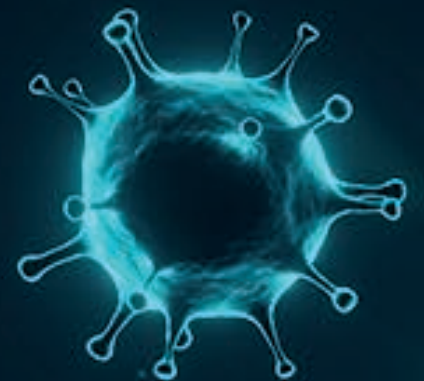
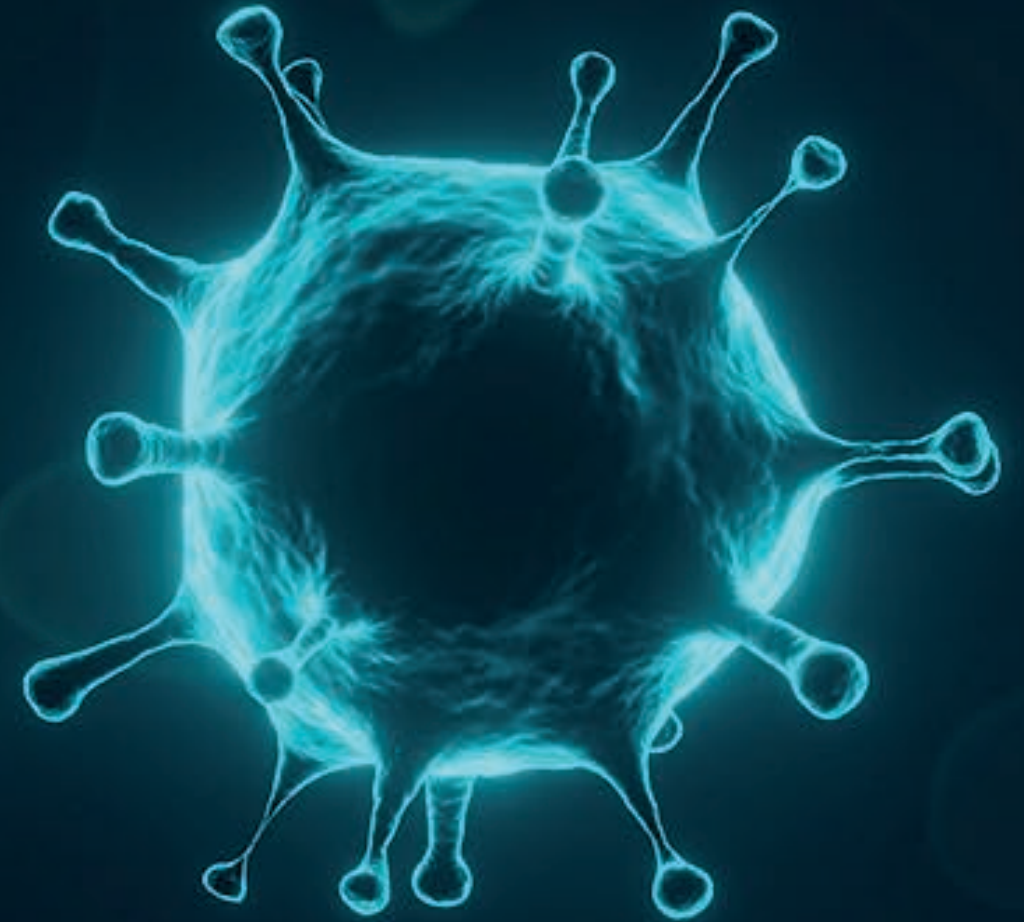


CORONAVIRUS: PHYSICIAN AND PATIENT PERSPECTIVES WEEK 3

 M3 GLOBAL RESEARCH



CORONAVIRUS: PHYSICIAN AND PATIENT PERSPECTIVES

WEEK 3

In the third week of this study we've analysed responses from 3,574 HCPs and 851 patients in Europe and the USA. There is no incentive available for participation, and the respondents represent a random sample of all M3 Global Research panel members.

As the concentration of cases in Western Europe continues, we're seeing opinions trend in line with those of Italian respondents in earlier weeks of the study.

As with last week, the biggest shifts can be seen in perceptions of the threat level that Covid-19 presents, and, particularly in the UK, a concern about preparedness, with only 37% confident in local plans. Incidence of viral mutation remains low, at 7% globally.

▶ 3,574 HCPs

▶ 851 Patients

							Other	Total
WEEK 1 3-6 March 2020	290 40	196 25	518 128	389 51	510 95	1,352 347	13 1	3,268 687
WEEK 2 10-12 March 2020	653 54	280 26	785 140	463 55	201 100	841 560	971 0	4,194 935
WEEK 3 17-19 March 2020	347 36	202 16	552 100	368 36	190 106	1,450 555	465 2	3,574 851

N.B. 'Other' includes respondents in Austria, Belgium, Denmark, Finland, The Netherlands, Norway, Sweden, and Switzerland.

CONFIDENCE IN GOVERNMENT AND LOCAL PLANS

Global HCP confidence has decreased to 60% as respondents start to tackle Covid-19 cases in their own clinical settings, and government plans evolve in response. French patients are particularly supportive of their government with 83% confident in their plans, up from 61% last week. The HCP picture in Italy remains consistent despite the high incidence of cases, but elsewhere confidence in the government's preparedness has dropped from 61% to 41% in the UK, and 64% to 46% in the USA.

In terms of local plans, patient confidence has increased to 65%, and 66% for HCPs, largely unchanged from last week. At a country-level however, although confidence is largely improved, the UK has seen a drop to 37% (56% last week) reflecting the fast-changing situation there.

At a hospital / facility level there's very little change, even in the UK. The only noteworthy change is in the USA, dropping from 71% to 64%.

