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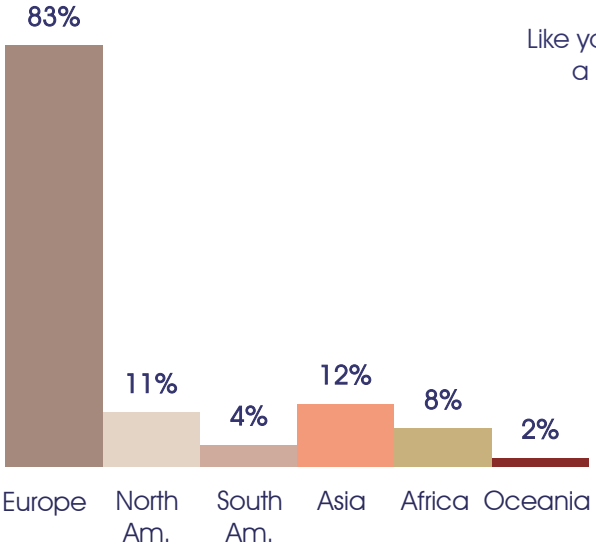
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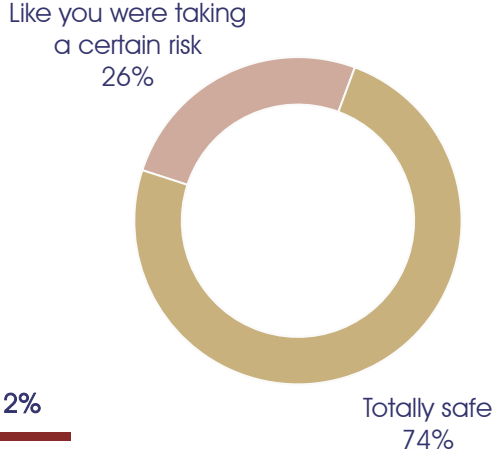
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GERMANY KEY FINDINGS

49% of Germans think they are insufficiently informed, which puts them slightly below the average for Europe. 18% associate drugs with counterfeiting (vs. 20%).

Germans are noticeably more aware of counterfeit medicine: 80% have heard of it (vs. the European average of 66%), which puts their awareness at a similar level to that of the French.

But what most distinguishes Germany from the other countries is Germans' habit of buying medication online: a clear majority (53%) say they have bought drugs on the internet (vs. 18% for the European average). 88% feel that buying online is safe and secure, exactly the same as in a regular pharmacy. Only 12% think they are taking a risk in doing so. In Germany, 85% of respondents purchase drugs on the internet in order to pay less.

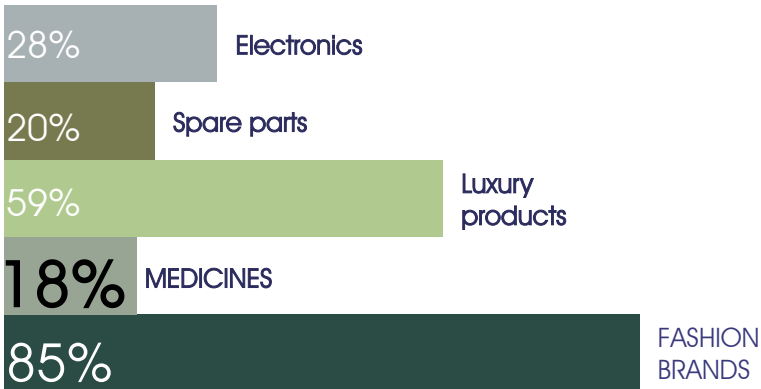
Slightly fewer Germans are in the habit of traveling with a first aid kit (84%) and a slight majority (53%) buy medicine when traveling. But 83% concentrate their drug purchases in the European region, about the same as the average for all respondents.

