



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

**Identical to 2011
and 2012 –
comparable
findings**



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

New



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



.... followed closely by the French



2011
The Mediator drug scandal

98% awareness
(Observatoire 2012)



February 2012
Critical report by the National Academy of Medicine on generic drugs

May 2012
Mediator drug trial begins



52% awareness
(Observatoire 2013)

July 2012: National roll-out of the "tiers-payant contre générique" scheme to all insured patients, regardless of the health insurance scheme to which they belong.



September 2012: Debré and Even's book "The Guide to 4,000 Useful, Useless and Dangerous Medicines"



14 January 2013: Launch by GEMME, the French Generic Medicines Association, of the three-week communications campaign on generic drugs



February 2013
(subsequent to the survey):
Dr Even's book on cholesterol

69% recollection of "a generic drug campaign"
(Observatoire 2013)



The journal Prescrire publishes a list of drugs that should be withdrawn

December 2012/January 2013: Controversy surrounding the 3rd and 4th generation pills



95% awareness
(Observatoire 2013)

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



87% (-2)



86%

80% (+2)

73%

61% (+5)

56%

60% (+1)

71%

Despite this context, confidence in drugs is strong and growing among the French and doctors alike



2011

82%

2012

84%

2013

87%

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

94%

doctors have confidence in drugs



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

The key drivers of confidence in drugs

1

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

1

The patient: an active stakeholder with a mature relationship towards drugs



A patient is now an active stakeholder with a mature relationship towards drugs



**Personal
experience**

Knowledge

Information

Experience

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

Experience

... and highly satisfying



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

92% have confidence in the medicines they take



Experience

An efficacy spontaneously expressed

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



45% (+1)

"Because they are effective"

They are effective and give good results

26% (-1)

They are healing. They cured me.

19% (+1)

They provide relief. They soothe pain.

5% (+1)



Experience

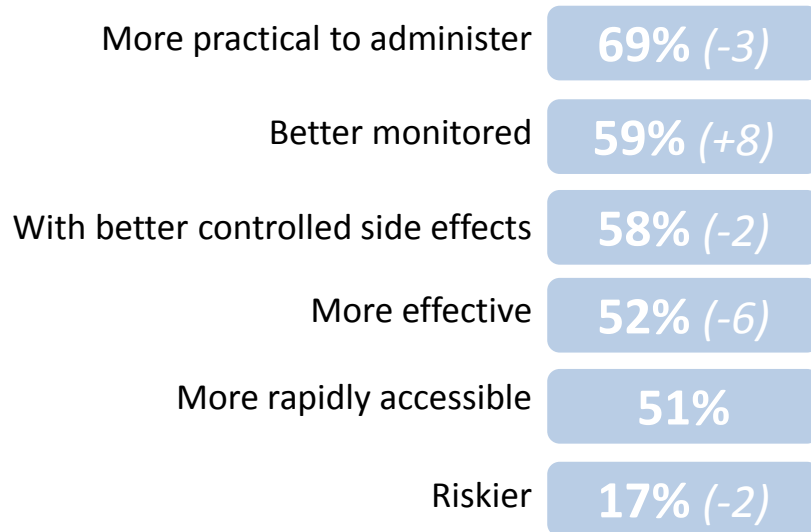
The French who focus attention on the drug advances that have benefited them in practice



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



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**

50 year olds and over

93%

18-24 year olds

84%

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.

2

**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.



90% (=)



