Observatoire Sociétal du médicament (French Societal Drug Observatory)
2013

3rd survey wave conducted by Ipsos for Leem on the relationship that the French and doctors have with drugs

Press conference held on 28 March 2013
3rd wave of the observatoire sociétal du médicament which aims to:
- Review French confidence in drugs
- Determine the relationship that the French have with drugs
- Assess the image of businesses across all sectors, and that of drug companies in particular

...supplemented this year by a mirror survey of doctors
A two-part approach

General Public
1,002 people as a representative sample of the French population aged 18 years and over. The quota-sampling method was used: gender, age, occupation of head of household, household size, region and size of town.

Online interviewing through the Online Access Panel developed by Ipsos Interactive Services

Field dates: from 21 to 30 January 2013

Doctors
503 doctors as a representative sample of self-employed general practitioners. The quota-sampling method was used: gender, age, region and size of town

Telephone interviewing

Field dates: from 21 January to 11 February 2013
In 2011, the Mediator drug scandal was followed closely by the French. In February 2012, there was a critical report by the National Academy of Medicine on generic drugs. In July 2012, there was a national roll-out of the "tiers-payant contre générique" scheme to all insured patients, regardless of the health insurance scheme to which they belong. In May 2012, the Mediator drug trial began.

In September 2012, Debré and Even's book "The Guide to 4,000 Useful, Useless and Dangerous Medicines" was published. In December 2012/January 2013, there was controversy surrounding the 3rd and 4th generation pills. In January 2013, there was a launch by GEMME, the French Generic Medicines Association, of a three-week communications campaign on generic drugs.

In February 2013, Dr Even's book on cholesterol was published. The journal Prescrire published a list of drugs that should be withdrawn.

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And the widespread criticism levelled by the media that "matters have got out of hand", is shared by the French and by doctors

In France, **too many** drugs are consumed

There are **too many** different drugs to treat diseases

**Many** drugs are useless

Doctors prescribe **too many** drugs
Despite this context, confidence in drugs is strong and growing among the French and doctors alike.

French confidence in drugs is up 3 percentage points in a year.

For what reasons? What is this confidence based on? How is it explained?

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The key drivers of confidence in drugs

1. The patient: an active stakeholder with a mature relationship towards drugs
   - personal experience
   - knowledge
   - information

2. The patient's involvement reshapes the relationship with the doctor

3. The drug supply chain: the multiplicity of stakeholders provides assurance of their ability to regulate one another

4. A positive yet uncompromising view of companies

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The patient: an active stakeholder with a mature relationship towards drugs
A patient is now an active stakeholder with a mature relationship towards drugs.
An experience repeated time and again ...

43% of the French take medication every day*  

66% of the French take medication at least once a month*  

* Excluding the contraceptive pill

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92% believe that, by and large, the medicines they take are effective

92% have confidence in the medicines they take

... and highly satisfying
An efficacy spontaneously expressed

For what reasons do you have confidence in drugs? (Base: all)

- They are effective and give good results: 45% (+1)
- They are healing. They cured me: 26% (-1)
- They provide relief. They soothe pain: 19% (+1)

"Because they are effective"
The French who focus attention on the drug advances that have benefited them in practice

77% (+1) of the French believe that by and large in the past 20 years drugs have improved

More practical to administer: 69% (-3)
Better monitored: 59% (+8)
With better controlled side effects: 58% (-2)
More effective: 52% (-6)
More rapidly accessible: 51%
Riskier: 17% (-2)

Compared to 20 years ago drugs today are
A shared consciousness, a real maturity: Drugs are unlike other products

90% of the French think that drugs are active products posing some risks

- 93% of 50 year olds and over
- 84% of 18-24 year olds
Greater involvement that leads to information cross-checking, fact-checking and source-checking

64% (+3 points) believe that by and large their doctor provides them with sufficient information about the drugs prescribed to them.

68% find that in general their pharmacist provides them with sufficient information about the drugs dispensed to them.

64% report that besides the information provided by their doctor or pharmacist, they look for additional information on the medication they are taking.

48% on the information leaflet

46% on the Internet
Thus, the French take medication, and recognise the virtues, claim that they are aware of the risks inform themselves and cross-reference the sources.

And the French measure **in practice** and **in person** the positive results of the medication.
The patient's involvement reshapes the relationship with the doctor
Convergence of patient and doctor perceptions and opinions: the risks associated with drugs

Here now are some sentences. For each, please state whether it matches what you think completely, somewhat, not very much or not all.

Drugs are active products that pose some risks

- 90% (=)
- 100%

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Convergence of patient and doctor perceptions and opinions on generic drugs

Here now are some sentences. For each, please state whether it matches what you think completely, somewhat, not very much or not all.

- **65%**
  - The use of generic drugs helps reduce the social security deficit

- **54%**
  - There is no difference in efficacy between a drug and its generic equivalent

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Patient-doctor: a "couple" in dialogue with each other

At the doctor's, do you ... 