ITALY FOCUS

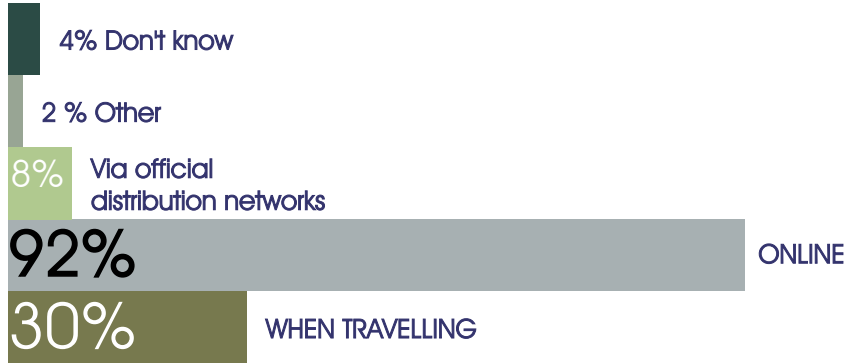
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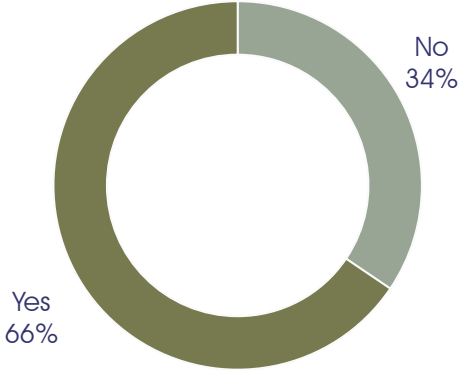
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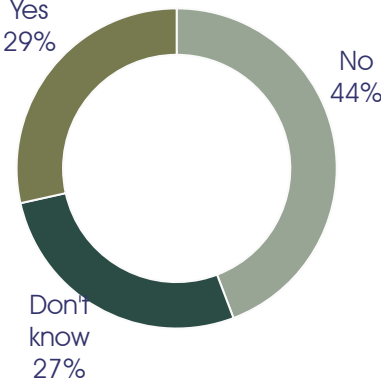
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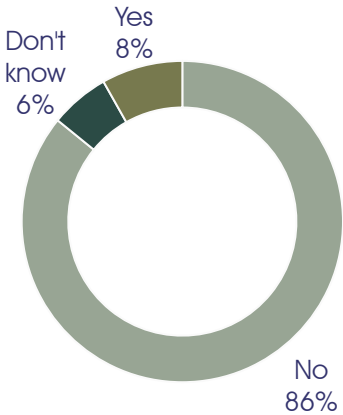
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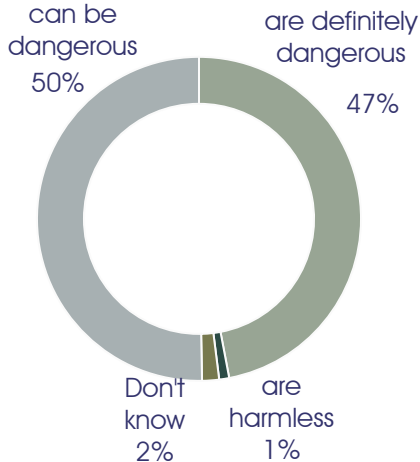
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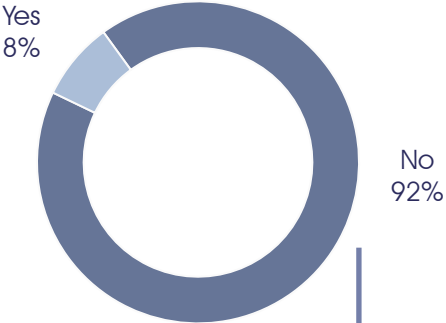


INTERNET AND EXPOSURE TO COUNTERFEIT DRUGS

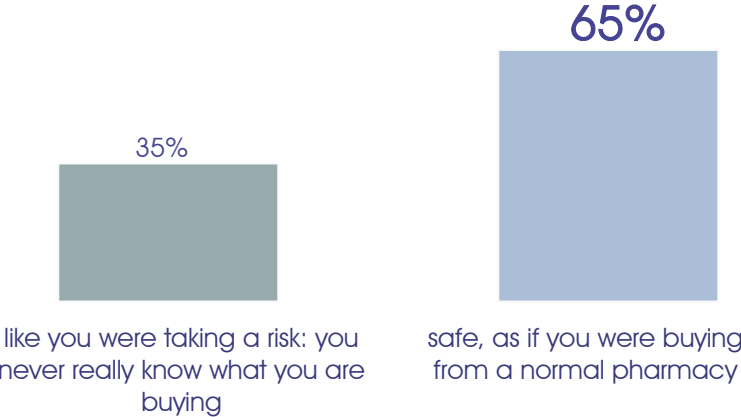
WHAT ARE THE REASONS THAT COULD LEAD YOU TO BUY MEDICINES ONLINE?