100%

Drugs are active products that pose some risks

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%



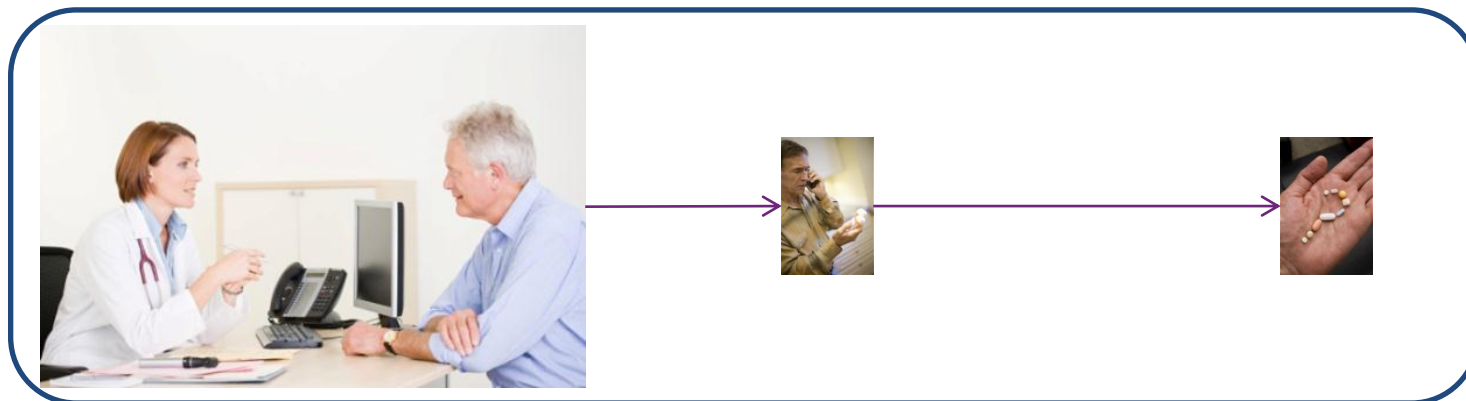
58% (-7)

There is no difference in efficacy between a drug and its generic equivalent



50%

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%

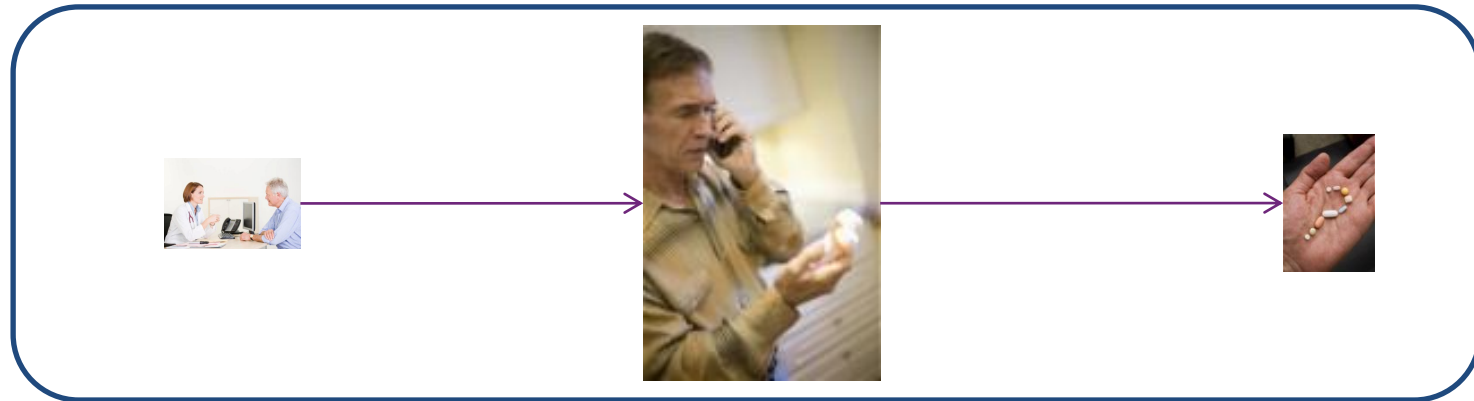


Do some patients ...

