



Online market of RX drugs in Italy: consumer readiness, opportunities and challenges

Realized by IQVIA for the European Association of E-Pharmacies (EAEP)

April, 2026

Survey among Italian Adult Population



Key results

The online RX service shows high potential for half of the Italian population

higher propension among :

- Online purchasers
- Chronic patients and regular buyers of RX drugs
- Younger users

The success of the service will depend on some crucial conditions

Especially:

- Trust /safety (product integrity)
- Operational reliability (timely delivery, easy access, usability)
- Connection /support by the pharmacist

Building user trust and ensuring a reliable, secure process will be critical to overcome skepticism

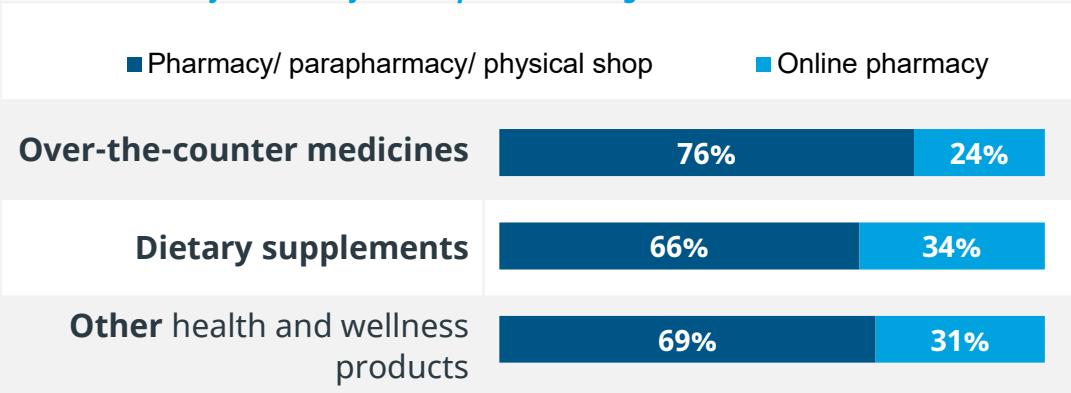
Integration with the existing public pharmaceutical system is key

Such as:

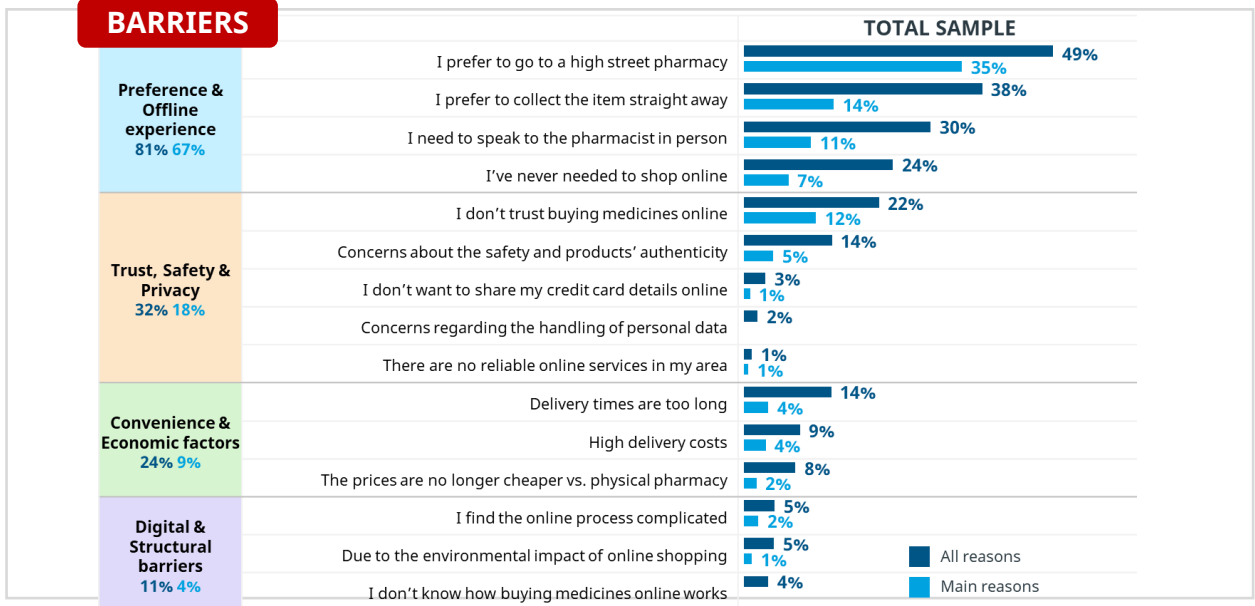
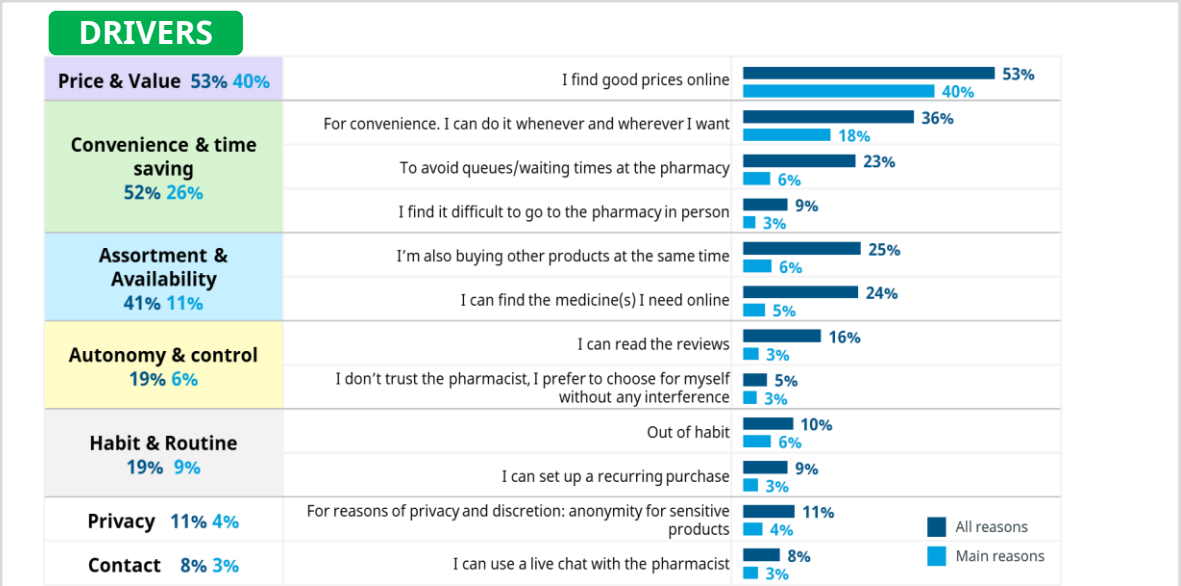
- FSE (Fascicolo Sanitario Elettronico)
- PT (Piano Terapeutico)
- GPs and hospital prescription process

Online purchasing is already part of the consumer habits of about 1/3 of consumers

Share of channel of health products bought in the last 12 months



Online purchases are primarily driven by price, followed by convenience and availability. Offline preference remains the main barrier to online adoption, followed by preference to pick up item straight away and trust



Online market of Rx drugs in Italy : consumer readiness, opportunities and challenges | April 2026
 Sample of 1000 individuals, representative of Italian Adult (18+) population - CAWI Survey

Half of Italian consumers show strong interest in the new online pharmacy service and say they would use it if available

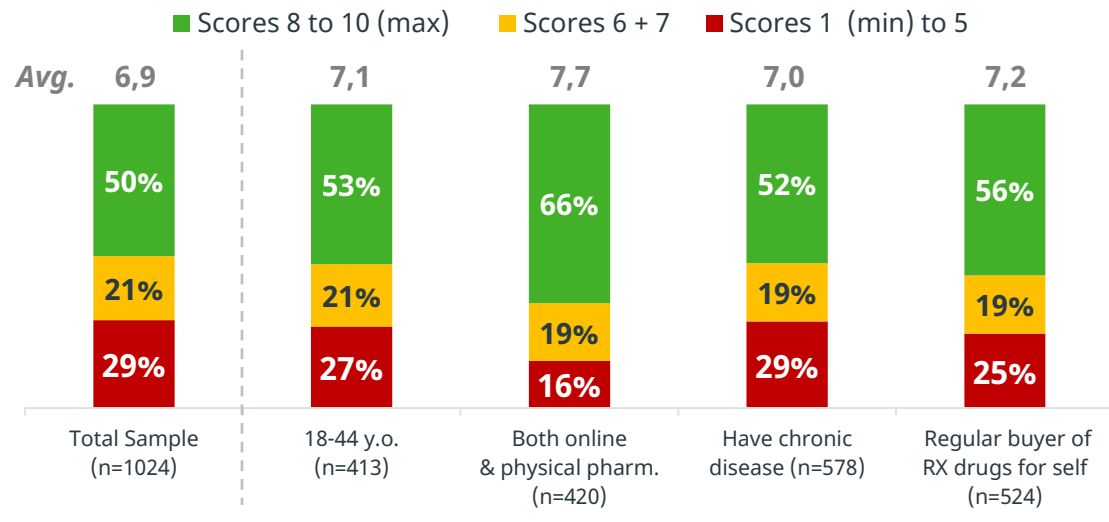
Online RX pharmacy service: reactions to the concept