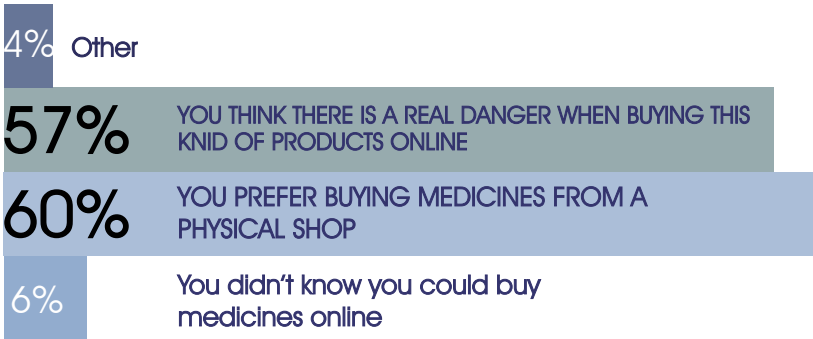
HAVE YOU EVER BOUGHT MEDICINES ONLINE?



WHEN YOU BOUGHT MEDICINES ONLINE, DID YOU FEEL...

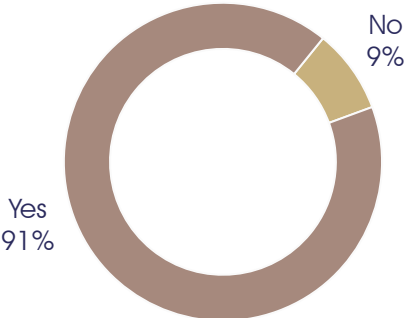


WHAT ARE THE REASONS WHY YOU DIDN'T BUY MEDICINES ONLINE?

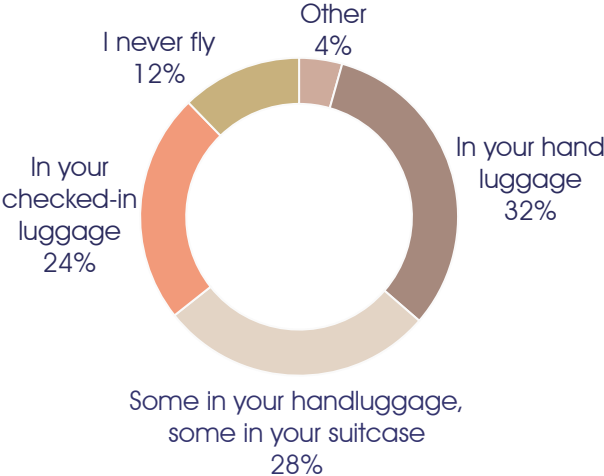


TRAVEL AND EXPOSURE TO COUNTERFEIT DRUGS

WHEN PREPARING FOR A TRIP, DO YOU ALWAYS TAKE A FIRST AID KIT WITH YOU?



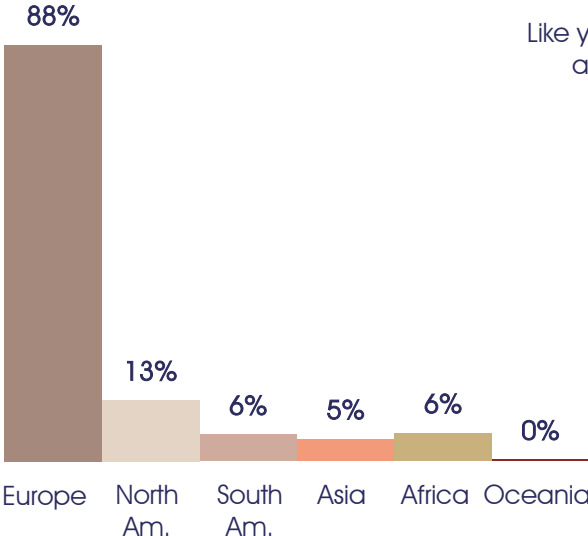
WHEN TRAVELLING BY PLANE, YOUR MEDICINES ARE...