... talk about what you have read on the Internet (about your symptoms, your illness...)?

51%

Do some patients ... 

... talk to you about what they have read on the Internet (about their symptoms, their illness...)?

100%
Patient-doctor: from dialogue to a clearly stated request

At the doctor's, do you ...  
...ask for a particular drug to be prescribed to you?  
62%

Do some patients ...  
...ask you to prescribe them a particular drug?  
96%

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Patient-doctor: to the point where the doctor is challenged by some patients

At the doctor's, do you...

...show your disagreement because you are not prescribed what you want?

25%

...compare the diagnosis with what was found on the Internet?

20%

Do some patients...

...show their disagreement because you do not prescribe them what they want?

93%

...compare your diagnosis with what they found on the Internet?

93%
The drug supply chain
Aside from personal aspects, the words "products", "prescribed", "tested" and "monitored" are key to confidence.

For what reasons do you have confidence in drugs? Base: all

- Because they are produced and prescribed by skilled professionals
- Because they are tested and monitored

55%

78%
The French and their doctors are overwhelmingly confident in drugs that are endorsed (medically, publicly, by a brand name)

For each of the following types of drugs, are you completely confident, somewhat confident, not very confident or not at all confident?

<table>
<thead>
<tr>
<th>Type of Drugs</th>
<th>Doctor's Endorsement</th>
<th>Public Endorsement</th>
<th>Brand Commitment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prescription drugs</td>
<td>93% (±2)</td>
<td>92% (±2)</td>
<td>88% (±2)</td>
</tr>
<tr>
<td>Refundable drugs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brand-name drugs</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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And when one of these elements is absent, confidence is lower.

And the difference between drug types is even stronger among doctors.

<table>
<thead>
<tr>
<th>Drug Type</th>
<th>Confidence Level</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>No endorsement by the doctor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-prescription drugs</td>
<td>66% (-4)</td>
<td></td>
</tr>
<tr>
<td>Non-refundable drugs</td>
<td>74% (-3)</td>
<td></td>
</tr>
<tr>
<td>Generic drugs</td>
<td>70% (-8)</td>
<td></td>
</tr>
<tr>
<td>No public endorsement</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-prescription drugs</td>
<td>41%</td>
<td></td>
</tr>
<tr>
<td>Non-refundable drugs</td>
<td>56%</td>
<td></td>
</tr>
<tr>
<td>No brand commitment</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Generic drugs</td>
<td>67%</td>
<td></td>
</tr>
</tbody>
</table>

For each of the following types of drugs, are you completely confident, somewhat confident, not very confident or not at all confident?
For self-medication, the French need reassurance from pharmacists

69% seek advice from their pharmacist when choosing their medication (only 49% do so "out of habit")

22% of the French purchase non-prescription medicines at least once a month

These medicines are mainly for coughs and colds (65%) or for headaches and migraines (59%)

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As a result, Internet purchases and the use of a health management app are unappealing

Whereas:
80% of the French have an Internet connection

And 77% of Internet users have already made purchases online (source: Médiamétrie)

Only 4% of the French have already purchased medicines on the Internet

Willing to use mobile phone or computer tools or apps to manage their health or to follow treatments (general public)/to talk with patients about their health or their treatment (doctors)?

31%

24%

And only 11% of the French say they are willing to buy non-prescription medicines on the Internet in the coming months

France has recently authorised and regulated the Internet sale of unrestricted (i.e. non-prescription) drugs. Personally, do you think you will be buying this type of medicine on the Internet in the coming months?

S-T Yes
11%

Yes, certainly

Yes, probably

1%

10%

20%

S-T No
69%

No, probably not

No, certainly not

47%

22%
Distrust in drugs is low and declining.

Of the French have no confidence in drugs, down by 3 percentage points in a year.

- 2011: 17%
- 2012: 16%
- 2013: 13%

18% of 25-34 year-olds

23% of those who do nothing when they fall ill
The main reason cited for distrust:

"Because drugs have side effects"

8% (=) of the French say they often experience side effects when they take a medicine.

32% of the French say that they often experience side effects when they take a medicine.

85% of the French will first look at the information on adverse effects when reading the information leaflet or the box.

54% (-4) of the French seek additional information about side effects (aside from the information given by the doctor or pharmacist).

For what reasons do you not trust drugs? (Base: all, 13% of the French do not trust drugs)
But the greatest fear about drugs is...

1. ... individual and collective affordability

- The social security deficit: 93%
- Complementary healthcare insurance price increases: 92%
- The cost of new treatments: 91%
- Over-consumption of drugs: 91%
- The delisting of certain drugs: 88%

**Significant threat** to the quality of care in France in years to come*

2. ... Counterfeiting

For 91% of the French (+1) **drug counterfeiting is a significant threat** to the quality of care in France in years to come.

