



CORONAVIRUS: PHYSICIAN AND PATIENT PERSPECTIVES WEEK 4

 M3 GLOBAL RESEARCH

CORONAVIRUS: PHYSICIAN AND PATIENT PERSPECTIVES

WEEK 4

The fourth week of this study reflects the opinions of 4,797 HCPs and 912 patients. There is no incentive available for participation, and the respondents represent a random sample of all M3 Global Research panel members.

As the UK joined the other countries in lockdown, the perceived threat of Covid-19 in local communities increased. By contrast, in Germany, with a comparatively low death rate and good availability of critical care beds, only 35% of HCP respondents consider Covid-19 to be a severe threat, and confidence in the government's plans is at 84%.

In the US, the picture is largely unchanged from last week, although the number of patients that think Covid-19 is a severe threat has increased by 10% to 47%.

▶ 4,797 HCPs

▶ 912 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
WEEK 4 24-26 March 2020	897 37	175 11	486 100	301 57	299 127	2,046 576	593 4	4,797 912

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

CONFIDENCE IN GOVERNMENT AND LOCAL PLANS

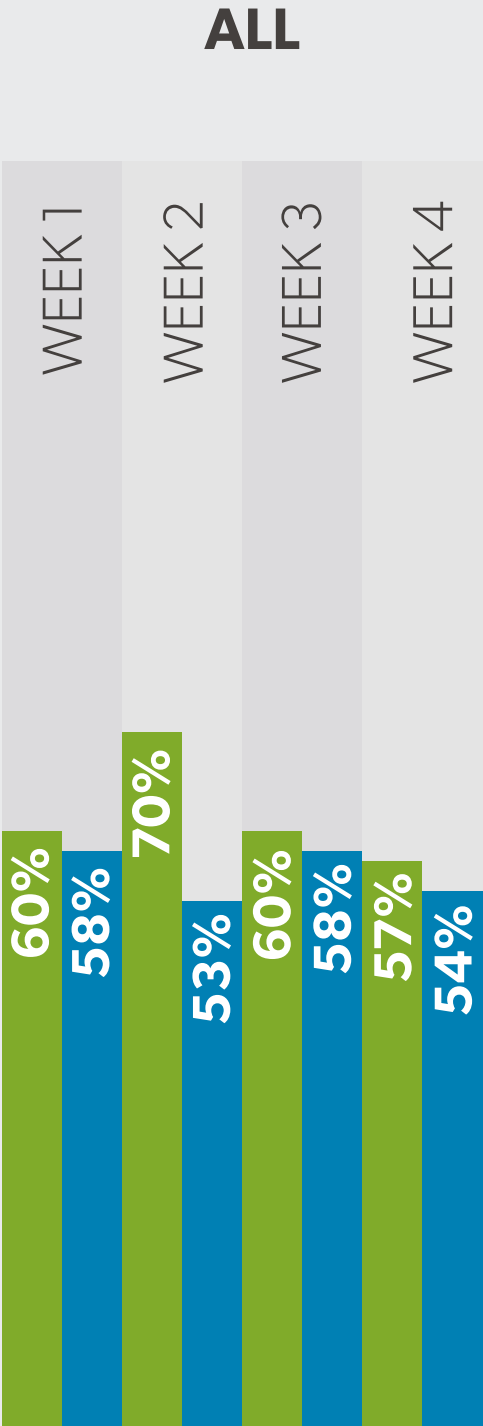
Overall, confidence in governments' preparedness has dropped slightly compared to last week, reflecting decreased confidence in most markets. HCP confidence in the French government's plans has dropped from 77% to 64%, but patient confidence has dropped from 83% to 49%. For the first time, Italian confidence has decreased, consistent with the high death rate. By contrast, in Germany, both patient and HCP confidence is increased - the only market where this is the case.

Confidence in local plans is mostly unchanged, with a 1% increase across patients and HCPs. The data largely reflects that seen in the question about governmental confidence. An exception is the UK, where HCPs have seen a massive escalation this week in planning at a local level, with the announcement of temporary hospitals and the opening of Covid 'hubs'. Confidence in local plans in the UK is up from 37% last week, to 54%.