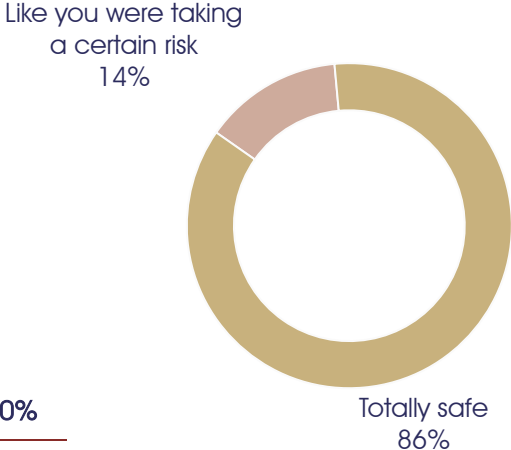
HAVE YOU EVER BOUGHT MEDICINES WHEN ON A TRIP ?



WHICH CONTINENT WERE YOU ON?



WHEN YOU BOUGHT MEDICINES ON A TRIP, YOU WERE FEELING...



ITALY KEY FINDINGS

Italians have an even stronger association between counterfeiting and clothing brands (85% vs. 72%).

Fewer Italians than Europeans as a whole think they are insufficiently informed about counterfeiting (44% vs. 54%).

Only 30% (vs. 51% for Europe) think they may be exposed to counterfeit drugs when traveling. On the other hand, 92% of them think that the internet is the leading source of exposure and circulation of fake drugs, which is the European average. **Only 8% of Italians say they have bought medicine online** (vs. 18% of Europeans). Of them, 35% felt they were taking a risk in doing so (vs. just 22% for the European average).

The primary motivation for buying drugs online is the ability to find medicines that are not available in Italy, and to a lesser extent access to lower prices.

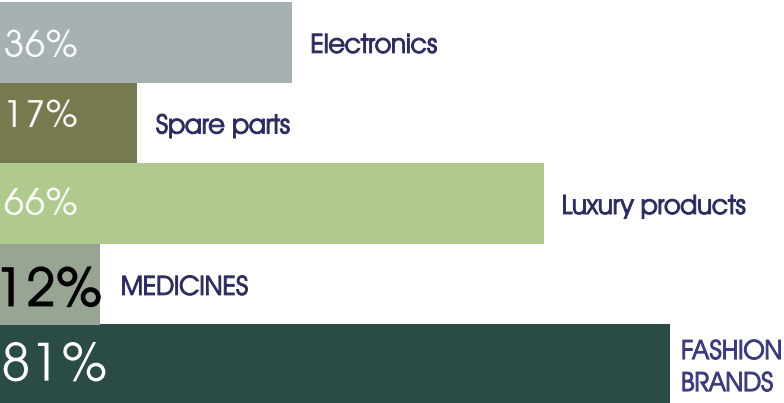
In short, Italians are better informed and more cautious in their online buying practices.

SPAIN FOCUS

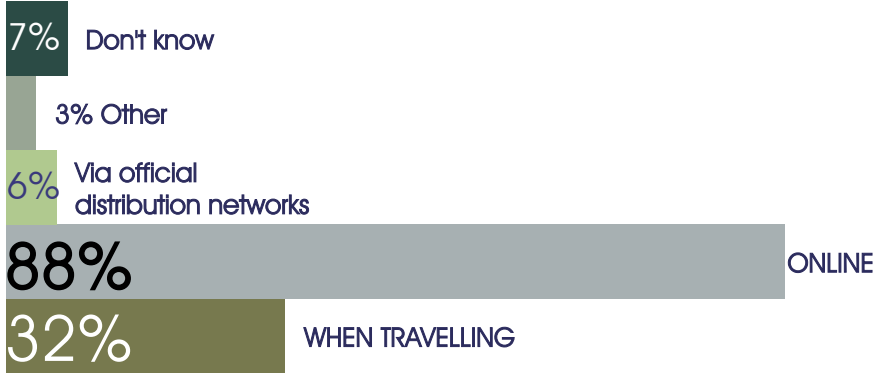
1002 individuals (50% men, 50 % women, aged 18+)

