Breaking Results:

Sermo's COVID-19 Real Time Barometer Study

WAVE I: March 25 - 27

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Study overview

Methodology

Wave I of Sermo's COVID-19 Barometer Survey was launched on March 25 and fielded over three days. Physicians were not incentivized to participate in the study. The sample represents physicians registered with Sermo, a secure digital (online) platform designed for physician networking and anonymous survey research. The platform is exclusive to verified and licensed physicians.

Given the strategic importance of this topic, a total of **6,227** physicians across all specialties were sampled. The 30 countries included in the sample are United States, Canada, Argentina, Brazil, Mexico, Germany, Italy, UK, France, Spain, Belgium, Netherlands, Sweden, Turkey, Poland, Russia, Finland, Ireland, Switzerland, Austria, Denmark, Norway, Greece, Taiwan, Japan, South Korea, Australia, China, India and Hong Kong.

Results are reported for individual countries with a minimum sample size of 250. Such a sample size provides for point estimates with a +/- 6% precision at a 94% confidence level. In situations where the sample size for a country is below 250, countries are aggregated to provide a meaningful regional view. No weighting factor was applied to any individual sampling unit either in the selection of physicians who received an invite to participate or in any analysis conducted post-data collection.

Survey Instrument

The survey instrument was created via a collaboration between Sermo management, healthcare professionals, healthcare industry veterans, and market research professionals. The Wave I online survey is divided into four sections covering key COVID-19 issues: (1) **State of the Pandemic:** physicians' opinions on the state of the outbreak in their region/state and the effectiveness of governmental efforts (2) **Resource Needs:** COVID-19 information and resources physicians want from the healthcare industry (3) **Treatments:** physicians' experiences treating COVID-19 patients; insights into the treatments used and their safety and efficacy, and (4) **Impacts:** ethics related to wartime triaging and medical shortages; personal perspectives on the outbreak's emotional impact.

Prior to a full launch, the survey instrument was pre-tested online among a small sample of physicians on March 23, 2020. Based on the results of this pre-test adjustments were made to questionnaire wording and survey flow. The total survey length was approximately 22 minutes.

Data Analysis

Each respondent's personal identifiable information has been decoupled from the sample survey, and subsequent analysis, is completely anonymous. The data was processed and analyzed to create descriptive statistics summarizing physicians' attitudes about the various survey topics. All results that are cited as statistically significant were evaluated at a 95% confidence interval. In some instances – particularly were 4-point Likert scales were used to evaluate levels of concern or stress – scales were collapsed into high ("very concerned" and "somewhat concerned") versus low ("slightly concerned" and "not at all concerned") categories for comparison.

Summary of findings

Here are just a few key highlights from Wave I:

Treatments & Efficacy:

- 3 most commonly prescribed treatments amongst COVID-19 treaters are 56% analgesics, 41% Azithromycin, and 33% Hydroxychloroquine.

- Hydroxychloroquine usage amongst COVID-19 treaters is 72% in Spain, 49% in Italy, 41% in Brazil, 39% in Mexico, 28% in France, 23% in US, 17% in Germany, 16% in Canada, 13% in UK and 7% in Japan.

- Hydroxychloroquine was overall chosen as the most effective therapy from a list of 15 options (37% of COVID-19 treaters).
  - 75% in Spain, 53% Italy, 44% in China, 43% in Brazil, 29% in France, 23% in US and 13% in UK.

- The two most common treatment regimens for Hydroxychloroquine were:
  - (38%) 400mg twice daily on day one; 400 mg daily for 5 days.
  - (26%) 400mg twice daily on day one; 200mg twice daily for 4 days.

- Outside the US, Hydroxychloroquine was equally used for diagnosed patients with mild to severe symptoms whereas in the US it was most commonly used for high risk diagnosed patients.

- Globally, 19% of physicians prescribed or have seen Hydroxychloroquine prophylactically used for high risk patients, and 8% for low risk patients.

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Summary of findings, continued

Here are just a few key highlights from Wave I:

Second Wave of Outbreak:
- Second global outbreak is anticipated by 83% of global physicians, 90% of US physicians but only 50% of Chinese physicians.

Peak Timing & Restrictions:
- In the US, 63% of physicians recommend restrictions be lifted six or more weeks from now and 66% believe the peak is at least 3-4 weeks away.

Average Time for COVID-19 Test:
- On average tests in the US take 4-5 days, and in 10% of cases the wait is more than 7 days.
- 14% of US physicians and over 50% in all of Europe and Japan report getting test results in 24 hours; in China 73% of doctors get tests back in 24 hours, while 8% get tests back within the hour.

Prioritizing Patient Treatment in Case of Ventilator Shortage:
- In all countries except China, the top criteria for deciding who should receive a ventilator first was patients with the highest chance of recovery (47%) followed by those most ill and at highest risk of death (21%), then first responders (15%).
  - In China the priorities were reversed as the most ill and highest risk of death received ventilators.
  - First responders were more important in the US.
  - France, Japan, and Italy prioritized age.
  - Brazil and Russia prioritized higher risk patients.