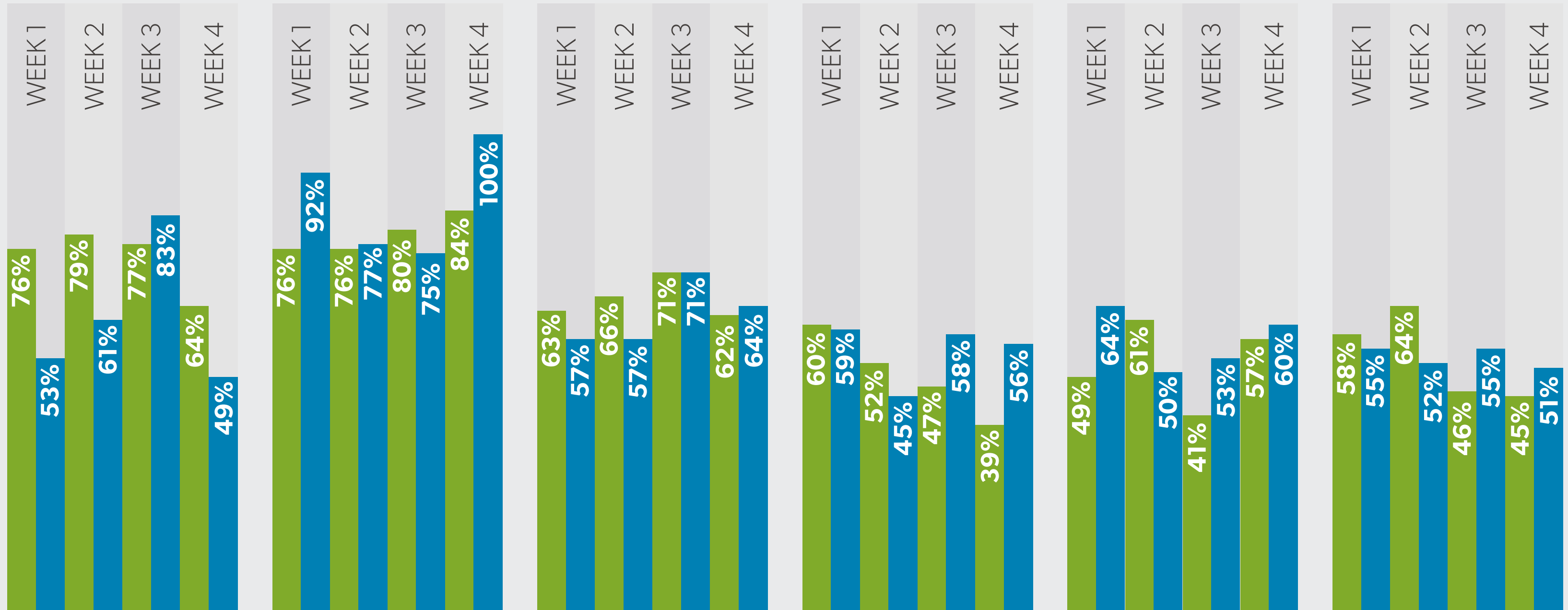
In terms of preparedness at a hospital-level, the picture largely echoes that of last week, although Italy has seen a small decrease, with the UK and Germany seeing increased confidence.