AWARENESS OF COUNTERFEIT DRUGS

WHAT DO YOU INSTINCTIVELY THINK OF WHEN YOU HEAR THE WORD « COUNTERFEITING » ?



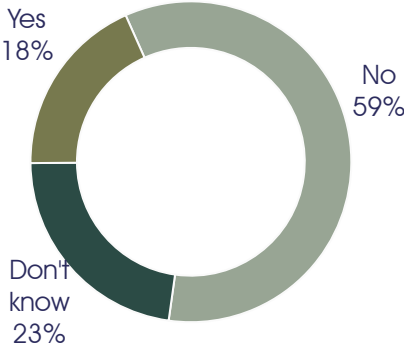
ACCORDING TO YOU, IN WHAT TYPES OF SITUATIONS CAN YOU ENCOUNTER COUNTERFEIT MEDICINES?



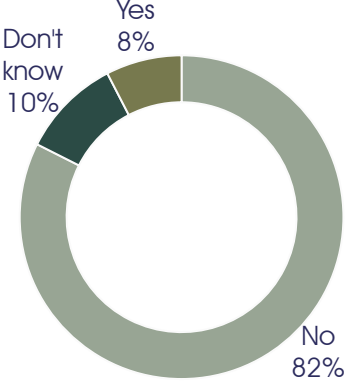
HAVE YOU EVER HEARD ABOUT MEDICINE COUNTERFEITING?



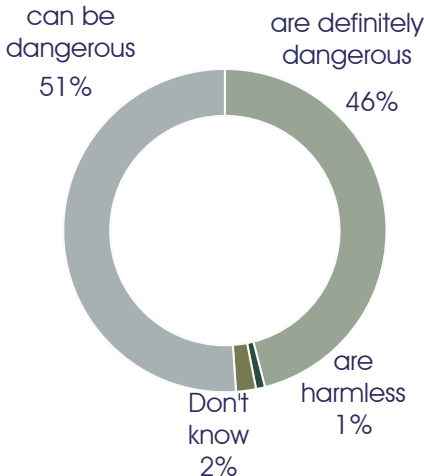
DO YOU FEEL YOU HAVE ENOUGH INFORMATION ABOUT COUNTERFEIT MEDICINES?



HAVE YOU EVER SEEN/IDENTIFIED FAKE MEDICINES ?



WOULD YOU SAY THAT COUNTERFEIT MEDICINES...