...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%

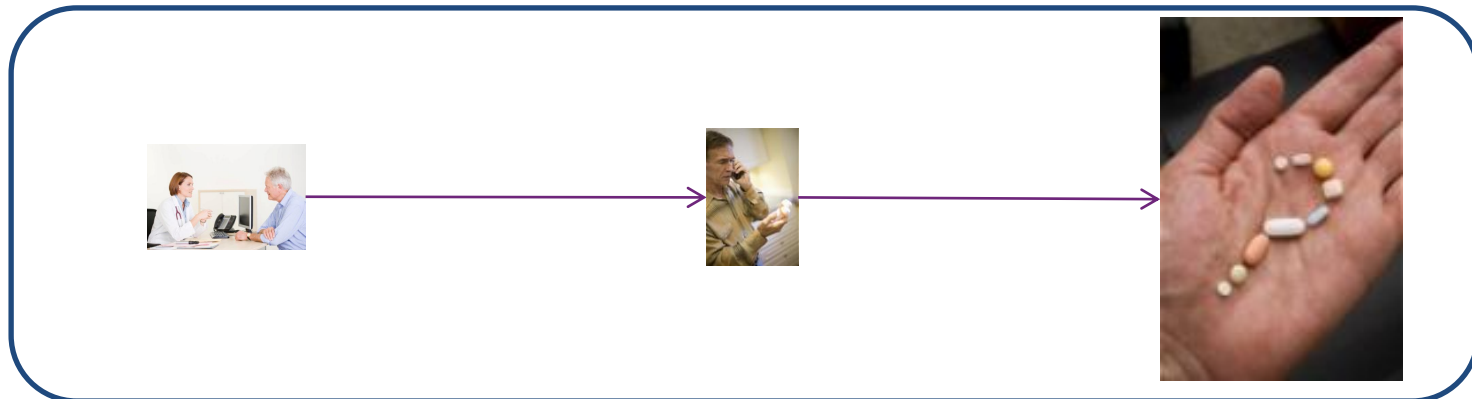


Do some patients ...

...ask you to prescribe them a particular drug?

96%

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 ...

93%

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

93%

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

3

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

OPEN QUESTION
(SPONTANEOUS QUOTES)

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)



Endorsement by the doctor
Prescription drugs

93% (-2)

Public endorsement
Refundable drugs

92% (-2)

Brand commitment
Brand-name drugs

88% (-2)

Endorsement by the doctor
Prescription drugs

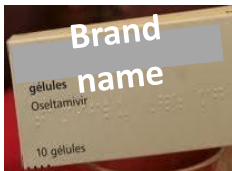
99%

Public endorsement
Refundable drugs

95%

Brand commitment
Brand-name drugs

82%



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

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



And is declining year on year

And the difference between drug types is even stronger among doctors



No endorsement by the doctor
Non-prescription drugs

66% (-4)

No endorsement by the doctor
Non-prescription drugs

41%

No public endorsement
Non-refundable drugs

74% (-3)

No public endorsement
Non-refundable drugs

56%

No brand commitment
Generic drugs

70% (-8)

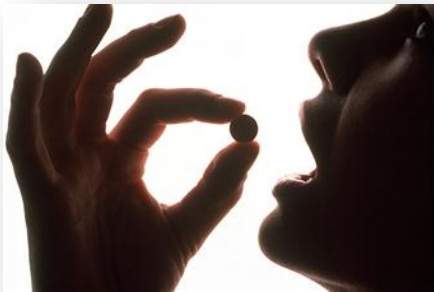
No brand commitment
Generic drugs

67%

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%)

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%

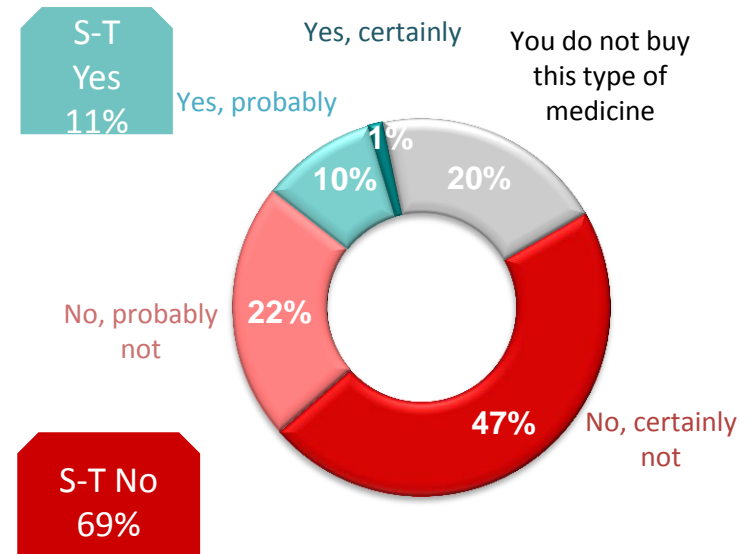


24%



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?