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

- HCPs
- Patients



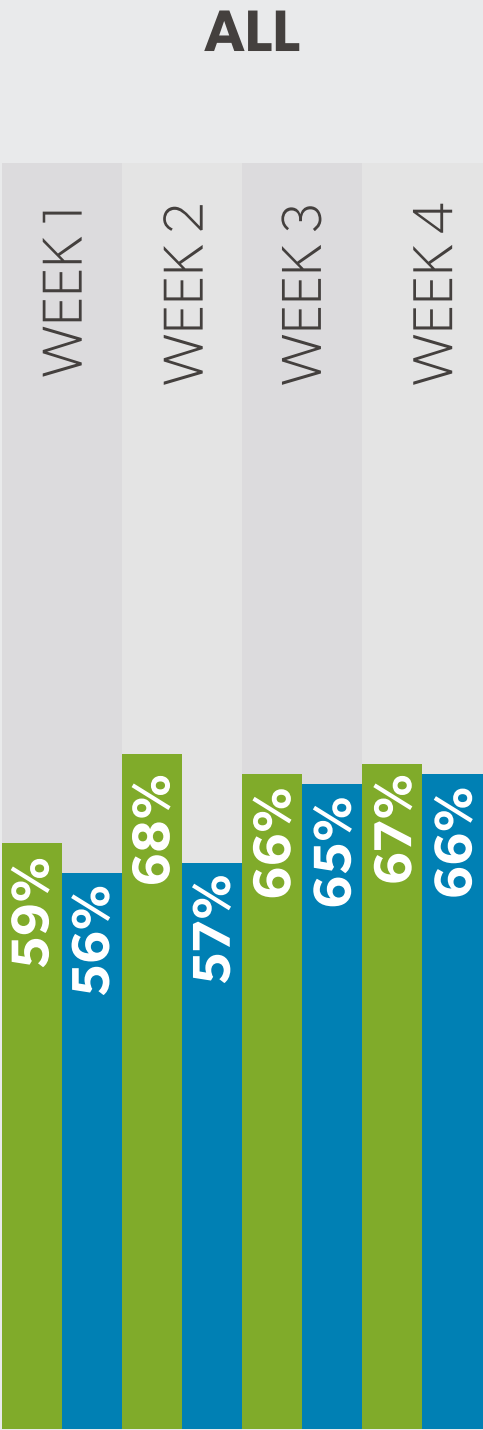
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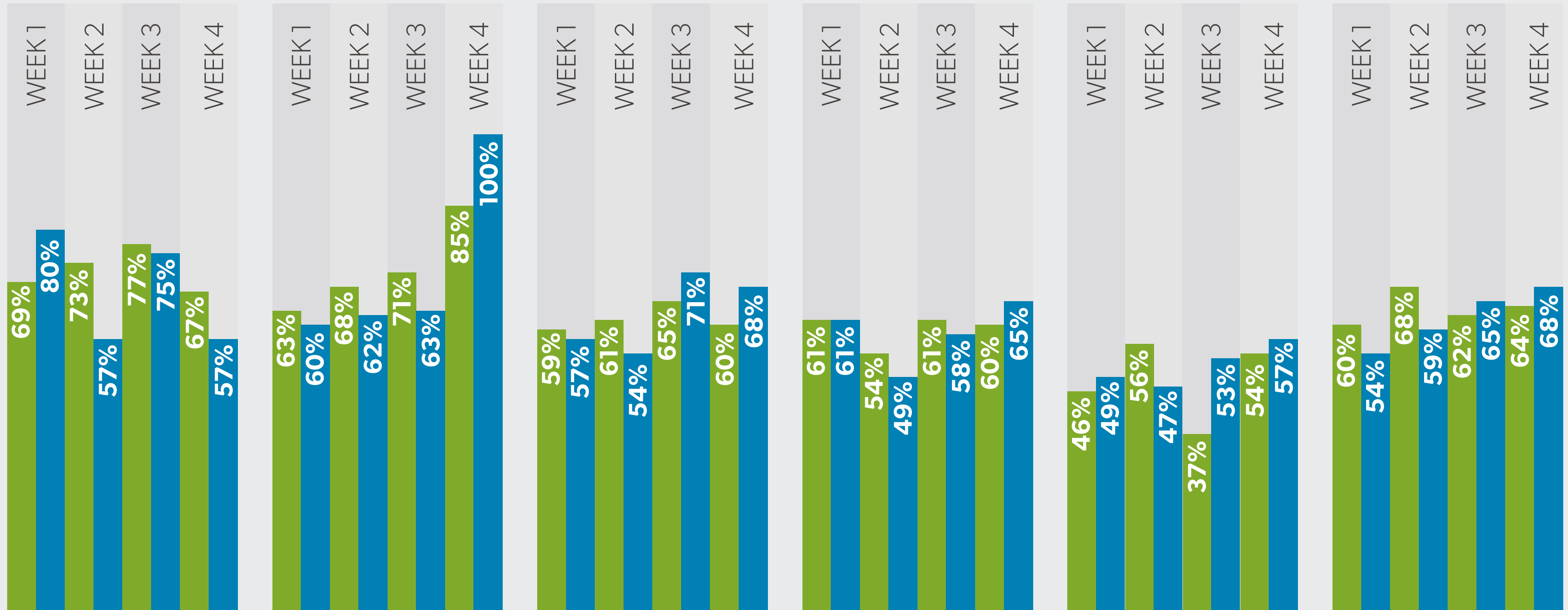


What is your level of confidence in the local plans in place to contain the spread of 2019-nCoV in your community?