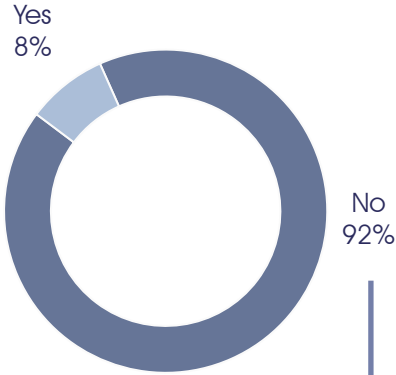


INTERNET AND EXPOSURE TO COUNTERFEIT DRUGS

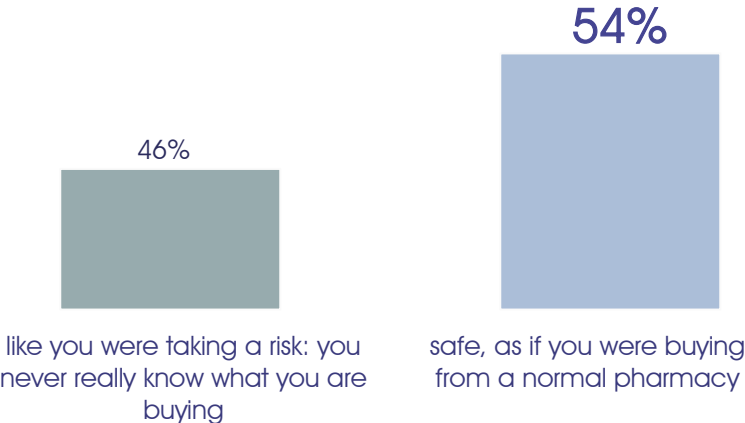
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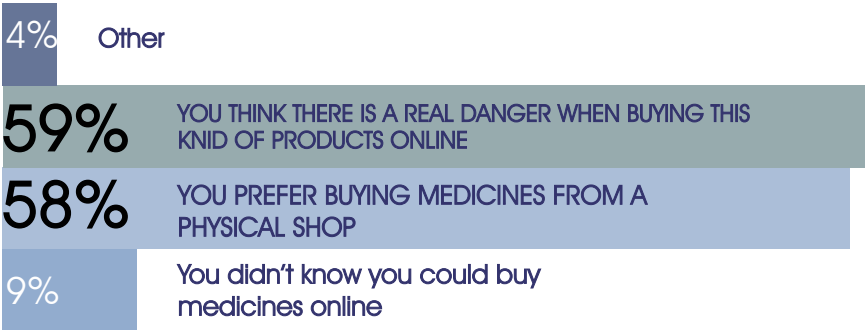
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WHEN YOU BOUGHT MEDICINES ONLINE, DID YOU FEEL...

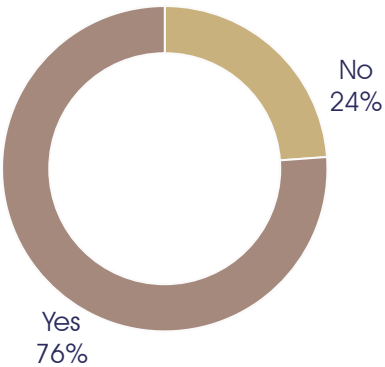


WHAT ARE THE REASONS WHY YOU DIDN'T BUY MEDICINES ONLINE?