Sample geographic distribution

Region	Value
US	2576
US - New York	257
US - California	278
Europe	2305
Italy	771
Spain	439
France	277
United Kingdom	281
Germany	300
China	245
Rest of world	1101
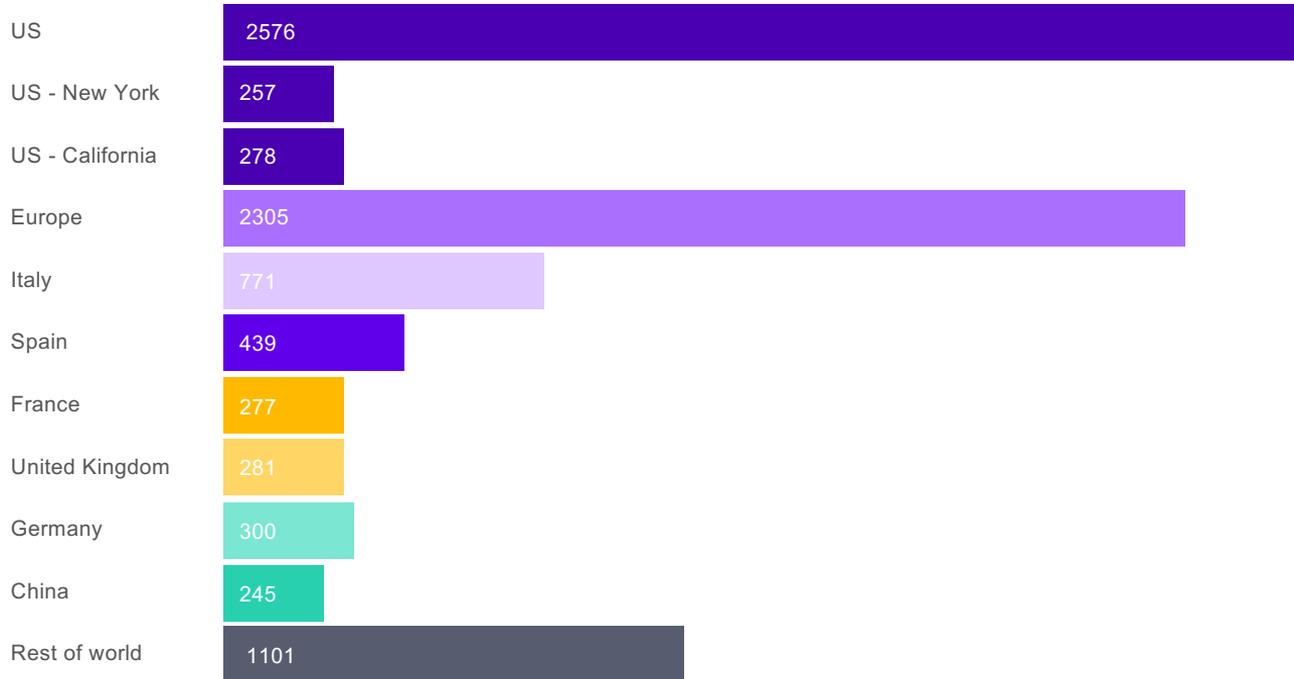
SECTION 1

Peak Timing & Restrictions

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When do you think that your region will pass the peak of the outbreak?

With the notable exception of China, most physicians believe that the peak of the outbreak is still ahead.