- HCPs
- Patients



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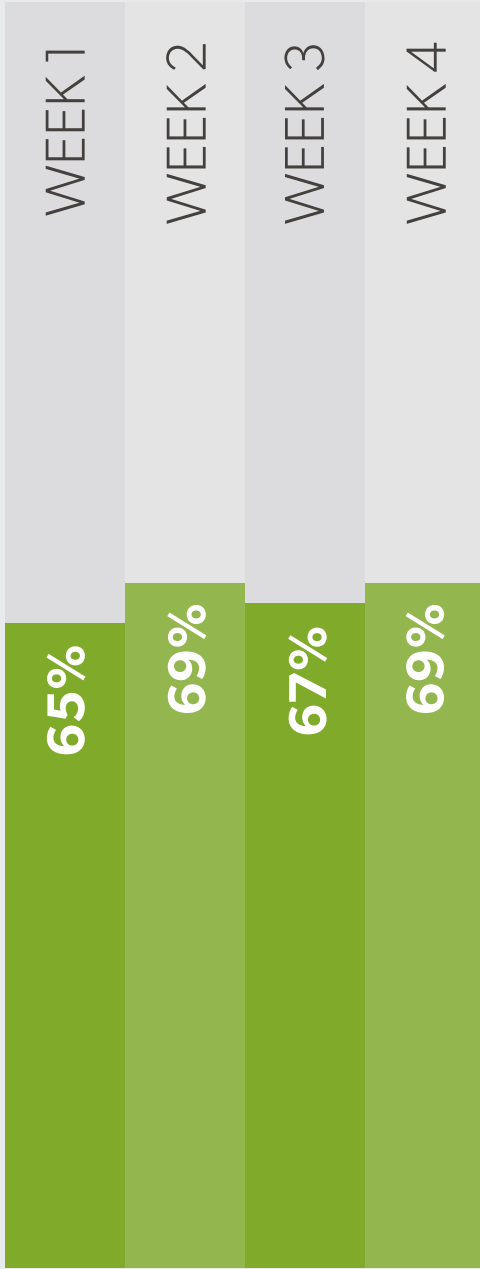




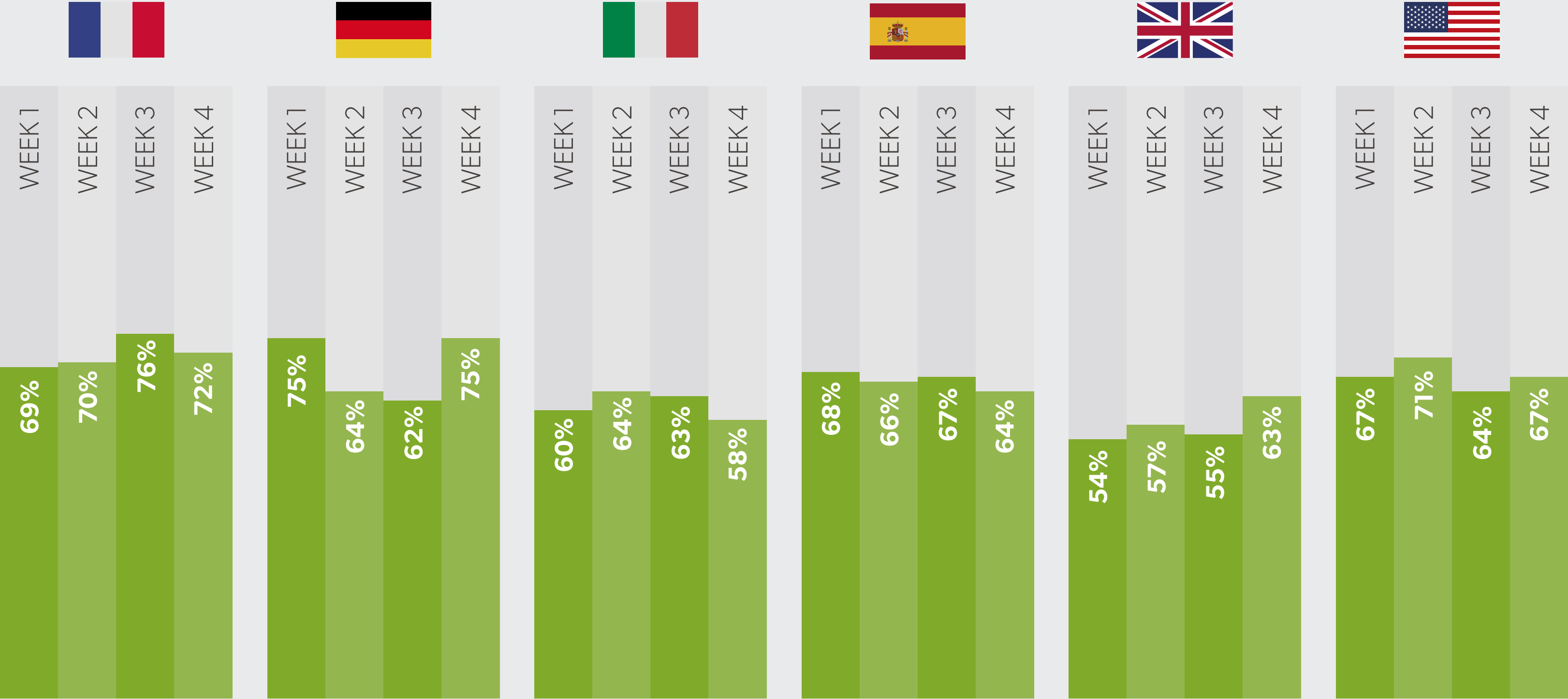
How prepared do you think your facility or organization is to handle a severe outbreak of a virus such as 2019-nCoV?