Distrust in drugs is low and declining



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

18% of 25-34 year-olds

23% of those who do
nothing when they fall
ill

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%

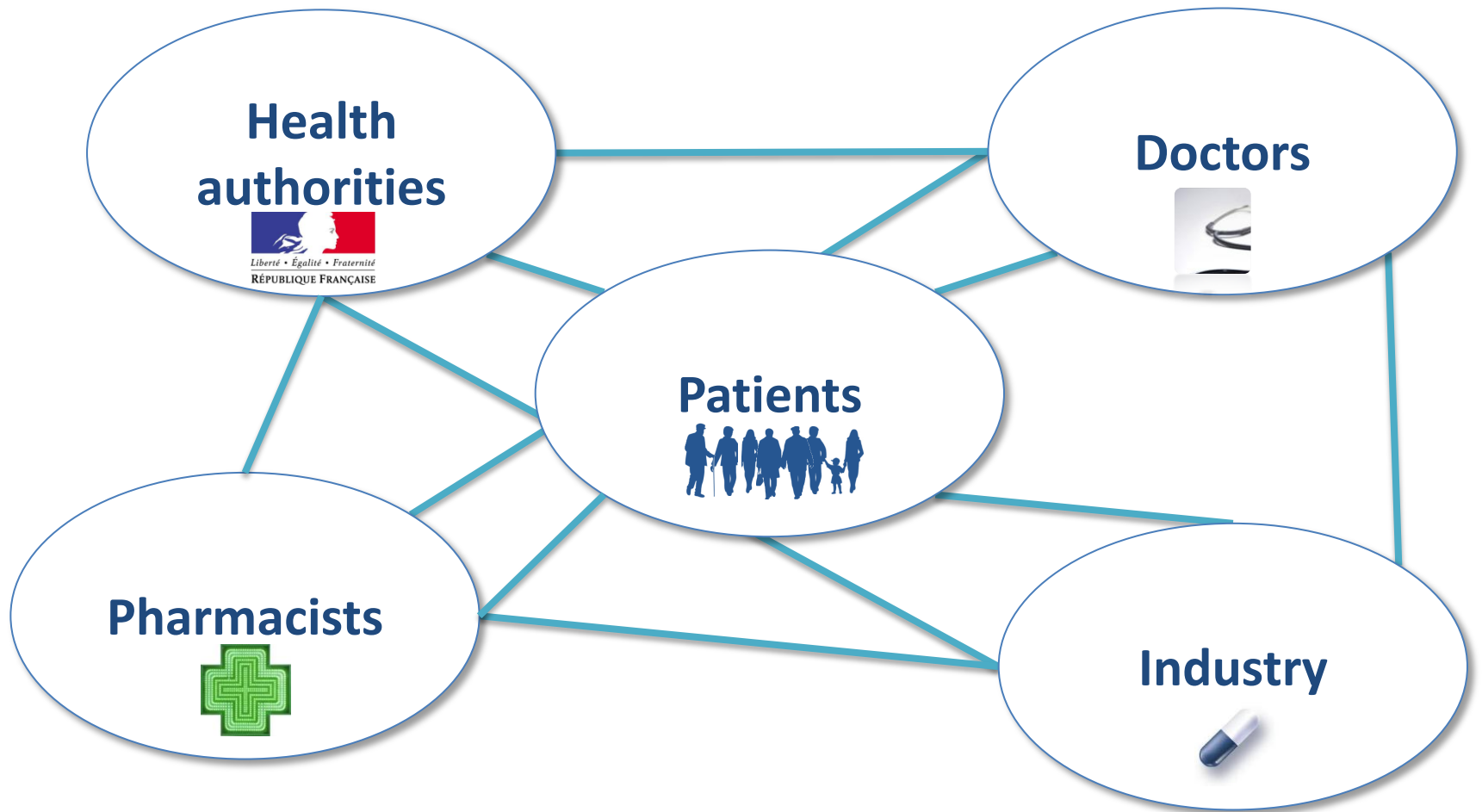
Significant threat to the quality of care in France in years to come*