	Already reached	Not yet reached the peak	Don't Know

China (n=245)	90%	
Italy (n=771)	31%	67%
Europe (n=2305)	17%	82%
France (n=277)	16%	83%
Spain (n=439)	14%	84%
Rest of world (n=1101)	8%	91%
Germany (n=300)	7%	91%
US (n=2576)	4%	95%
US – California (n=278)	4%	96%
US – NY (n=257)	3%	97%
United Kingdom (n=281)	1%	97%
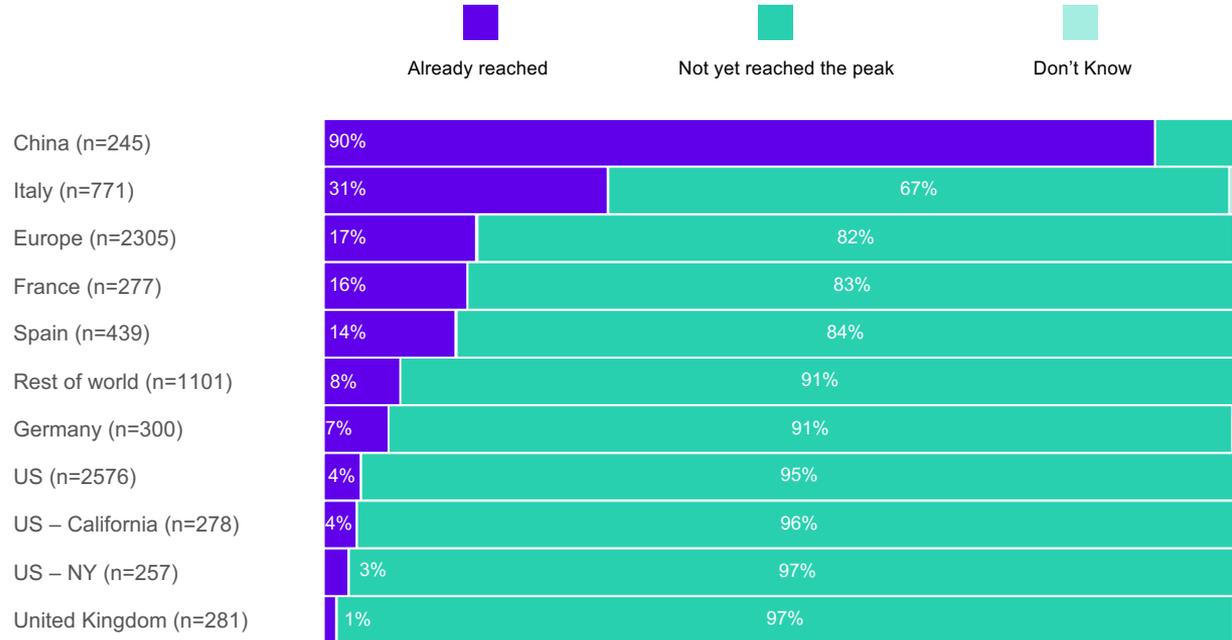
When do you think your region will reach the peak of the outbreak?

With the exception of China, the majority of physician expect that the peak of the outbreak is still 3-8 weeks away. 66% of US physicians believe the peak is at least 3-4 weeks away.

	US	NY	Europe	Italy and Spain	China	Rest of world
Not sure	5%	4%	3%	3%	3%	4%
Greater than 8 weeks from now	3%	2%	1%	1%	1%	3%
6-8 weeks from now	8%	9%	4%	1%	1%	6%
4-5 weeks from now	11%	10%	5%	3%		9%
3-4 weeks from now	39%	42%	23%	12%	3%	29%
1-2 weeks from now	27%	29%	35%	37%		31%
Within the next week	2%	2%	11%	18%		8%
Already passed	4%	3%	17%	25%	90%	10%
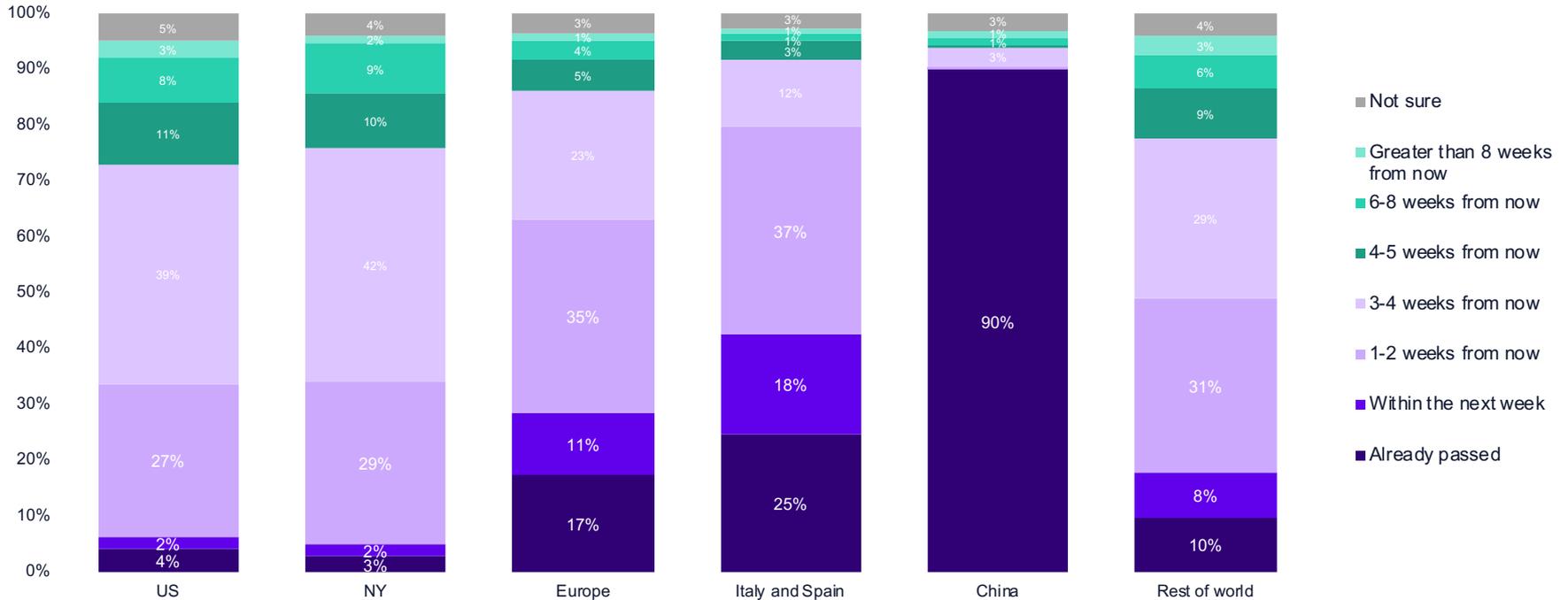
When do you expect your region will be able to lift current restrictions on movements?