 **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?

Unsurprisingly, given the rapid increase of cases in the markets surveyed, the perceived threat level of Covid-19 continues to increase, with the number of HCPs considering it a severe threat at 54% vs 51% last week. The patient increase is much more distinct though, up 10% from last week.

At a country-level there are some significant changes. Whereas France and Spain have seen small increases, UK HCPs' perceived threat level has increased from 51% to 69% in a week that has seen 'lockdown' introduced across the UK.

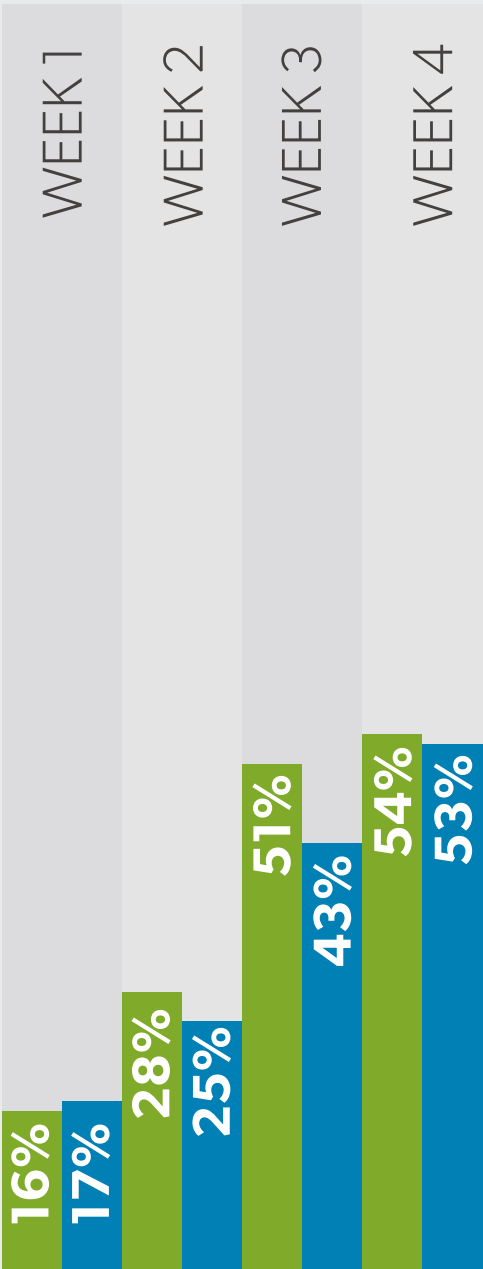
Germany and Italy have seen the first decreases, for very different reasons. Germany remains by far the lowest in terms of concern, with just over one-third (35%) of respondents considering Covid-19 a severe threat. The only other country under 50% is the USA at 49%. In Italy, the perceived severity has dropped very slightly, reflecting optimism as the spread starts to slow.