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



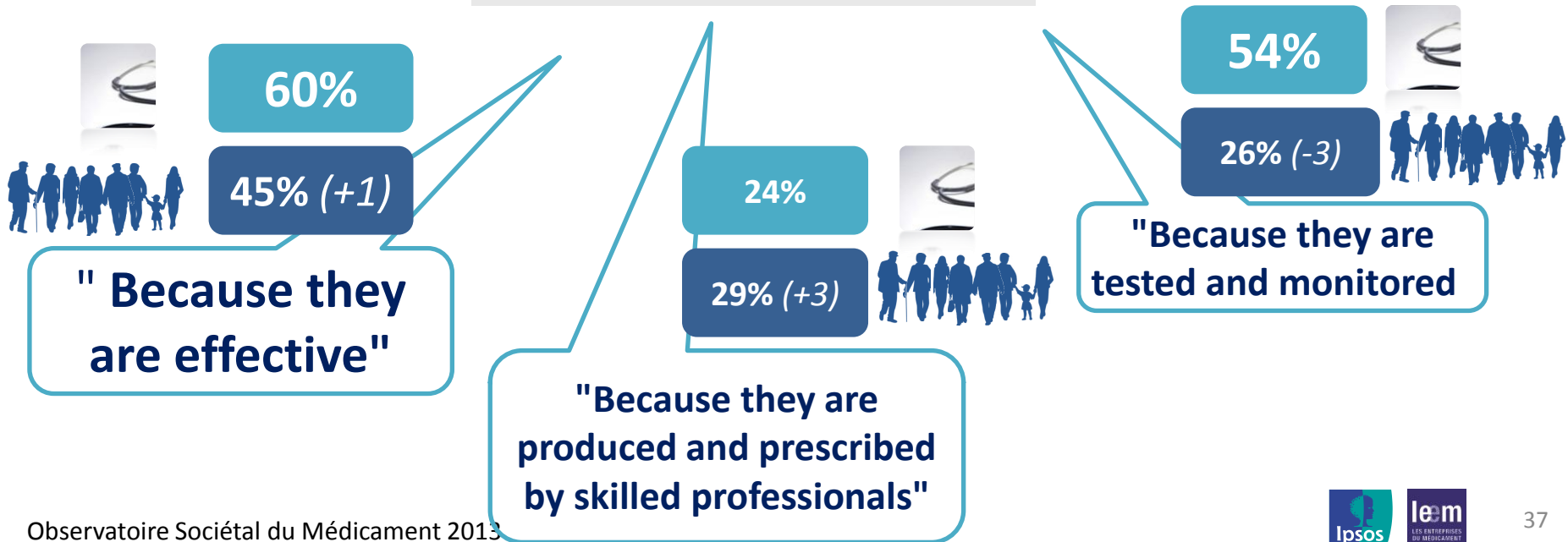
**The precise question is: "From your point of view, does each of the following issues pose a very significant threat, a fairly significant threat, an insignificant threat, or no threat at all to the quality of care in France in years to come?"*



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:

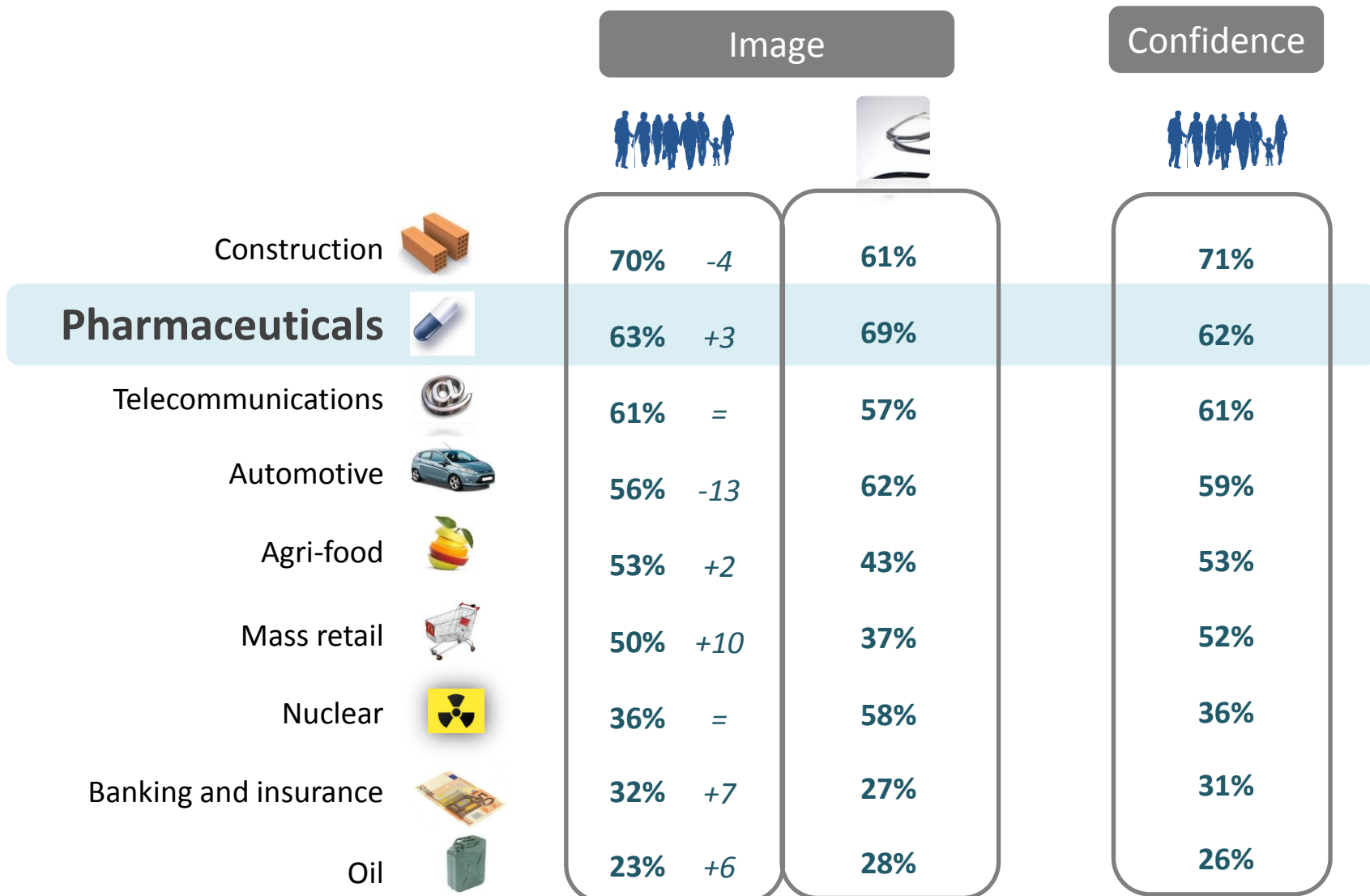


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**A positive yet
uncompromising view of
drug companies**



Image on the rise for drug companies while in decline for other economically affected industries



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

The pursuit of profit by drug companies: a clearly painful reality for the French and their doctors



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"



75%
(+1)



92%

Drug companies supply
high-quality drugs



72%
(+3)



70%



61%
(+9)