With the exception of China, about half of physicians feel that their region will not be able to lift restrictions within the next six weeks.

Legend:
- Not sure
- Greater than 8 weeks from now
- 6-8 weeks from now
- 4-5 weeks from now
- 3-4 weeks from now
- 1-2 weeks from now
- Within the next week

US: Not sure 6%, Greater than 8 weeks 22%, 6-8 weeks 29%, 4-5 weeks 18%, 3-4 weeks 20%, Within next week 5%

NY: Not sure 7%, Greater than 8 weeks 25%, 6-8 weeks 29%, 4-5 weeks 17%, 3-4 weeks 18%, Within next week 3%

Europe: Not sure 4%, Greater than 8 weeks 20%, 6-8 weeks 27%, 4-5 weeks 20%, 3-4 weeks 19%, 1-2 weeks 6%, Within next week 4%

Italy and Spain: Not sure 3%, Greater than 8 weeks 15%, 6-8 weeks 27%, 4-5 weeks 21%, 3-4 weeks 25%, 1-2 weeks 7%, Within next week 4%

China: Not sure 3%, Greater than 8 weeks 5%, 6-8 weeks 7%, 4-5 weeks 6%, 3-4 weeks 31%, 1-2 weeks 28%, Within next week 20%

Rest of world: Not sure 6%, Greater than 8 weeks 22%, 6-8 weeks 23%, 4-5 weeks 16%, 3-4 weeks 23%, 1-2 weeks 7%, Within next week 4%

When would you recommend your region lift the current restrictions on movements?

Half of US physicians recommend current restrictions on movement stay in place for six weeks or more, even though 41% believe the peak is at least 3-4 weeks away.

Legend: ■ Within the next week ■ 1-2 weeks from now ■ 3-4 weeks from now ■ 4-5 weeks from now ■ 6-8 weeks from now ■ Greater than 8 weeks from now ■ Not sure

US: 2%, 6%, 16%, 14%, 25%, 25%, 13%
NY: 2%, 5%, 14%, 12%, 24%, 29%, 15%
Europe: 4%, 5%, 16%, 18%, 25%, 24%, 7%
Italy and Spain: 3%, 4%, 20%, 22%, 26%, 20%, 5%
**Rest of world:** 6%, 6%, 17%, 17%, 22%, 24%, 9%
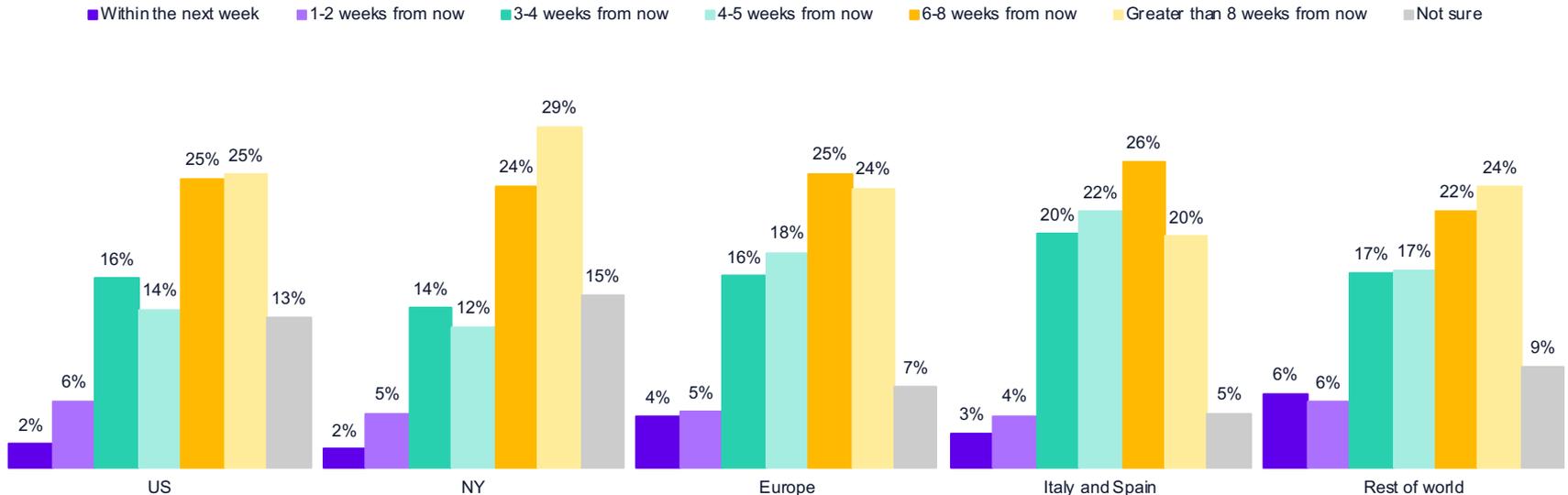
SECTION 2