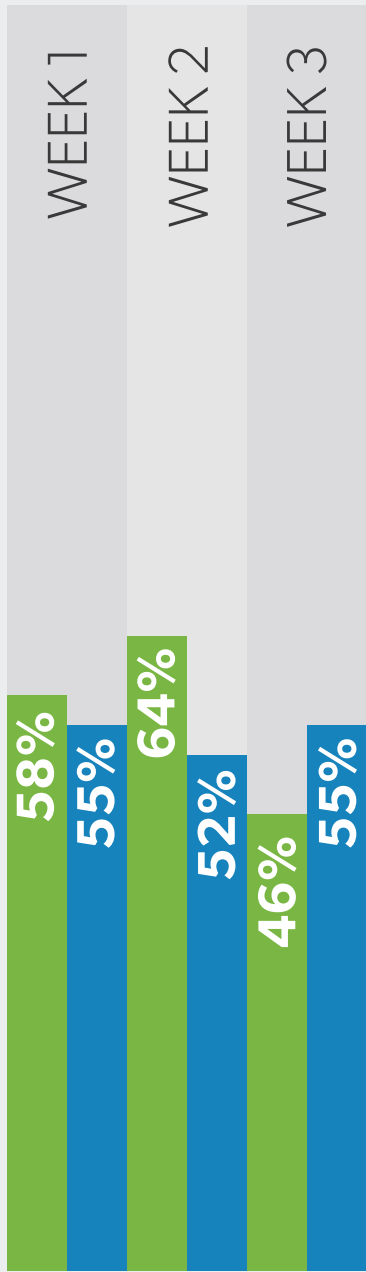
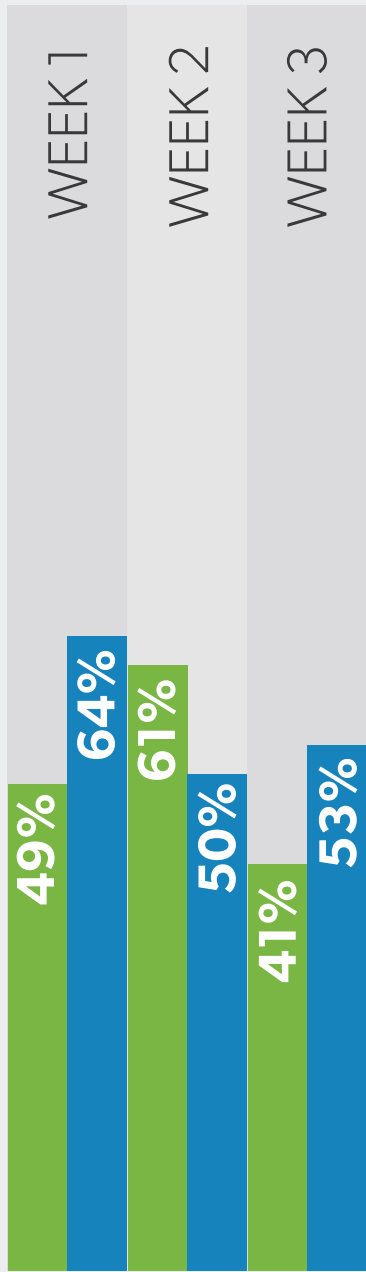
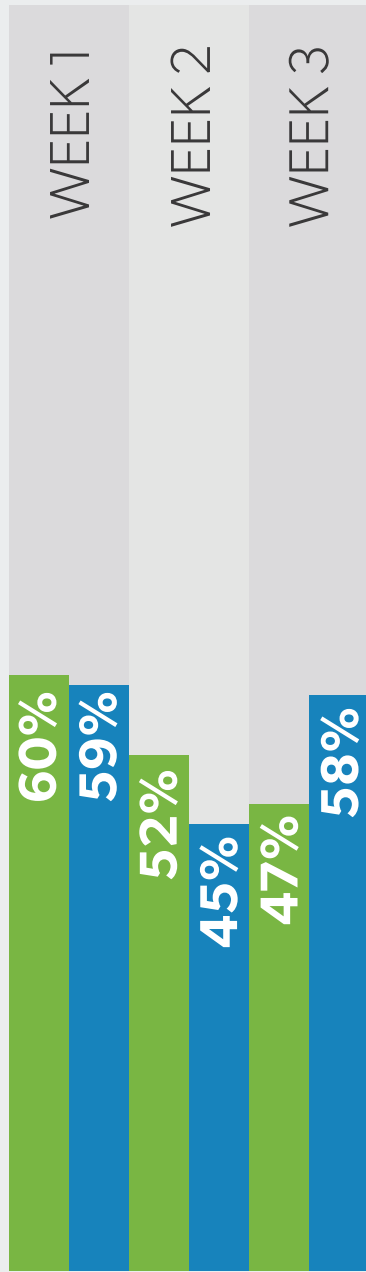
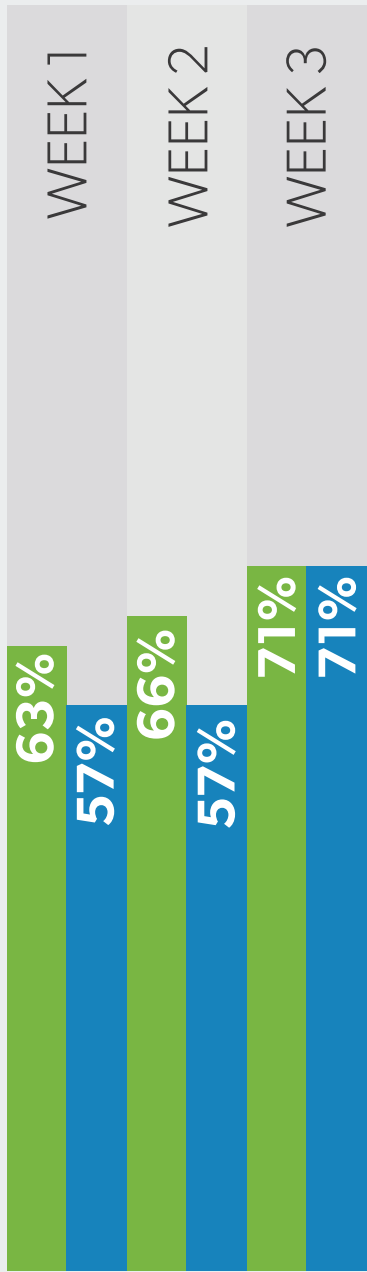
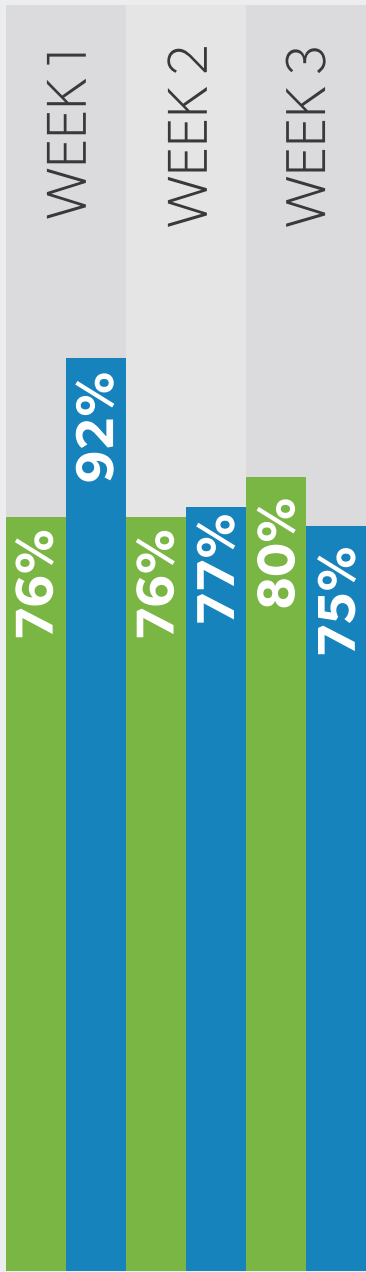
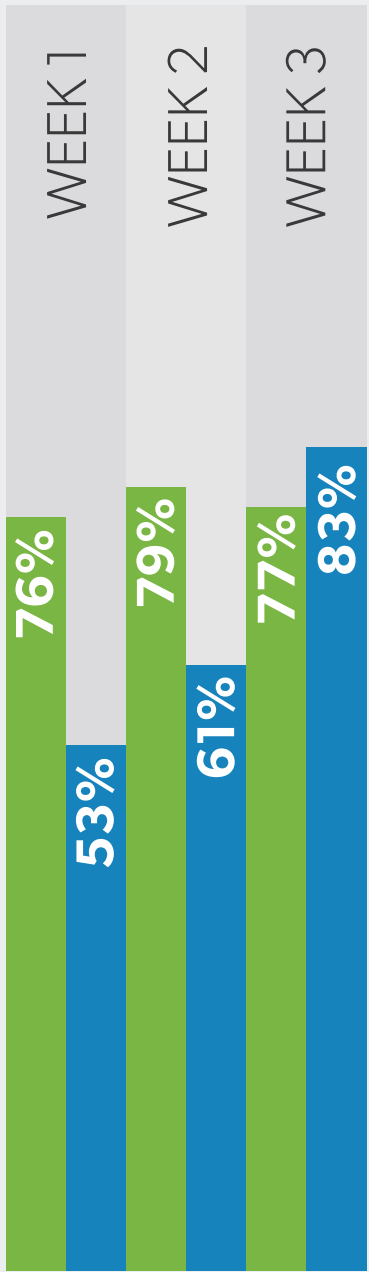
How confident are you in your government's preparedness to handle 2019-nCoV should it impact your country on a widespread level?