ALL - SEVERE THREAT

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

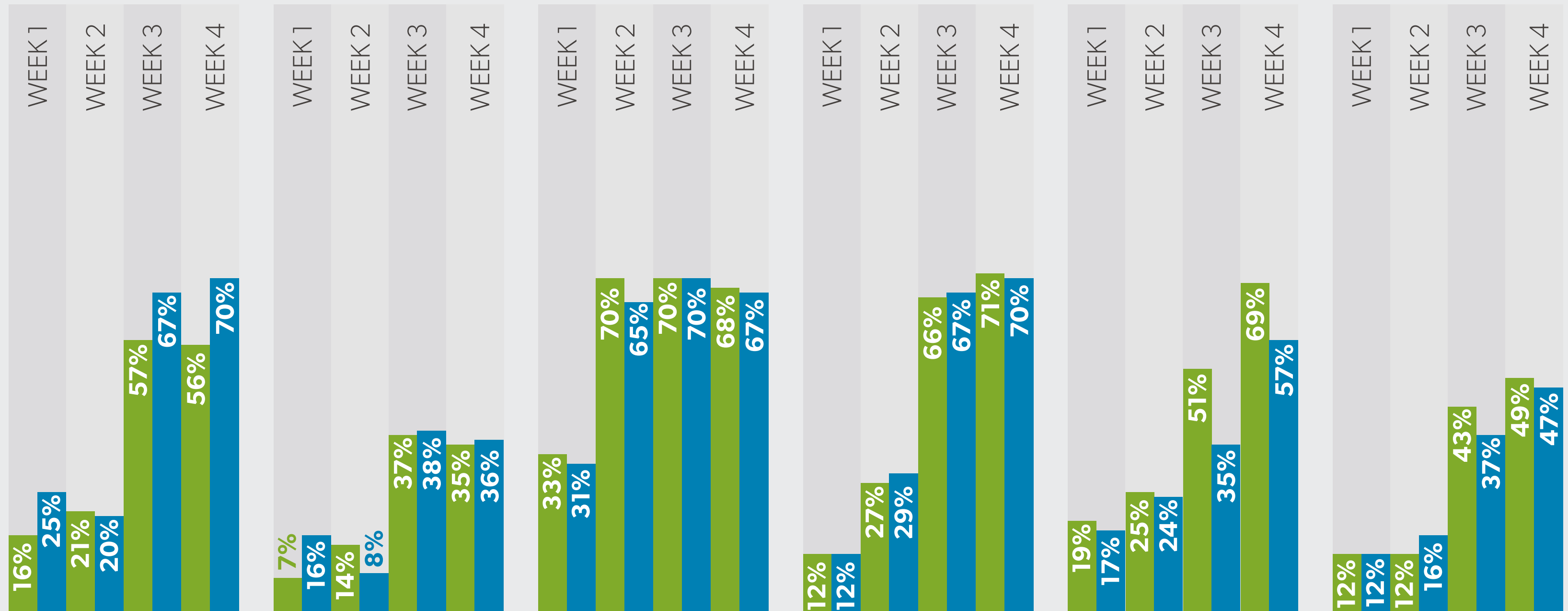
Charts show the percentage of respondents that consider the threat to be 'severe' at this time.

- 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?

As the tougher containment measures become 'the new normal' in some markets, and countries new to lockdown get used to it, support for the majority of containment measures continues to grow, with 72% HCPs recommending closing businesses and schools.

Support for protective equipment has continued to grow over the four weeks of the study, now at 77%, reflecting the shortage of PPE and its importance for HCPs working on the frontline.

Less than half of respondents (46%) think that halting public transport would be an effective containment measure, although this increases to 58% in the UK, where there has been much debate over whether the London underground should be used.



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%
WEEK 4	72%	40%	49%	82%	72%	77%	46%	81%	76%	89%

 HCPs

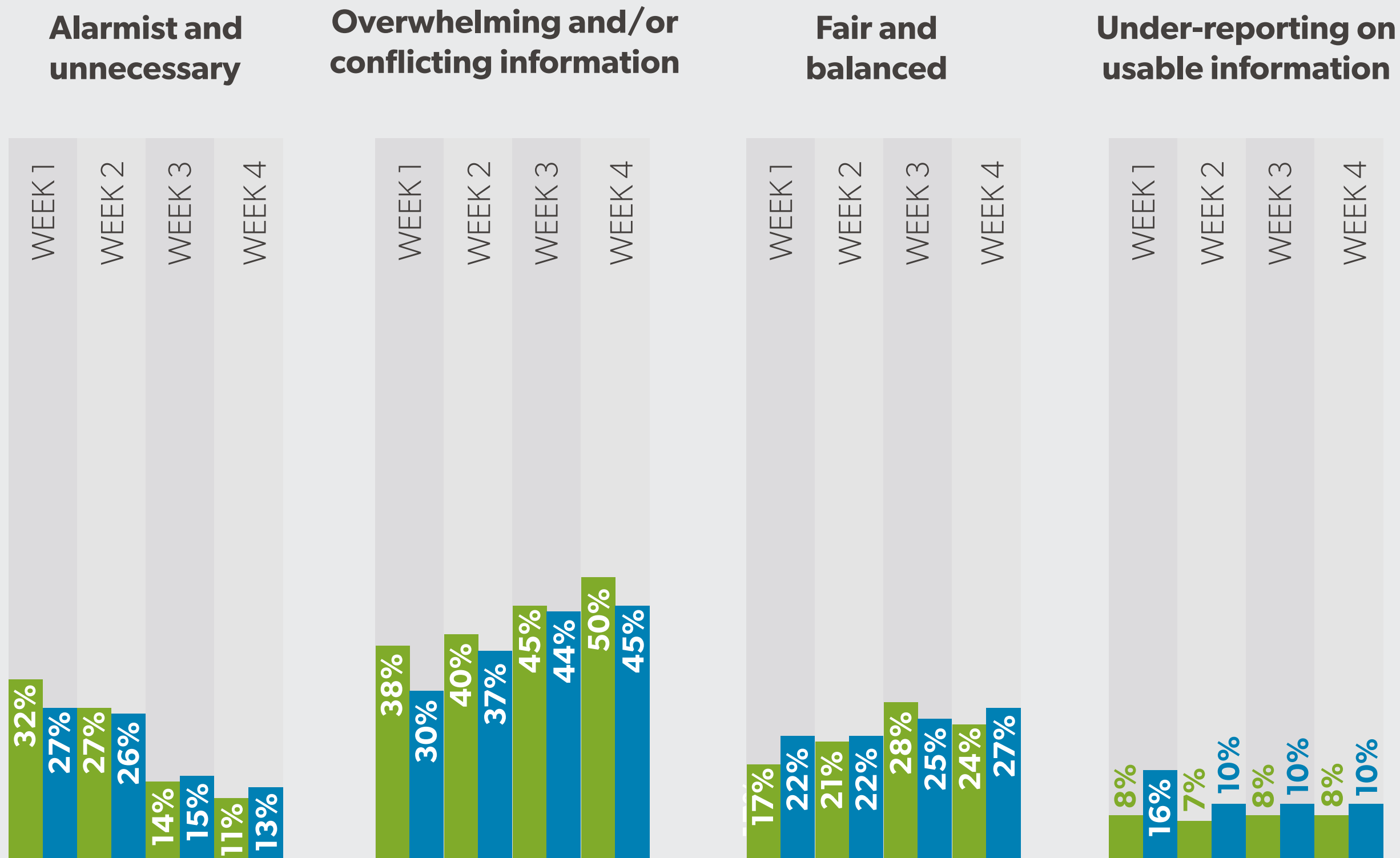
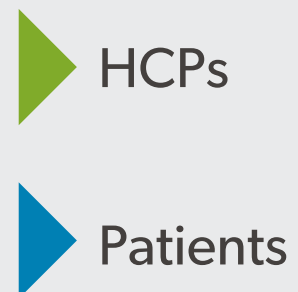
STAYING UP-TO-DATE: MEDIA COVERAGE