Government Effectiveness

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Which of the following statements best reflects your opinion about your region's response to the COVID-19 outbreak?

Overall the majority of physicians perceive their region is appropriately balancing public health with economic impact.

62%
20%
18%
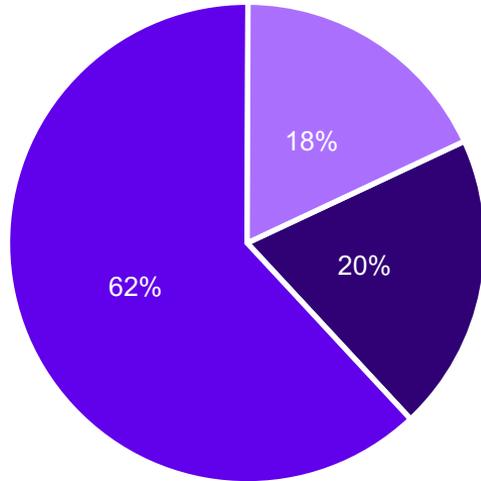
Physicians perceptions of how well their region is balancing public health vs economics varies widely by region. In Brazil MDs report too much weight on public health and in Mexico MDs report too much weight on economics.

| Region	Too much weight to public health	Weighting appropriately	Too much weight to economic impact
Brazil	41%	40%	18%
India	35%	59%	6%
China	31%	61%	8%
Europe	25%	61%	14%
Rest of world	20%	59%	20%
Mexico	18%	32%	50%
US	14%	68%	19%
USA	13%	72%	15%
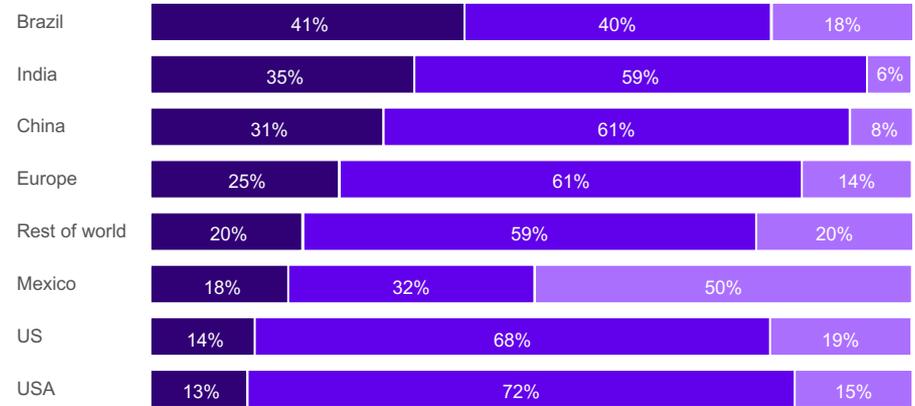
Our region is giving too much weight to public health concerns over economic impact

Our region is weighting public health concerns and economic impact appropriately

Our region is giving too much weight to economic impact over public health concerns

Question 24; N=6227

How effective have the actions taken by your local, regional and national health authorities been at reducing the spread of COVID-19?

The majority of physicians report that their local, regional and national health authorities have been at least somewhat effective. In China, most believe their authorities have been very effective.

	US	NY	Europe	Italy and Spain	China	Rest of world
Not at all effective	7%	8%	5%	7%		9%
Slightly effective	27%	30%	20%	22%	2%	25%
Somewhat effective	54%	53%	55%	55%	22%	50%
Very effective	12%	9%	21%	16%	76%	15%