Half of Italian consumers show strong interest in the new online pharmacy service and say they would use it if available. On average the concept is rated 6.9 out of 10 in appeal, higher propension among:

- **Online buyers:** people already purchasing medicines online are notably more inclined to use the service (average interest 7.7/10). Prior e-pharmacy users clearly emerge as a key receptive segment.
- **Patients managing chronic conditions and regular buyers of prescription drugs** show above-average interest for the online pharmacy option, considering the service as beneficial for convenience and adherence.
- **Youth are more receptive:** interest and intent-to-use levels are higher among 18–44-year-olds

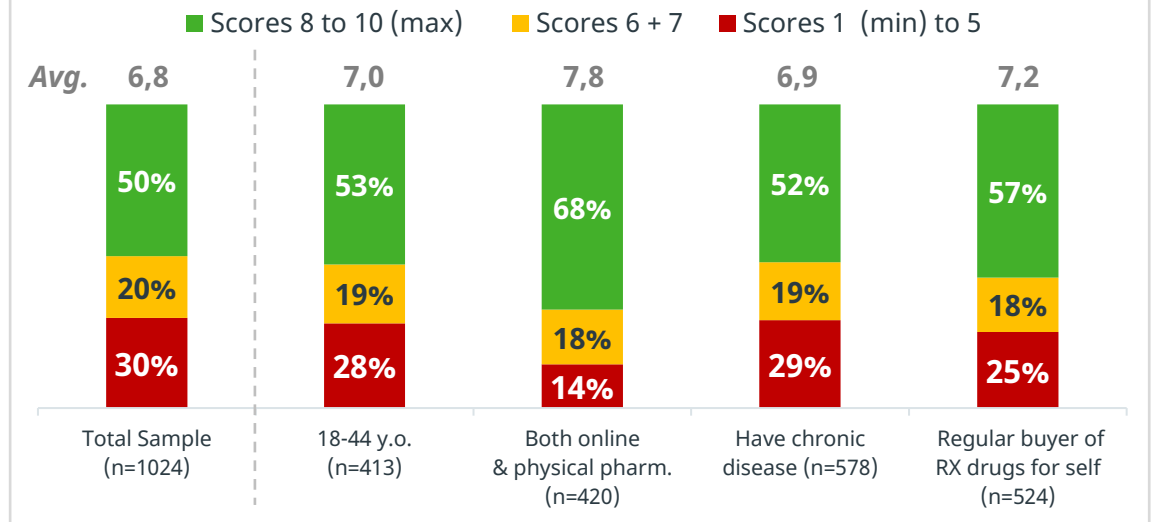
INTEREST IN THE NEW SERVICE

On a scale of 1 to 10, where 1 is the lowest score and 10 is the highest, how interesting do you find this service?



INTENTION TO USE THE SERVICE

On a scale of 1 to 10 how likely are you to use this service, if it were available, to buy products for yourself?



Convenience and pharmacist support are the main benefits perceived of the online Rx pharmacy service

PERCEIVED BENEFITS

Showing mentions >2%	%
AT LEAST ONE POSITIVE MENTION	72%
CONVENIENCE (NET)	31%
It's convenient/practical to use/useful	10%
Home delivery/the ability to have everything delivered to your home/quickly	7%
It's simple/easy to use/easy to purchase	6%
The convenience of purchasing prescription medications from home/without going to the pharmacy	6%
It's fast/speed of purchase/time-saving	5%
ASSISTANCE (NET)	22%
Continuous remote assistance from the pharmacist	18%
Competent pharmacist available for advice, questions, or concerns	3%
Possibility of after-sales assistance	2%
Provides you with reminders for taking medications	2%