78%



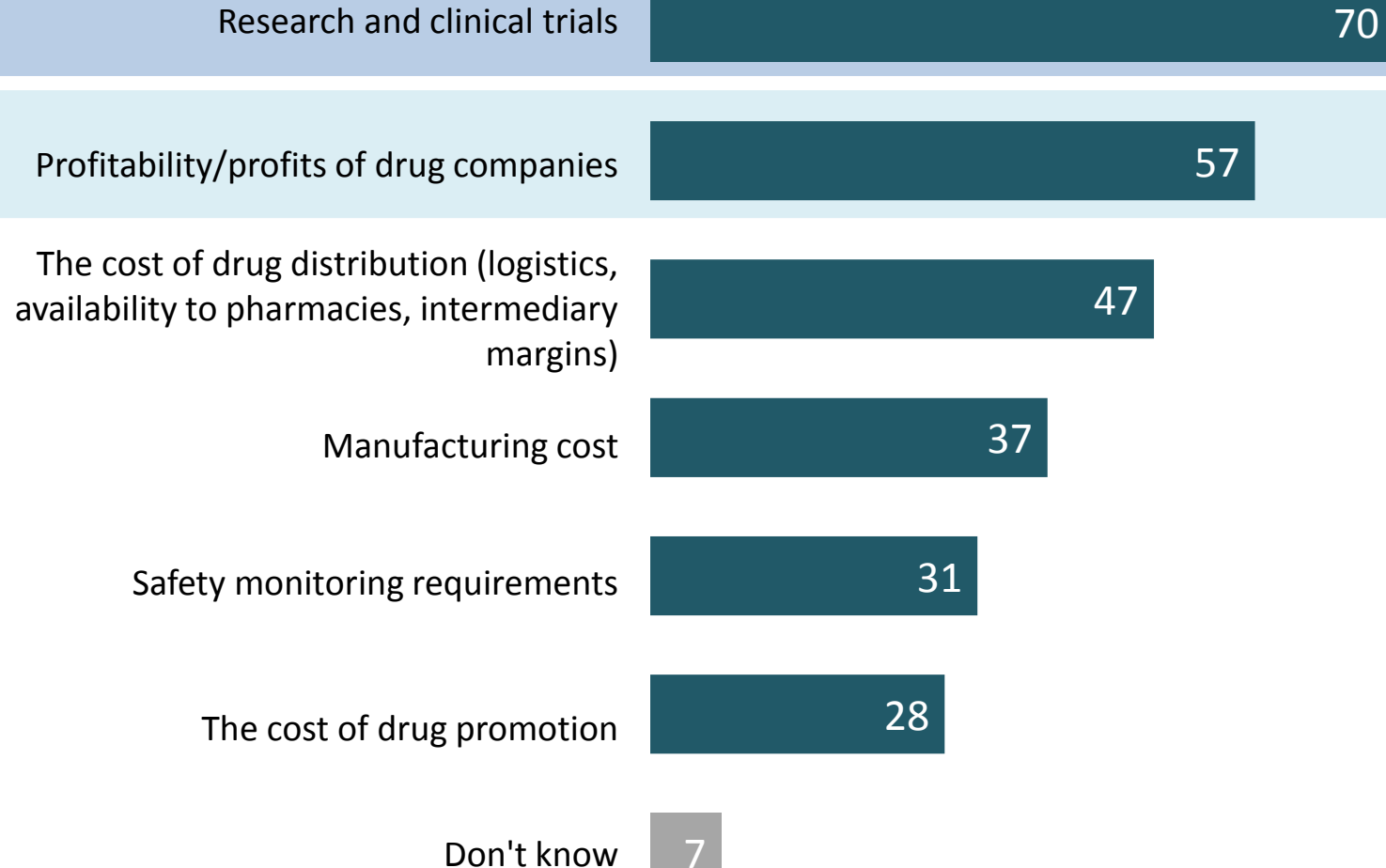
They are **innovative**

They are attentive to drug
safety

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?



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

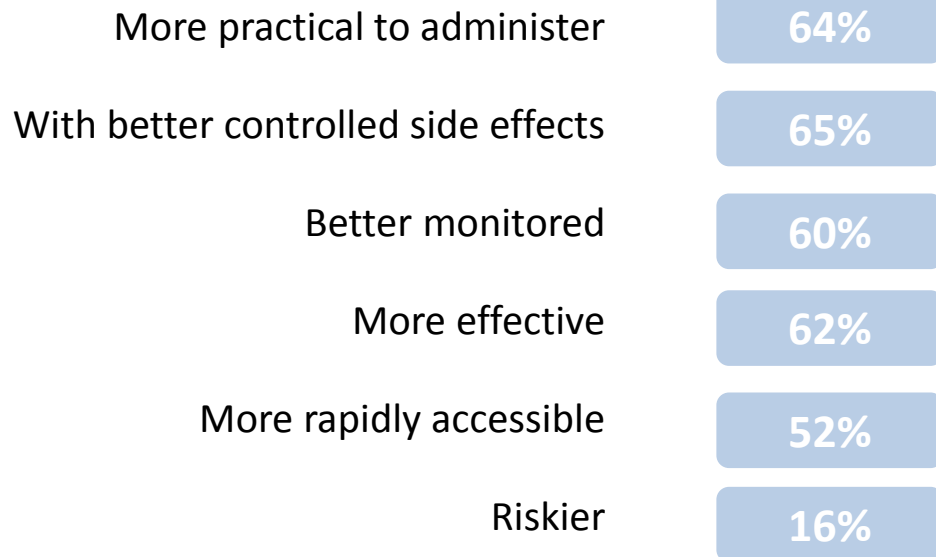
Confidence today and confidence for tomorrow