▶ HCPs
▶ Patients

ALL



How confident are you in your government's preparedness to handle 2019-nCoV should it impact your country on a widespread level?



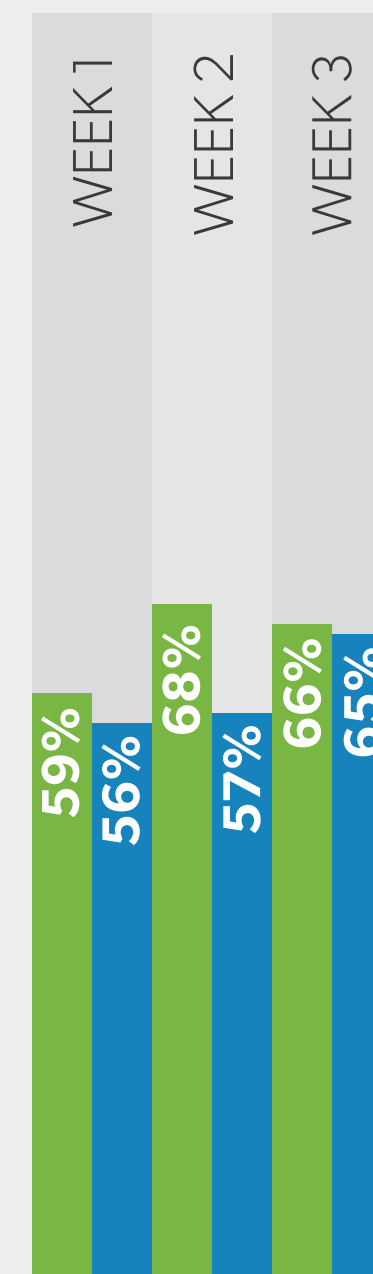


What is your level of confidence in the local plans in place to contain the spread of 2019-nCoV in your community?