The number of respondents that consider media coverage to be 'alarmist and unnecessary' continues to drop, now at 11% compared to 32% in week one.

However, the sheer volume of media coverage is still an area of concern, with 50% HCPs and 45% patients agreeing that there is 'overwhelming and / or conflicting information'.



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



STAYING UP-TO-DATE: OFFICIAL INFORMATION

Interestingly, this week has seen a drop in the number of HCPs accessing official information multiple times a day, down from 53% last week, to 45%. However, 93% are still checking for new developments at least once a day, a decrease of 3% from last week.

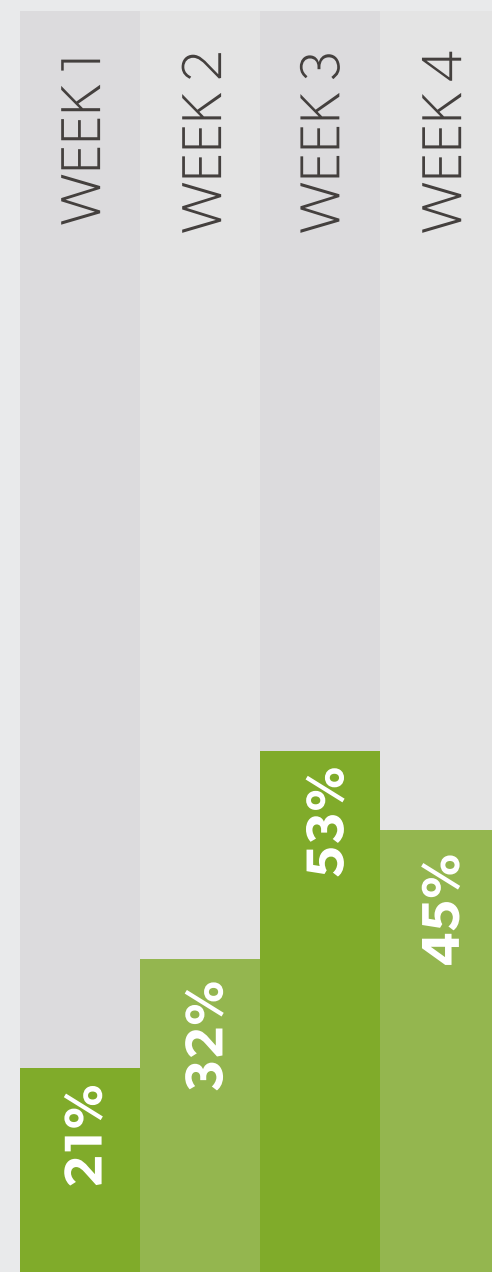
As clinical pressures increase and HCPs become more used to managing Covid-19 cases they are less reliant on constant communications, but also less able to check multiple times a day.