SERVICE FEATURES (NET)	16%
It's a good/excellent service	6%
It's an online service	3%
It's interesting	3%
It's an efficient/effective service	2%
It's a clear/transparent service	2%
SECURITY (NET)	5%
It's a safe/reliable service/guarantees security	4%
ADAPTABILITY (NET)	2%
PRICE (NET)	2%
OTHER (NET)	8%
Likes the clear/detailed description of the service/images/graphics	7%
<i>Don't know/ no answer</i>	<i>28%</i>

Overall, **72% Italian could name at least one positive feature** they liked about the service

The **most appreciated aspects** of the online pharmacy service are:

- its convenience
- the availability of professional support

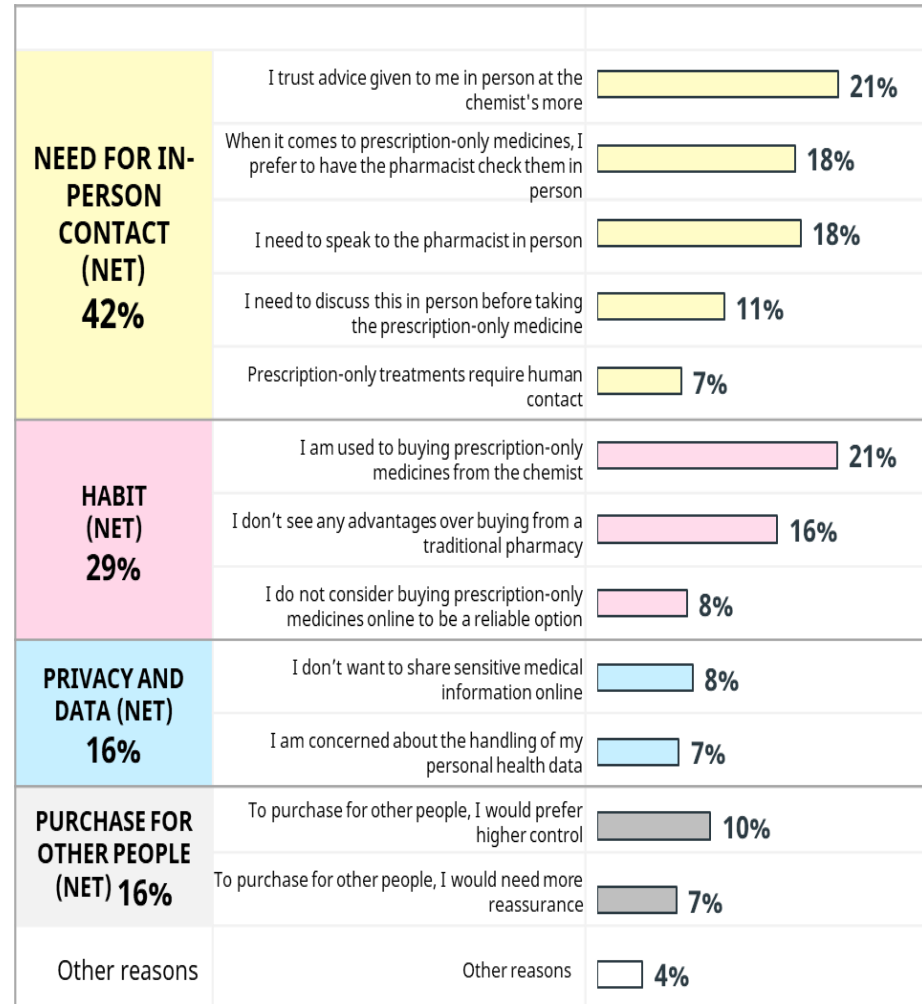
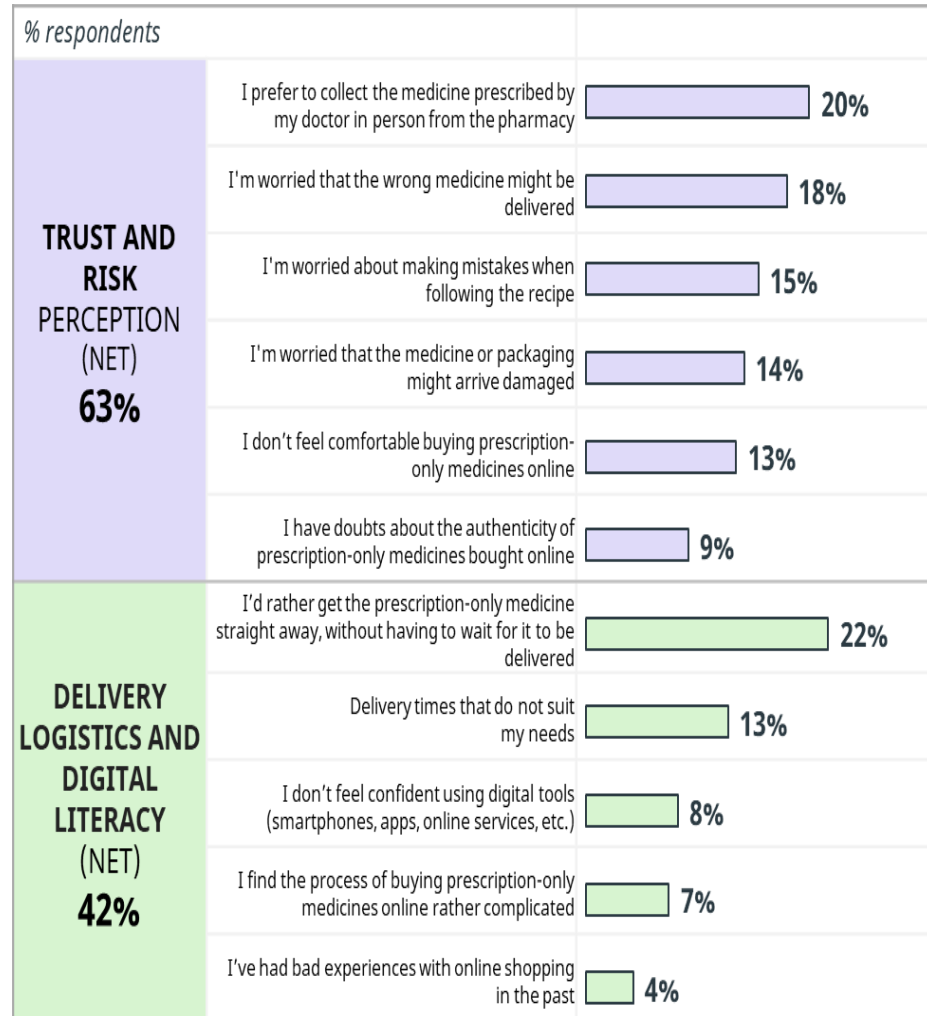
About one-third of respondents cited the convenience of **ordering from home and saving time** (including quick home delivery) as a major advantage. Additionally, around 22% highlighted the value of having a **pharmacist's guidance available remotely** for consultations and questions – a feature seen as reassuring and helpful.