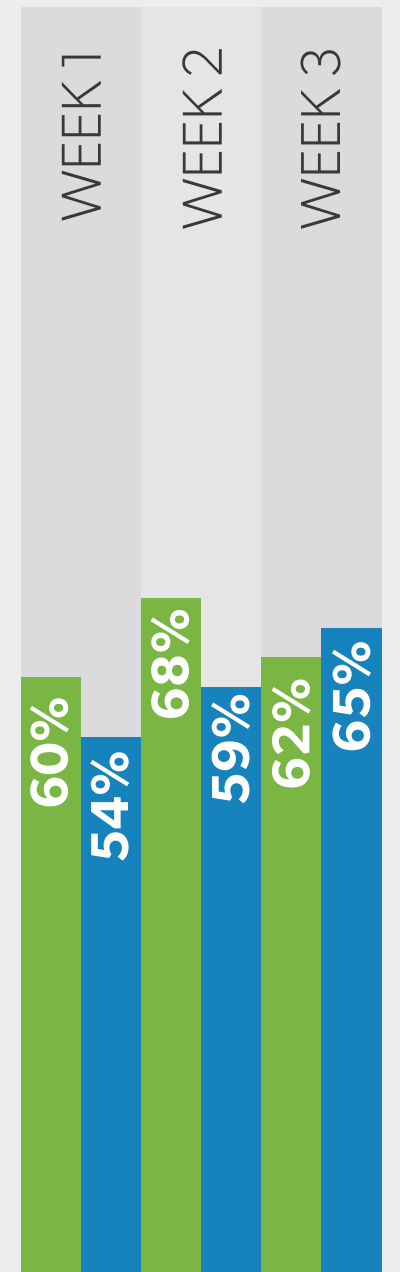
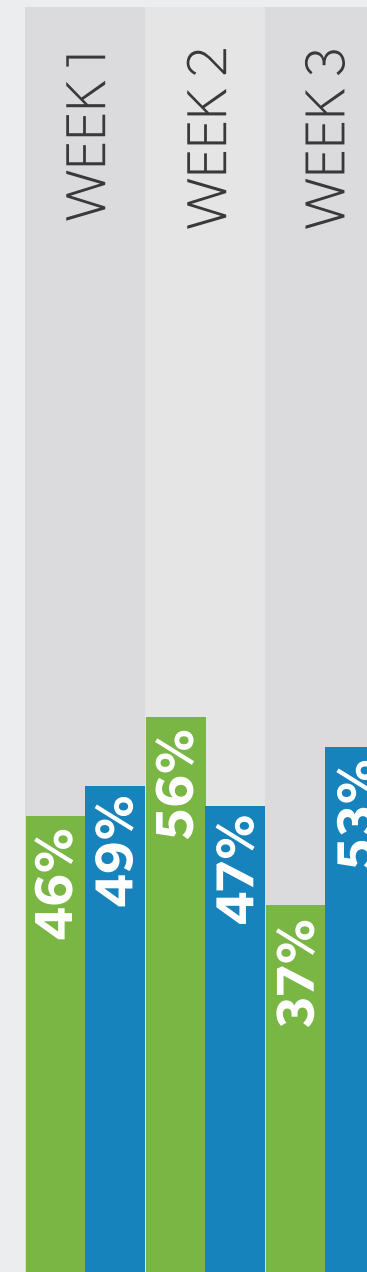
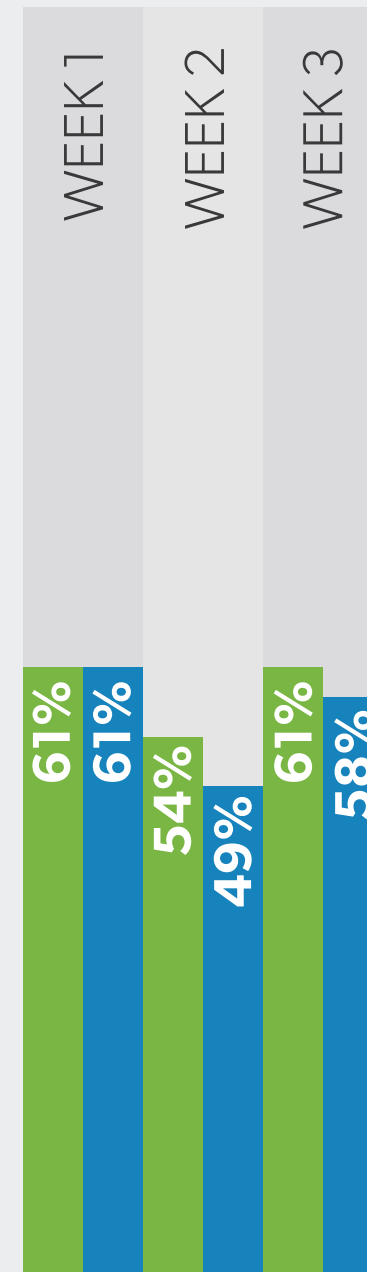
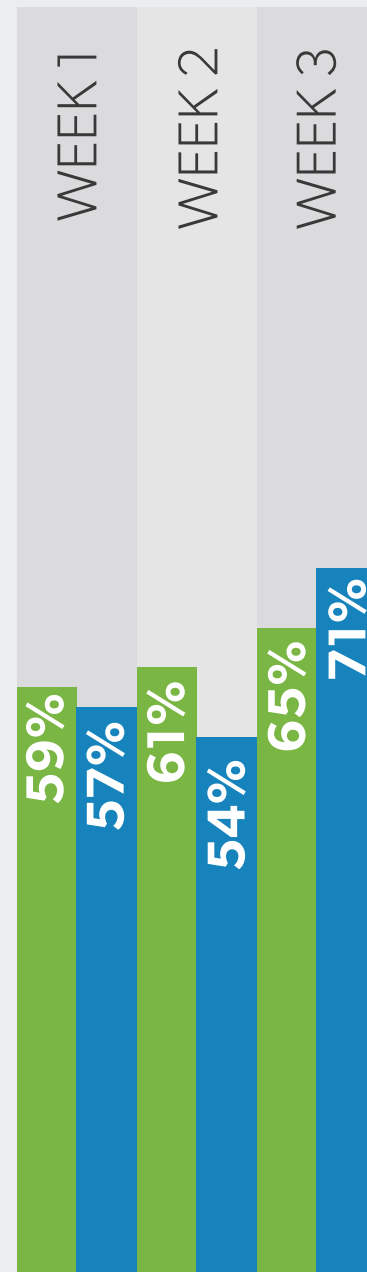
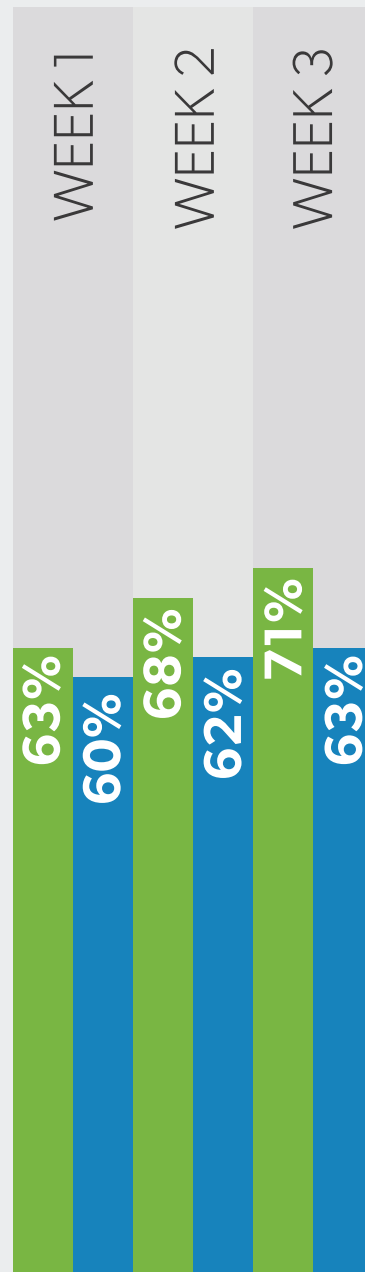
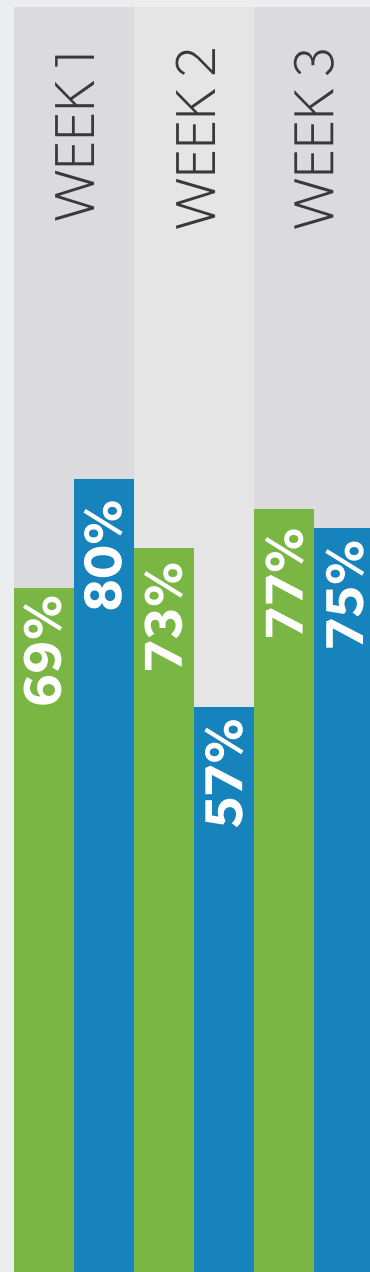
▶ HCPs

▶ Patients

ALL



What is your level of confidence in the local plans in place to contain the spread of 2019-nCoV in your community?