Question 5; N=6227
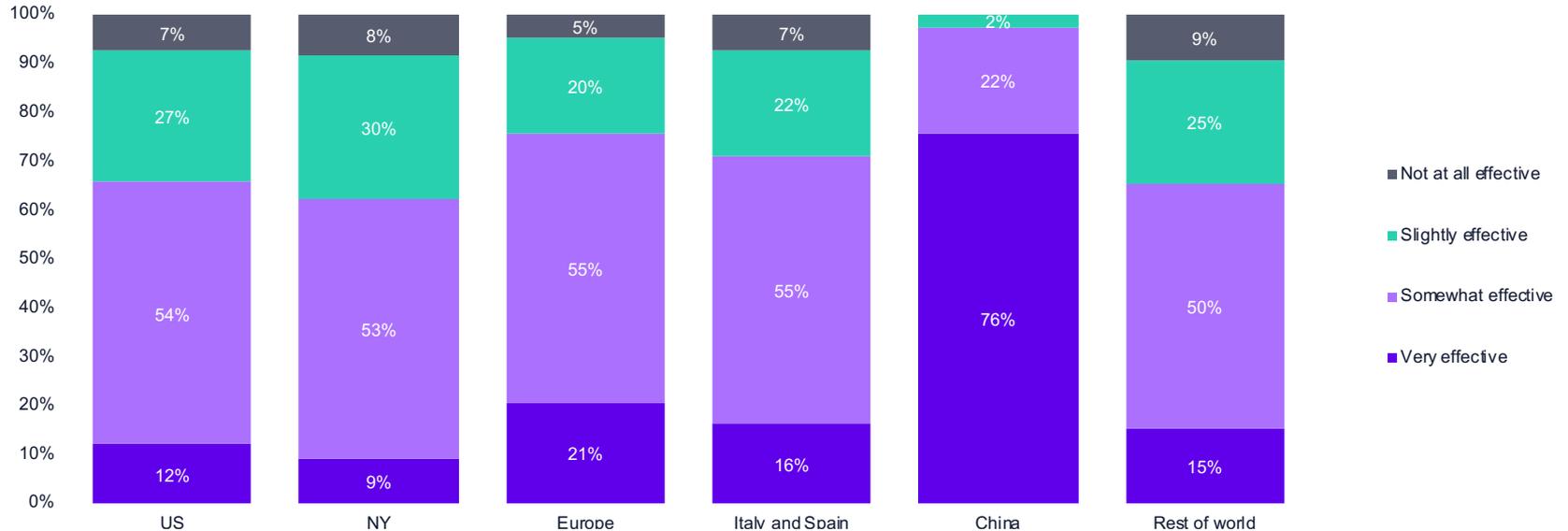
SECTION 3

Top 3 Physician Needs

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What are the three most critical needs that your region has to effectively deal with the COVID-19 outbreak?

Overall, personal protective equipment, COVID-19 testing kits and ventilators are the most critical needs.

■ 1st　■ 2nd　■ 3rd

Personal Protective Equipment (PPE) – masks, gloves, gowns, eye shields (76%)

| 35% | 26% | 14% |

COVID-19 testing kits (61%)

| 26% | 21% | 15% |

Ventilators (41%)

| 10% | 14% | 17% |
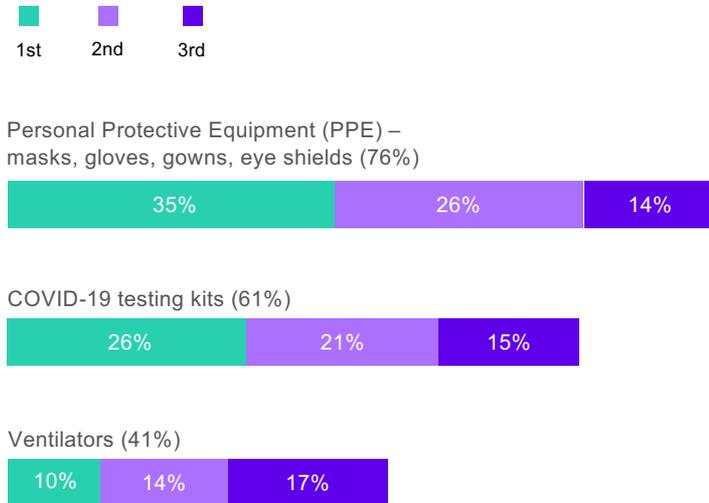
Additional needs include:

ICU Beds (33%)

Physicians (22%)

Isolation rooms (either inside or outside the hospital) (23%)

Rapid access to experimental drugs for treatment (15%)

Hand Sanitizing Gel (10%)

Telemedicine infrastructure (9%)

Non-Physician healthcare personnel (9%)

What are the three most critical needs that your region has to effectively deal with the COVID-19 outbreak?

Aside from PPE, the US in particular needs testing kits; NY specifically needs ventilators.