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

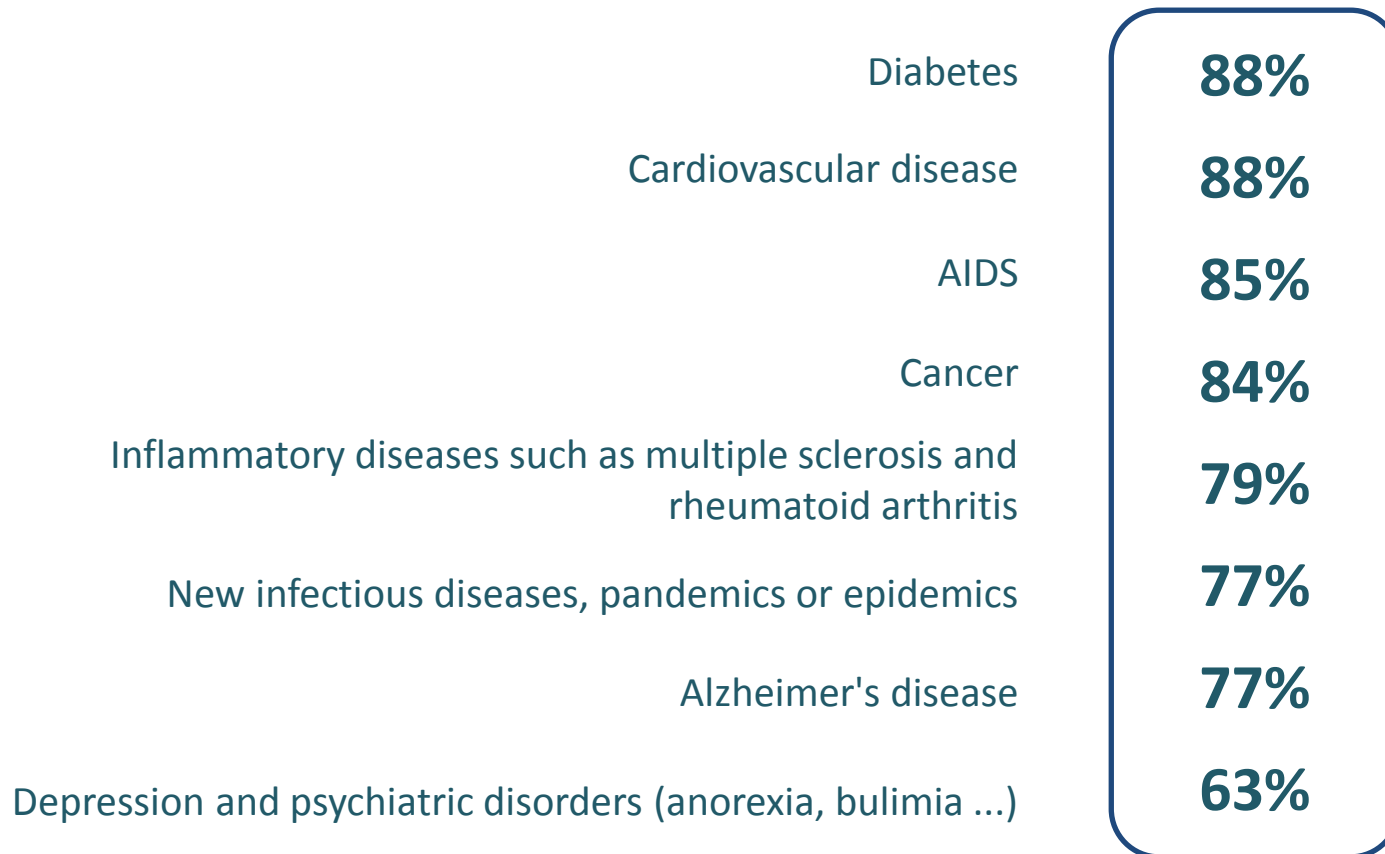


In your opinion, in 20 years, will drugs be:



Positive results expected in the fight against disease, thanks to the actions of drug companies

Do you think that in coming years drug companies will manage to develop effective treatments against each of the following conditions?



1



**The patient: an active stakeholder
mature relationship towards**

**Personal, pragmatic and
cognition-based trust**

2



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

**Trust in healthcare
professionals: doctors and
pharmacists**

3



The drug supply chain

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

4



**A positive yet uncompromising
view of drug companies**

**Trust in companies whose
interest is to continue to
deliver good products**

Questions? Exchanges of view?