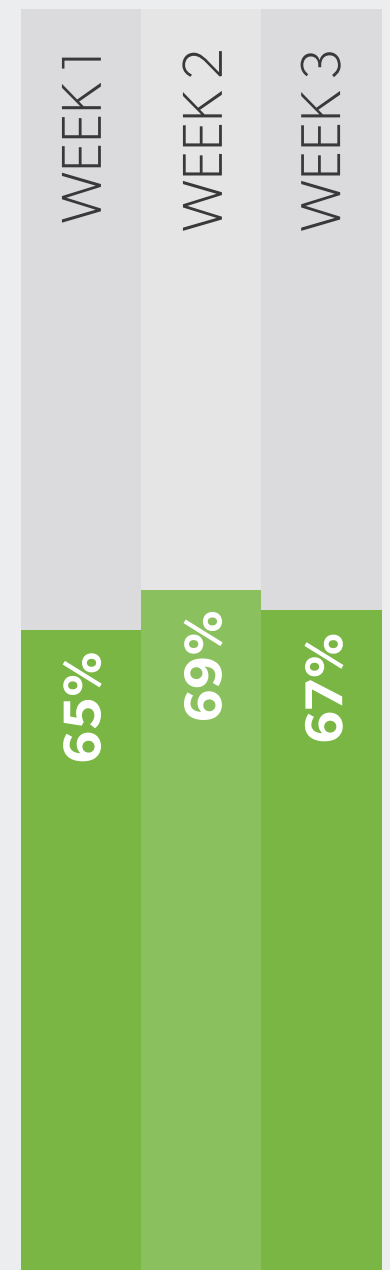




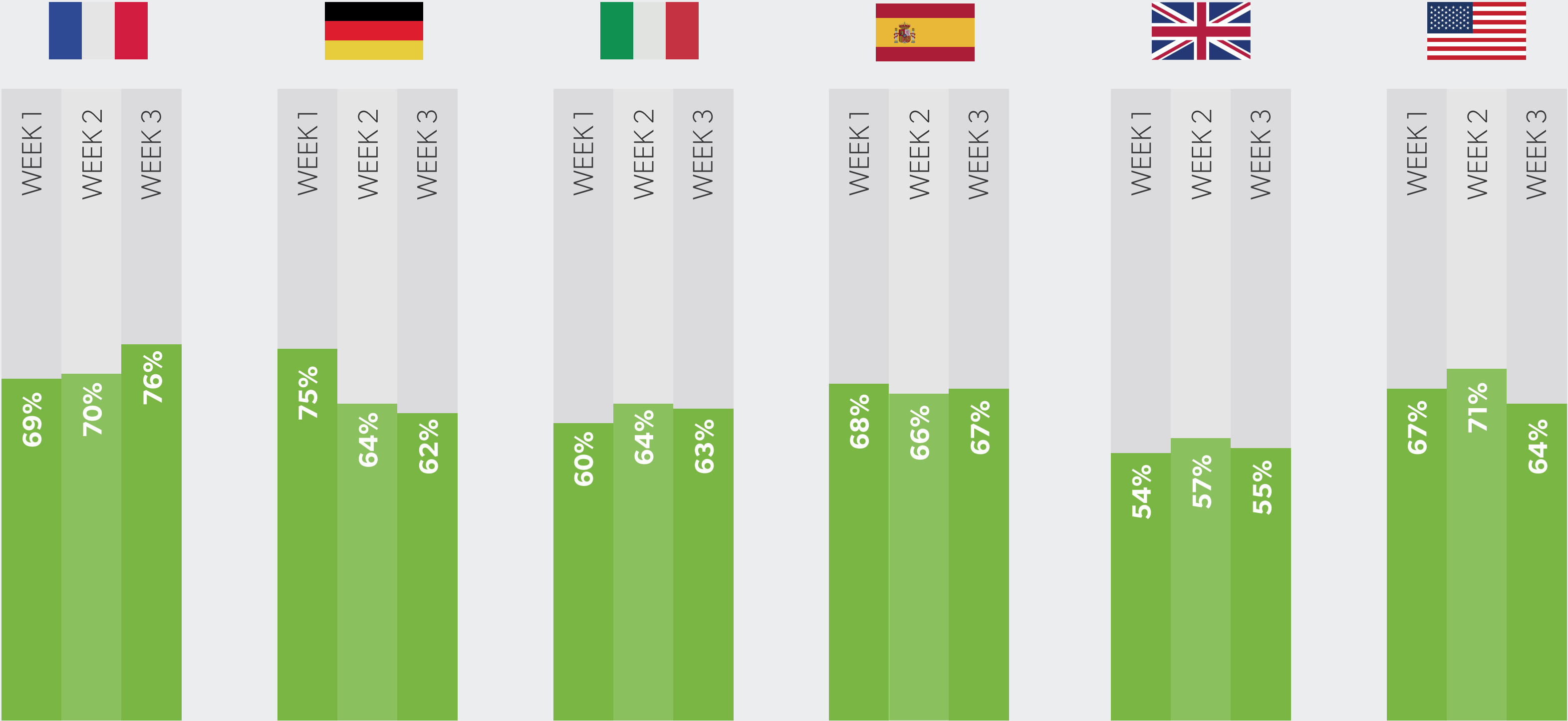
How prepared do you think your facility or organization is to handle a severe outbreak of a virus such as 2019-nCoV?

▶ HCPs

ALL



How prepared do you think your facility or organization is to handle
a severe outbreak of a virus such as 2019-nCoV?



HOW SERIOUS OF A THREAT IS COVID-19 AT A LOCAL LEVEL?

As the focus of the disease moves away from Asia and there is an increased prevalence of cases in Europe and the USA, it's unsurprising that both HCPs and patients are increasingly seeing Covid-19 as a severe threat to their community.

Last week saw significant increases, and this week that pattern continues, with 51% HCPs globally considering Covid-19 to be a severe threat.

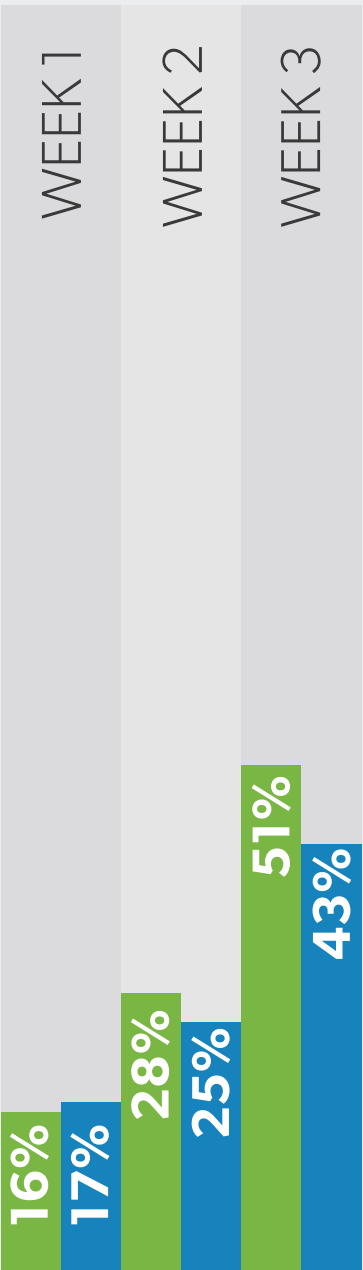
At a country level every market shows large increases, with the exception of Italy, which stays the same, at 70%, still the highest threat level across all markets. Spain is slightly behind at 66%, up from 27% last week. France also sees extreme increases, especially in patients, rising from 20% last week to 67% this week.

ALL - SEVERE THREAT

How serious of a threat do you think the 2019-nCoV is in your local community at this time?