Legend:
- **Others**
- **Isolation rooms**
- **Ventilators**
- **COVID-19 testing kits**
- **Personal Protective Equipment (PPE)**

Data by region:

	US	NY	Europe	Italy and Spain	China	Rest of world
Others	19%	21%	31%	28%	31%	24%
Isolation rooms	2%	1%	5%	5%	17%	7%
Ventilators	9%	22%	12%	14%	2%	9%
COVID-19 testing kits	33%	21%	18%	17%	16%	26%
Personal Protective Equipment (PPE)	37%	35%	34%	36%	35%	34%

Question 6; N=6227

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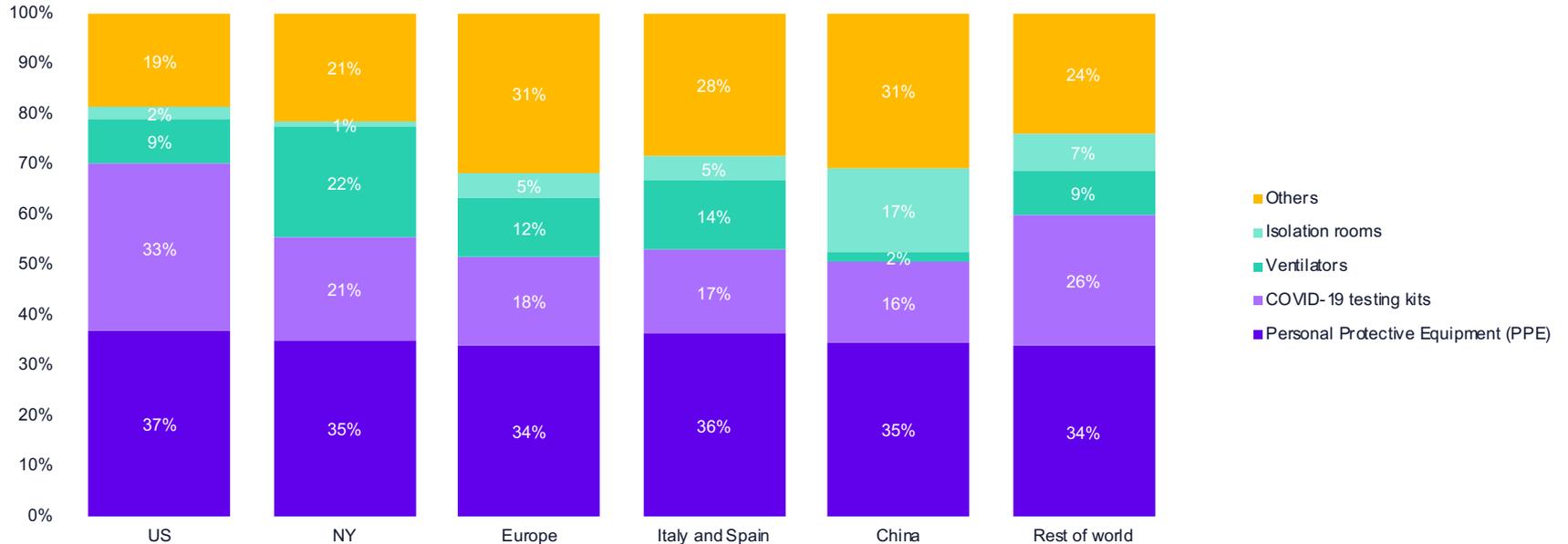
What are the top three COVID-19 topics you want more information about?

Physicians most want more information about efficacy of existing medications, new treatments
to prevent the rate of infection, and the availability of rapid tests.

| Topic	Percentage
Efficacy of existing medications at treating COVID-19	47%
New treatments to prevent the rate of infection	43%
When rapid tests will be available	41%
How healthcare workers are protecting themselves	33%
Treatment regimens for the severely ill	32%
Advice from experts in other countries that have dealt with the pandemic	28%
COVID-19 transmission information in your local community	28%
Guidelines on who should be tested	20%
Tips on how to convince patients to take social distancing seriously	18%
How to set-up and use a telemedicine platform	10%

Average Time for Getting a COVID-19 Test Result

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Which of the following activities have you personally done?

Half of physicians in this sample have personally ordered a COVID-19 test for a patient and/or been involved in care of patient who has tested positive.

47% — None of the above

35% — Been involved in the care of a patient who has tested positive for COVID-19