*The precise question is: "From your point of view, does each of the following issues pose a very significant threat, a fairly significant threat, an insignificant threat, or no threat at all to the quality of care in France in years to come?"
A chain of expertise and accountability engaged in drug-related issues and providing reassurance to the French
Patient as stakeholder
+ Relationship with healthcare professionals
+ Drug supply chain
= Confidence

SPONTANEOUS QUOTES:

"Because they are effective" - 45% (+1)
"Because they are tested and monitored" - 26% (-3)
"Because they are produced and prescribed by skilled professionals" - 29% (+3)
"Because they are effective" - 60%
"Because they are tested and monitored" - 54%
A positive yet uncompromising view of drug companies
Image on the rise for drug companies while in decline for other economically affected industries

<table>
<thead>
<tr>
<th>Sector</th>
<th>Image</th>
<th>Confidence</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction</td>
<td>70%</td>
<td>61%</td>
</tr>
<tr>
<td>Pharmaceuticals</td>
<td>63%</td>
<td>69%</td>
</tr>
<tr>
<td>Telecommunications</td>
<td>61%</td>
<td>57%</td>
</tr>
<tr>
<td>Automotive</td>
<td>56%</td>
<td>62%</td>
</tr>
<tr>
<td>Agri-food</td>
<td>53%</td>
<td>43%</td>
</tr>
<tr>
<td>Mass retail</td>
<td>50%</td>
<td>37%</td>
</tr>
<tr>
<td>Nuclear</td>
<td>36%</td>
<td>58%</td>
</tr>
<tr>
<td>Banking and insurance</td>
<td>32%</td>
<td>27%</td>
</tr>
<tr>
<td>Oil</td>
<td>23%</td>
<td>28%</td>
</tr>
</tbody>
</table>

"Would you say that the image you have of businesses in these sectors is very good, fairly good, fairly bad or very bad:"

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Drug companies are seen first and foremost as businesses, in other words, as players seeking to make a profit:

- **90%** (-1) of the French and **96%** of doctors believe that the aim of drug companies is to **make a profit**
- **83%** (=) of the French and their doctors are of the opinion that drug companies only conduct research into financially profitable drugs
- And **78%** (-2) of the French **63%** of doctors think that they are more concerned with their profits than with patients

"In your opinion, are drug companies in France ... "(scale of agreement/disagreement).
Companies overwhelmingly recognised as capable of delivering "good products"

Drug companies supply high-quality drugs

They are **innovative**

- 72% (+3)
- 70%

They are attentive to drug safety

- 61% (+9)
- 78%
### Seeking the best products/seeking profitability: a duality reflected in the perception of the drug price composition

In your opinion, what are the 3 main components of drug prices?

<table>
<thead>
<tr>
<th>Component</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research and clinical trials</td>
<td>70</td>
</tr>
<tr>
<td>Profitability/profits of drug companies</td>
<td>57</td>
</tr>
<tr>
<td>The cost of drug distribution (logistics, availability to pharmacies, intermediary margins)</td>
<td>47</td>
</tr>
<tr>
<td>Manufacturing cost</td>
<td>37</td>
</tr>
<tr>
<td>Safety monitoring requirements</td>
<td>31</td>
</tr>
<tr>
<td>The cost of drug promotion</td>
<td>28</td>
</tr>
<tr>
<td>Don't know</td>
<td>7</td>
</tr>
</tbody>
</table>

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And finally, drug companies make a real contribution...

... socially and societally

• 95% (=) of the French and 94% of doctors think that drug companies play an important role in the discovery of new treatments

• 75% (+2) of the French and 78% of doctors think that they play an important role in increasing life expectancy

• And 68% (+1) of the French and 69% of doctors believe that their aim is to reduce disease

... And economically

• They are one of the drivers of growth: 57% (+6) of the French and 64% of doctors

• They are a major source of employment: 65% (+2) of the French and 79% of doctors
Confidence today and confidence for tomorrow
The French are decidedly optimistic about the future of drugs

77% of the French think that in 20 years, drugs will have improved compared to today.

In your opinion, in 20 years, will drugs be:

- More practical to administer: 64%
- With better controlled side effects: 65%
- Better monitored: 60%
- More effective: 62%
- More rapidly accessible: 52%
- Riskier: 16%
Do you think that in coming years drug companies will manage to develop effective treatments against each of the following conditions?

- Diabetes: 88%
- Cardiovascular disease: 88%
- AIDS: 85%
- Cancer: 84%
- Inflammatory diseases such as multiple sclerosis and rheumatoid arthritis: 79%
- New infectious diseases, pandemics or epidemics: 77%
- Alzheimer's disease: 77%
- Depression and psychiatric disorders (anorexia, bulimia ...): 63%
The patient: an active stakeholder with a mature relationship towards drugs.

The patient's involvement reshapes the relationship with the doctor.

The drug supply chain.

A positive yet uncompromising view of drug companies.

Personal, pragmatic and cognition-based trust.

Trust in healthcare professionals: doctors and pharmacists.

Trust in the system's ability to ensure traceability and monitoring: as the whistleblowers and crises prove?

Trust in companies whose interest is to continue to deliver good products.
Questions? Exchanges of view?