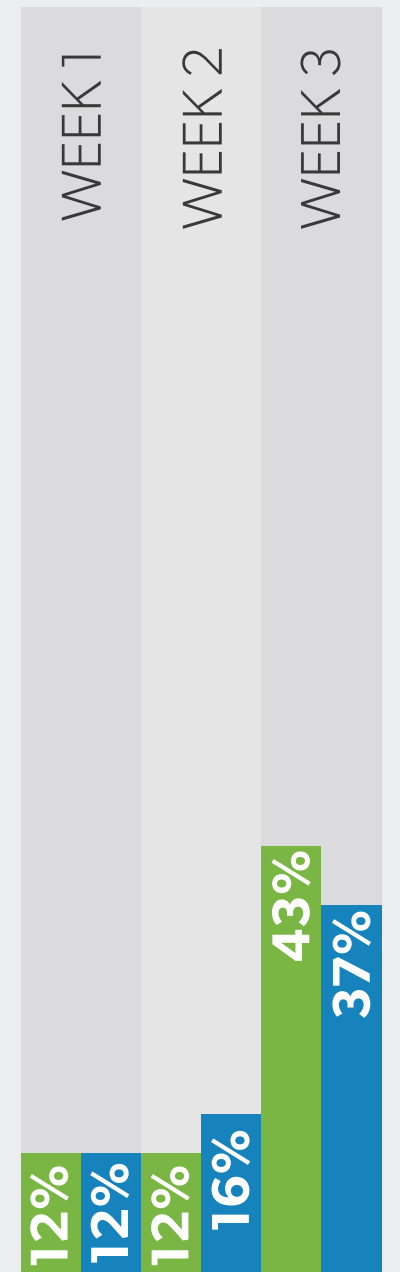
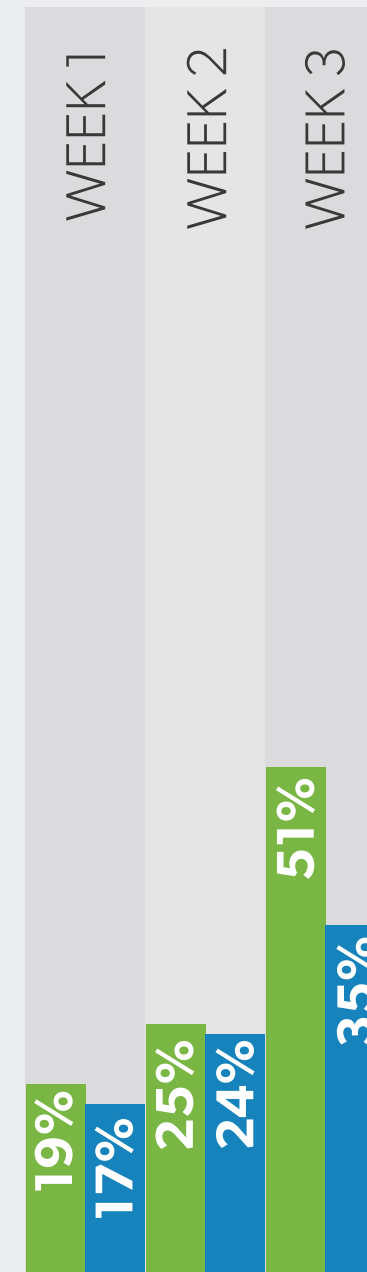
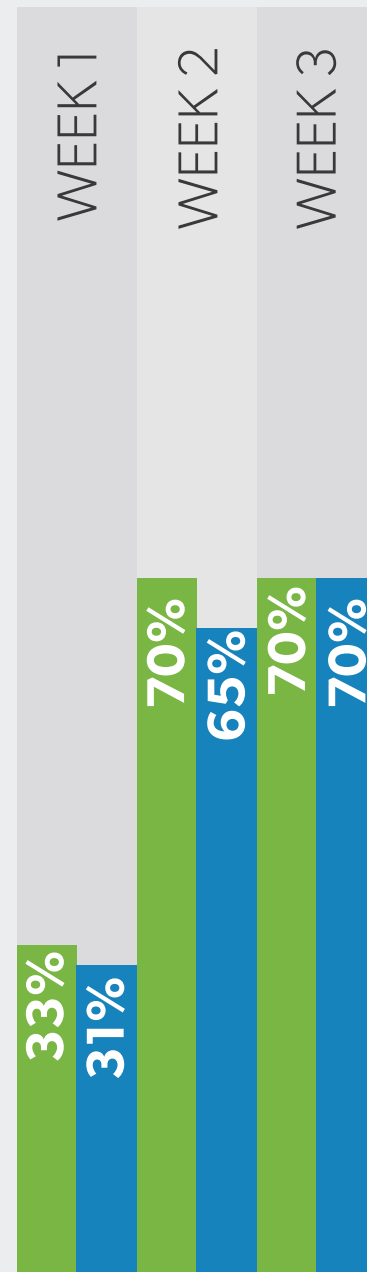
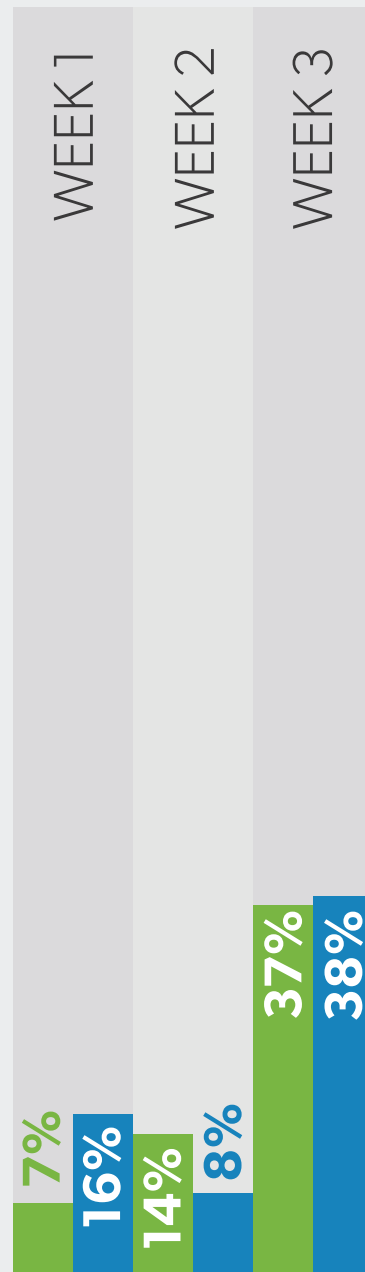
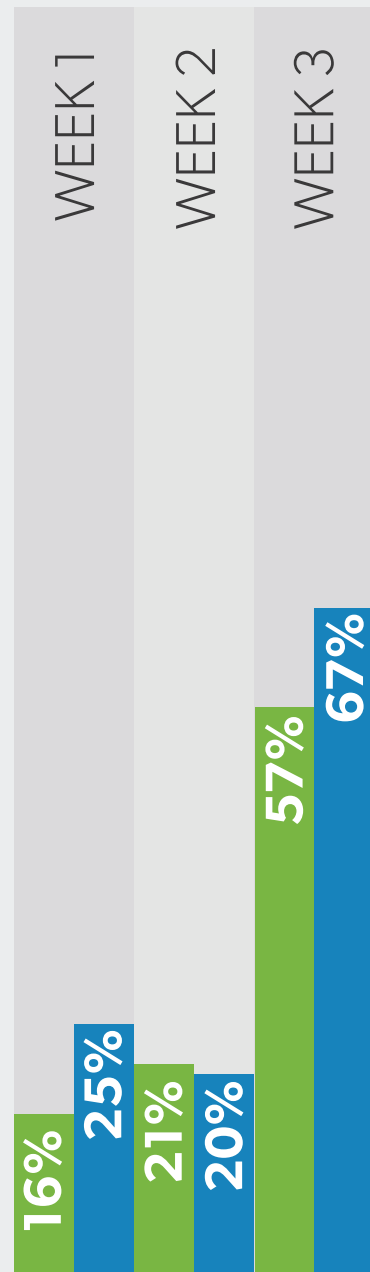
Charts show the percentage of respondents that consider the threat to be 'severe' at this time.

- HCPs
- Patients



How serious of a threat do you think the 2019-nCoV is in your local community at this time?