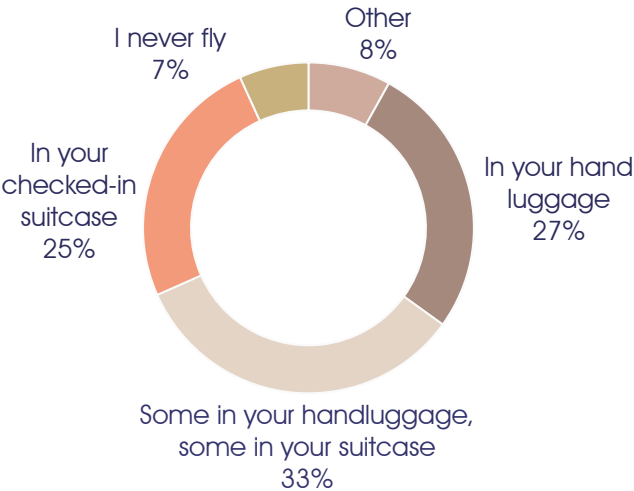


TRAVEL AND EXPOSURE TO COUNTERFEIT DRUGS

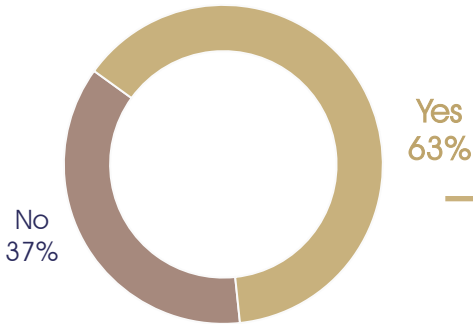
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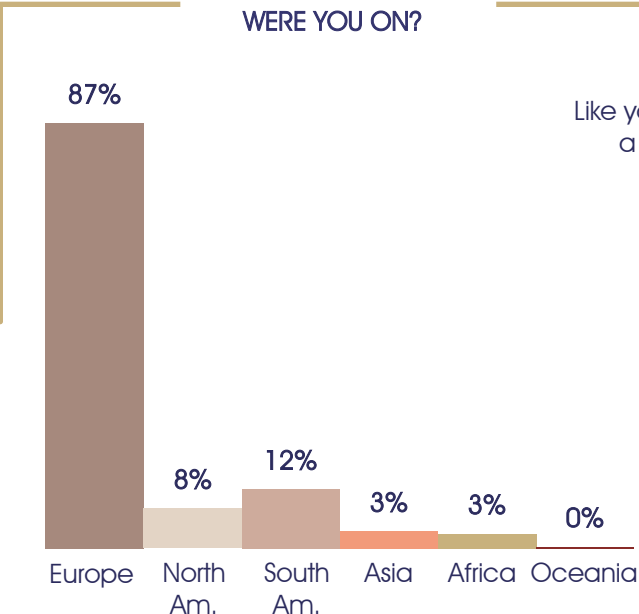
WHEN TRAVELLING BY PLANE, YOUR MEDICINES ARE...



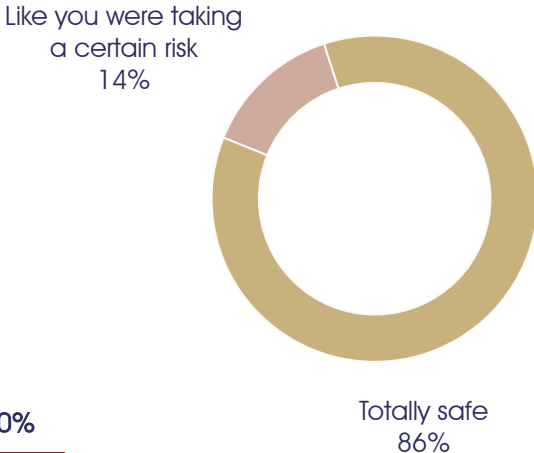
HAVE YOU EVER BOUGHT MEDICINES WHEN ON A TRIP ?



WHICH CONTINENT WERE YOU ON?



WHEN YOU BOUGHT MEDICINES ON A TRIP, YOU WERE FEELING...



SPAIN KEY FINDINGS

Like the Italians, Spaniards associate counterfeiting with clothing brands more often than Europeans as a whole (81% vs. 72%), and counterfeiting with drugs significantly less often (12% vs. 20%). **As one might expect from that figure, fewer of them have heard of counterfeit drugs than Europeans overall (49% vs. 66%).**

In another similarity with Italy, **only 8% have purchased medicine online**. Even more of them felt they were taking a bit of a risk in doing so (46%).

Slightly fewer Spanish respondents think to take their medicine with them when going on a trip (76% vs. 81%). It follows that more of them (63% vs. 52%) have purchased medicine abroad.

While the Spanish seem to behave in ways that expose them less to counterfeit drugs, in particular online, and while they are more suspicious of the safety of those drugs, they remain the least informed on the matter.

CONCLUSIONS

CONCLUSIONS

While the majority of Europeans have heard of counterfeit drugs, there is a broad range of realities underlying this figure:

- **France and Germany head up the countries with greater awareness**, while Spain appears to be less aware of the issue.
- **Europeans agree across the board on the question of danger:** the 5 countries surveyed all feel insufficiently informed and share the impression that counterfeit drugs pose a great risk. Respondents express a natural distrust of medication bought outside the traditional distribution channels.
- **The greatest differences are in the use of the internet to buy medication:** Germany stands alone as the one country where financial motivations have made shopping for medicine online commonplace. The UK also seems more inclined to purchase drugs online, though buyers remain cautious, whereas France, Spain and Italy are very hesitant to buy drugs online.

CONCLUSIONS

When it comes to traveling, however, some fairly strong cultural differences are revealed:

- for example between France and Spain. The French practice a form of protectionism—no doubt related to their strong culture of pharmaceuticals—and rarely buy drugs when traveling. The Spanish are noticeably more used to buying medication, and Latin America opens doors to a market they can access more easily for obvious language reasons.
- The UK, France and Italy primarily buy medication locally in Europe, although the British are also more willing to turn to another market that speaks the same language: North America.