TOP ENVISAGED OCCASIONS OF USE

When it is difficult for me to go to the pharmacy in person (inconvenient opening hours, distance, mobility issues)	45%
To purchase regular medication and renew prescriptions	41%
If I need non-urgent medicines I can wait for	41%

The concept tends to **appeal most where it can reduce the burden of routine pharmacy trips or help patients who face challenges with in-person pickup**

Low intention to use the service is primarily driven by trust and risk perceptions, followed by operational barriers and the need for in-person interaction with the pharmacist



The key barriers expressed are:

- **Trust and in-person preference:** the main barriers to adoption centre on **trust** and the **preference for in-person pharmacy experiences**
- Many are **uneasy about buying medicines online – safety concerns** and **lack of trust in online handling of drugs** were cited as main barriers
- Some also mention hesitancy to share payment or personal data online for health purchases.
- Other noted hurdles include **delivery logistics and digital literacy**

Patient advocacy groups (PAGs) are positive about the introduction of an online pharmacy service while asking for safety measures

- They acknowledge that **this model could greatly benefit patients** – particularly those with **chronic diseases** or **mobility limitations** – by simplifying access to medicines and improving adherence through home delivery and remote support
- However, the PAGs stress that **certain conditions must be met for the service to be viable and trusted**: it must be **safe** and **transparent**, guaranteeing the **authenticity of drugs** and **proper handling** (e.g. respecting cold-chain delivery for temperature-sensitive medications)
- They also emphasize the **need for integration with the public healthcare system**, such as linking the platform (FSE), hospital drug delivery and existing prescription processes to ensure equity and continuity of care



Overall, Patient advocacy groups are **open to the development of online pharmacy service** and willing to collaborate to make it a reality as a **complementary channel to physical pharmacies**, with the aim of **improving patients' quality of life and providing additional support**—particularly for those living with **chronic conditions**, facing mobility limitations, or experiencing logistical challenges. Ensuring safety and product integrity, timely delivery, and full integration with regional, territorial, and hospital prescribing systems is considered essential.