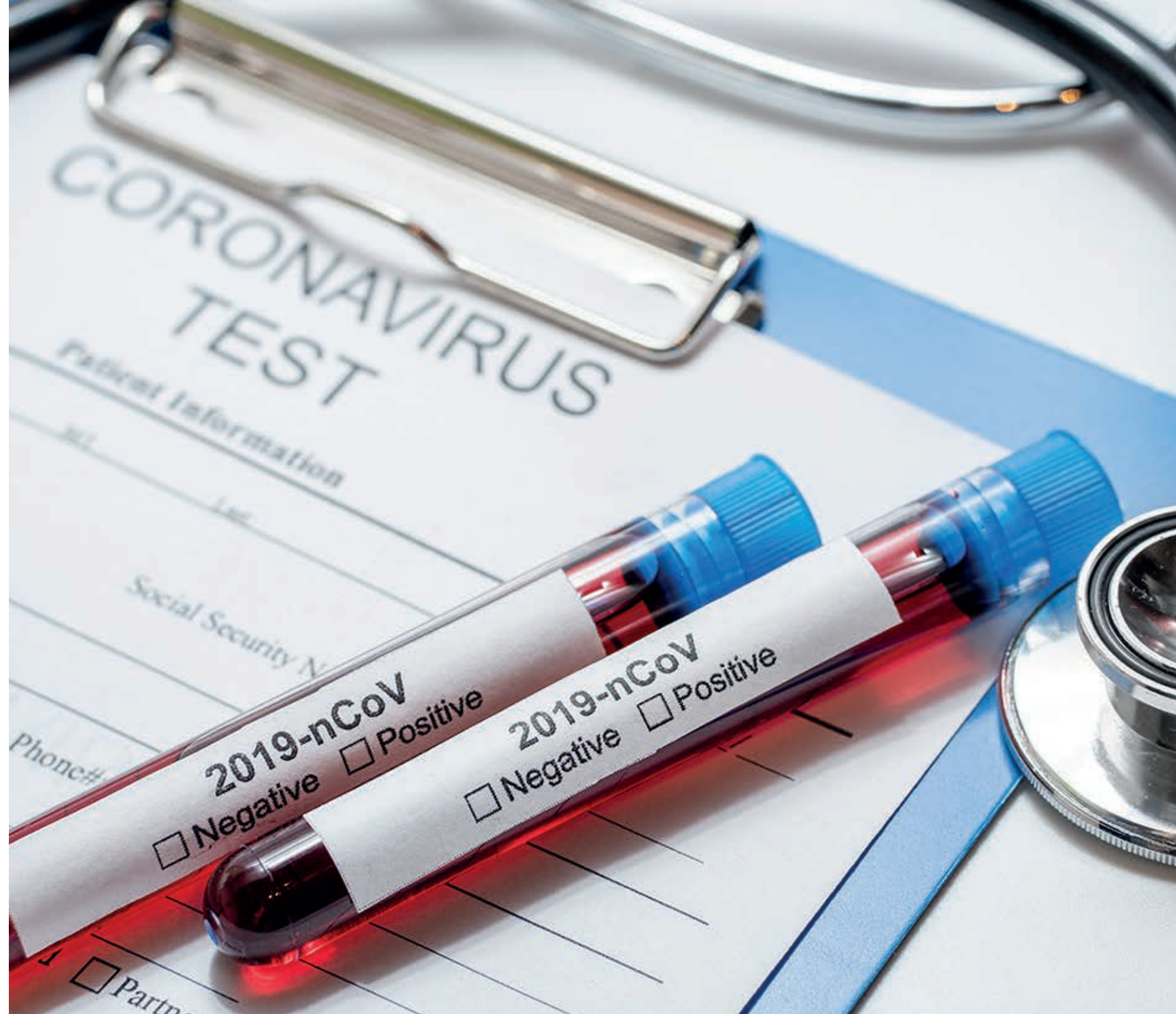
Charts show the percentage of respondents that consider the threat to be '**severe**' at this time.



HOW CAN WE CONTAIN COVID-19?

Whilst government policies around containment measures evolve, the data continues to show increasing support for the more drastic approaches. This is particularly the case in Italy where HCPs are seeing the benefit of those policies in practice.

As schools close across the majority of markets support for this has increased to 69%, from just 21% two weeks ago. Curfews are now supported by 35% respondents, and quarantines by 76%. Interestingly, support for protective equipment has increased steadily, week-on-week, perhaps as shortages are revealed. 72% support the suspension of international travel, a measure that has not yet been put in place by some significant markets, including the UK and USA.



Which of the following do you feel would be most effective to contain the spreading of the 2019-nCoV?

										
	Closing businesses and schools	Curfews	Vaccinations	Quarantines	Information	Using protective equipment	Halting public transportation	Cancelling events	Suspending international travel	Hand hygiene
WEEK 1	21%	4%	41%	51%	71%	46%	11%	41%	41%	-
WEEK 2	33%	12%	36%	60%	70%	54%	22%	57%	52%	76%
WEEK 3	69%	35%	47%	76%	74%	68%	44%	79%	72%	88%

 HCPs

STAYING UP-TO-DATE: MEDIA COVERAGE

Concern over media coverage continues to drop across all markets - down to 59% of HCPs this week, from 71% in week one. Now only 14% consider the coverage to be 'alarmist and unnecessary', half of week one's 32%.

28% HCPs now consider it to be 'fair and balanced' and this follows the trend, identified last week, of more responsible reporting of the pandemic.



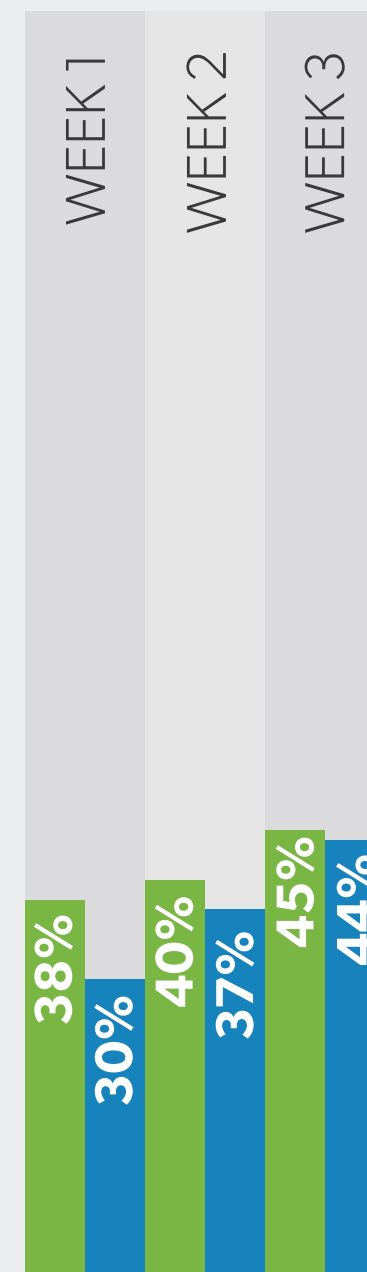
How do you feel about media coverage of 2019-nCoV in your country?