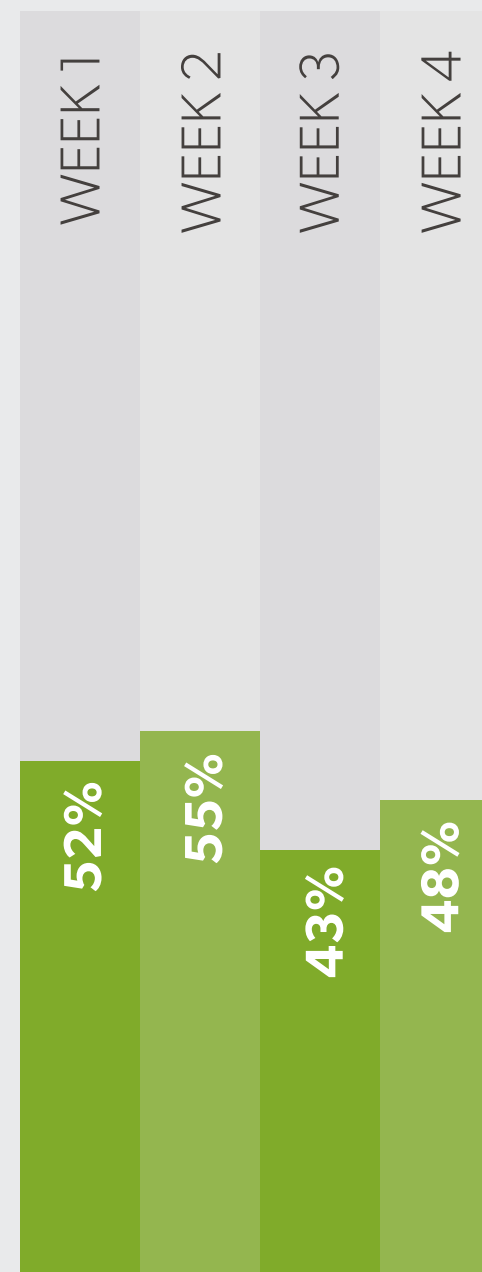
How often are you reviewing material and updates about 2019-nCoV provided by your local and national government health departments?

► HCPs

Multiple times a day



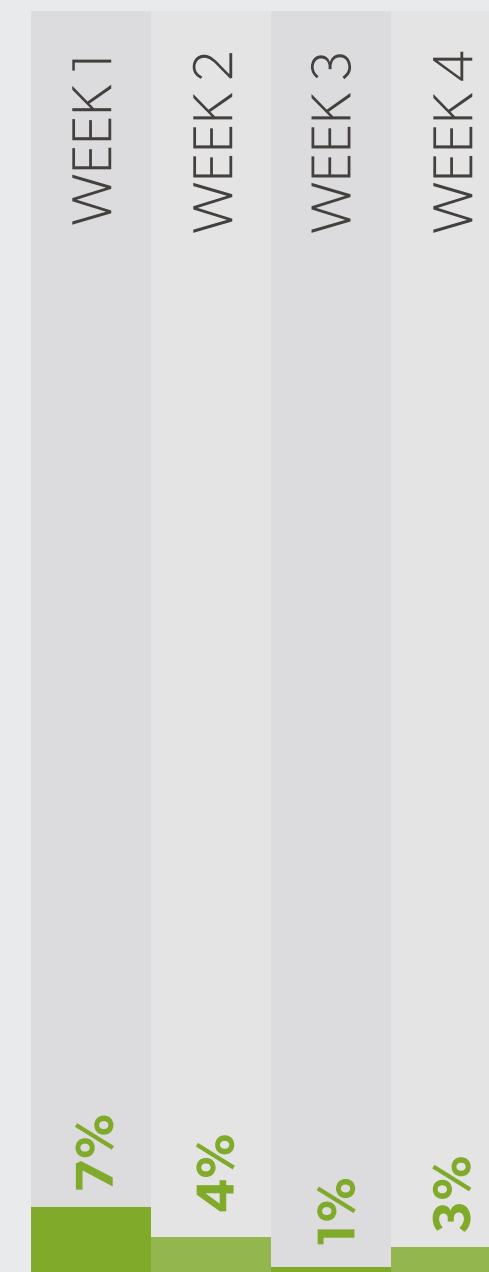
Daily



Weekly



Less than once a week





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