▶ HCPs
▶ Patients

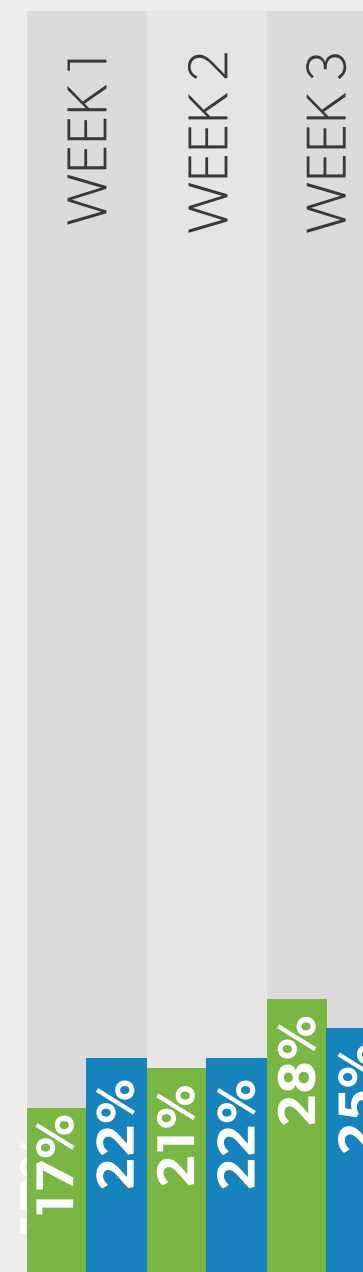
Alarmist and unnecessary



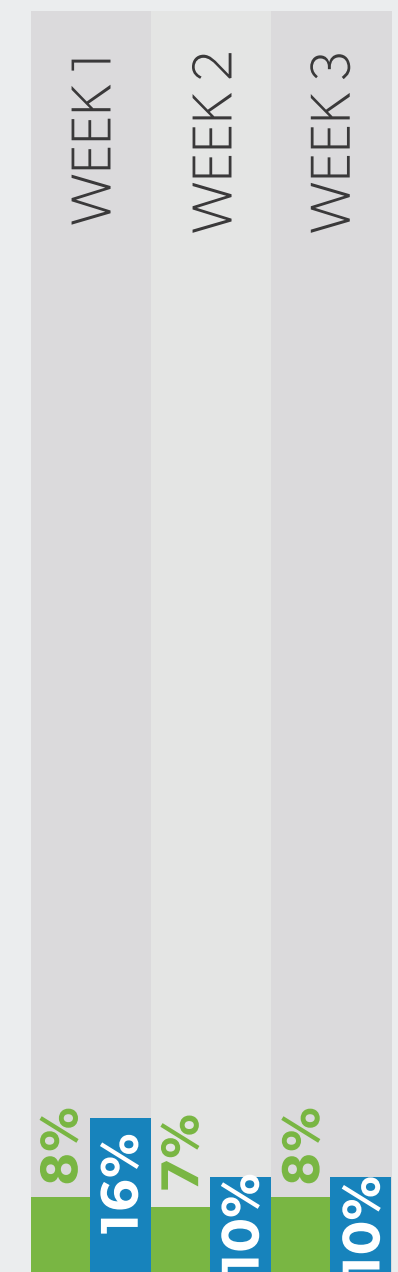
Overwhelming and/or conflicting information



Fair and balanced



Under-reporting on usable information



STAYING UP-TO-DATE: OFFICIAL INFORMATION

96% HCPs are now checking official information on Covid-19 at least daily, compared to 87% last week, and 73% in week one.

The number of HCPs checking information multiple times a day is now at over half (53%) versus 21% in week one. Last week, 22% of US doctors were only checking for updates weekly or less frequently, this week that's dropped to 4%, with 57% now checking multiple times a day.



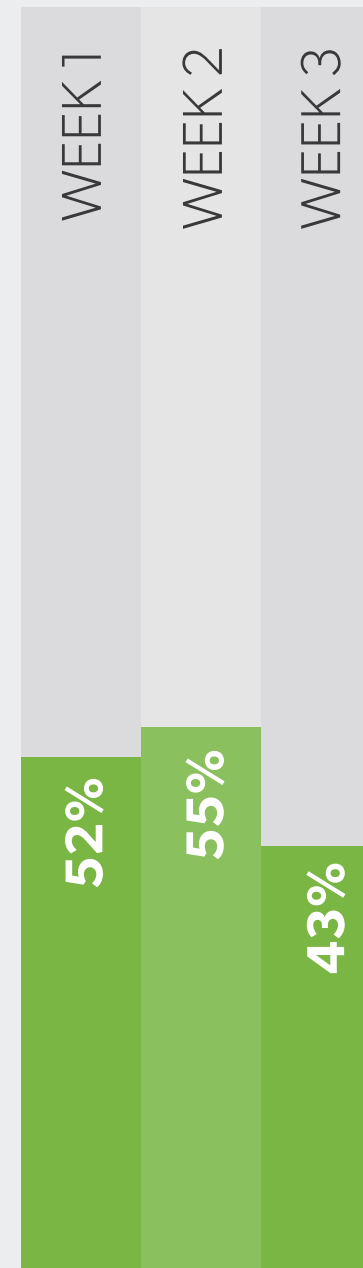
How often are you reviewing material and updates about 2019-nCoV provided by your local and national government health departments?

► HCPs

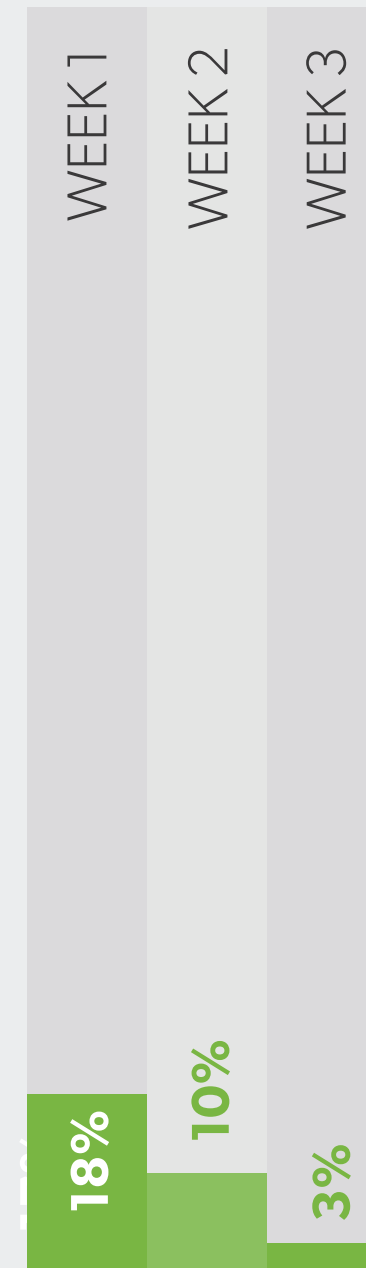
Multiple times a day



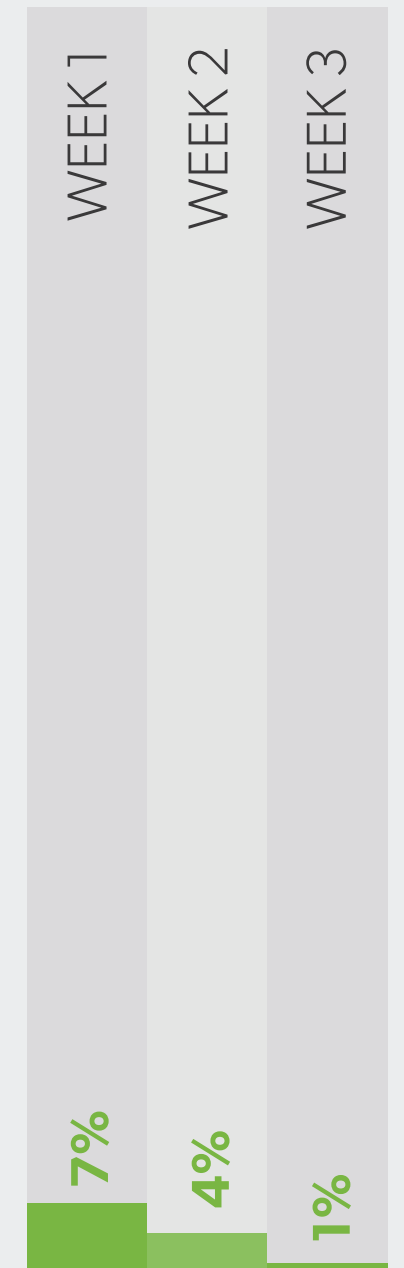
Daily



Weekly



Less than once a week





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