36% — Ordered a COVID-19 test for a patient
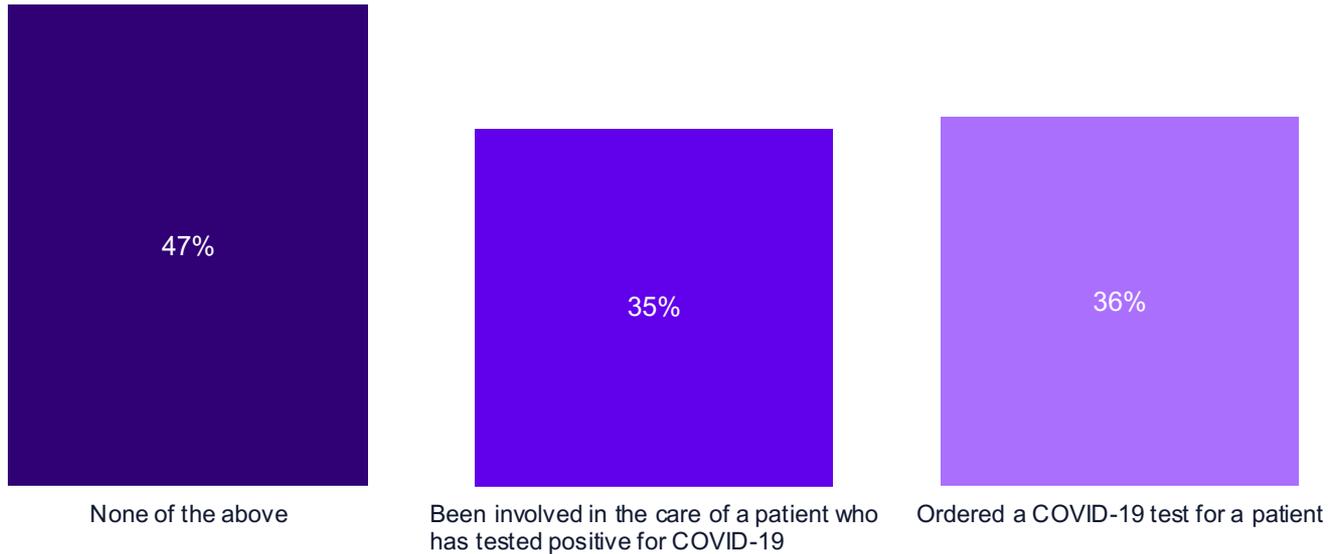
How long is the average time in your setting for getting back a COVID-19 test result?

85% of US physicians report testing takes 2-5 days or longer, while nearly half of international physicians report testing is completed within just 24 hours

	NA	Within an hour	Within 24 hours	2-3 days	4-5 days	6-7 days	More than 7 days
US	57%		6%	15%	12%	6%	5%
NY	47%		11%	19%	15%	5%	4%
Europe	36%	2%	30%	24%		6%	1%1%
Italy and Spain	28%	2%	36%	24%	6%	2%	2%
China	33%	7%	42%	14%		2%	2%
Rest of world	47%	2%	20%	19%	7%	3%	3%
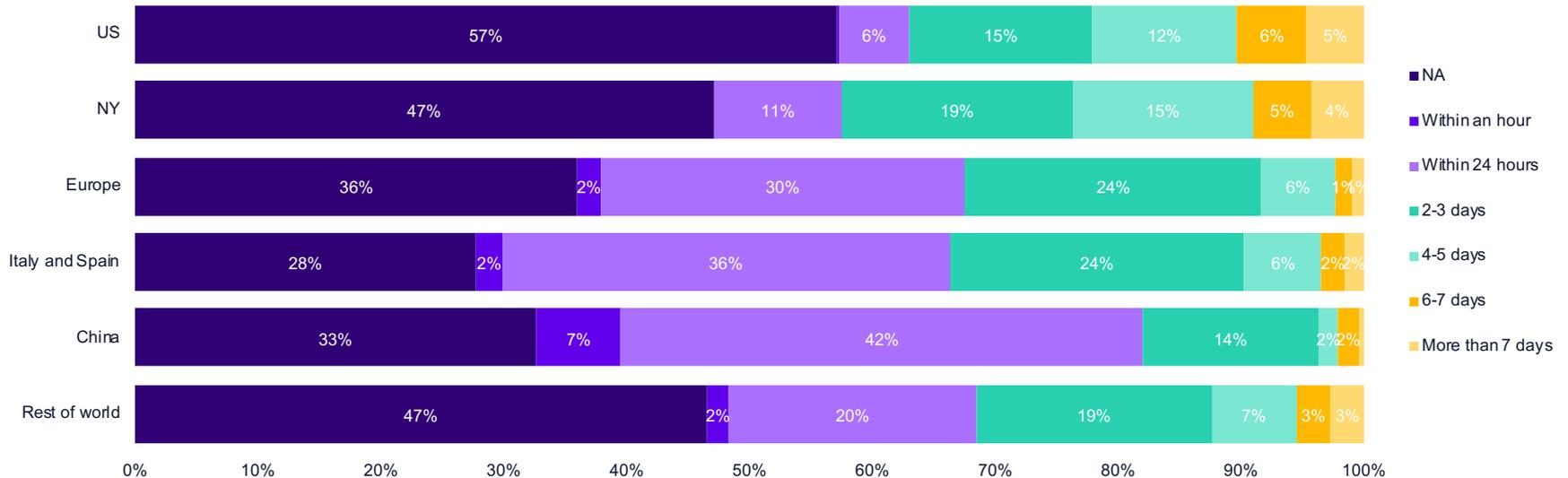
How would you describe the status of testing for COVID-19 in your region?

Physicians everywhere except China report the availability of testing is below the level that is needed. 91% of US physicians and 83% of international physicians say the status of testing is far to somewhat below what is needed.
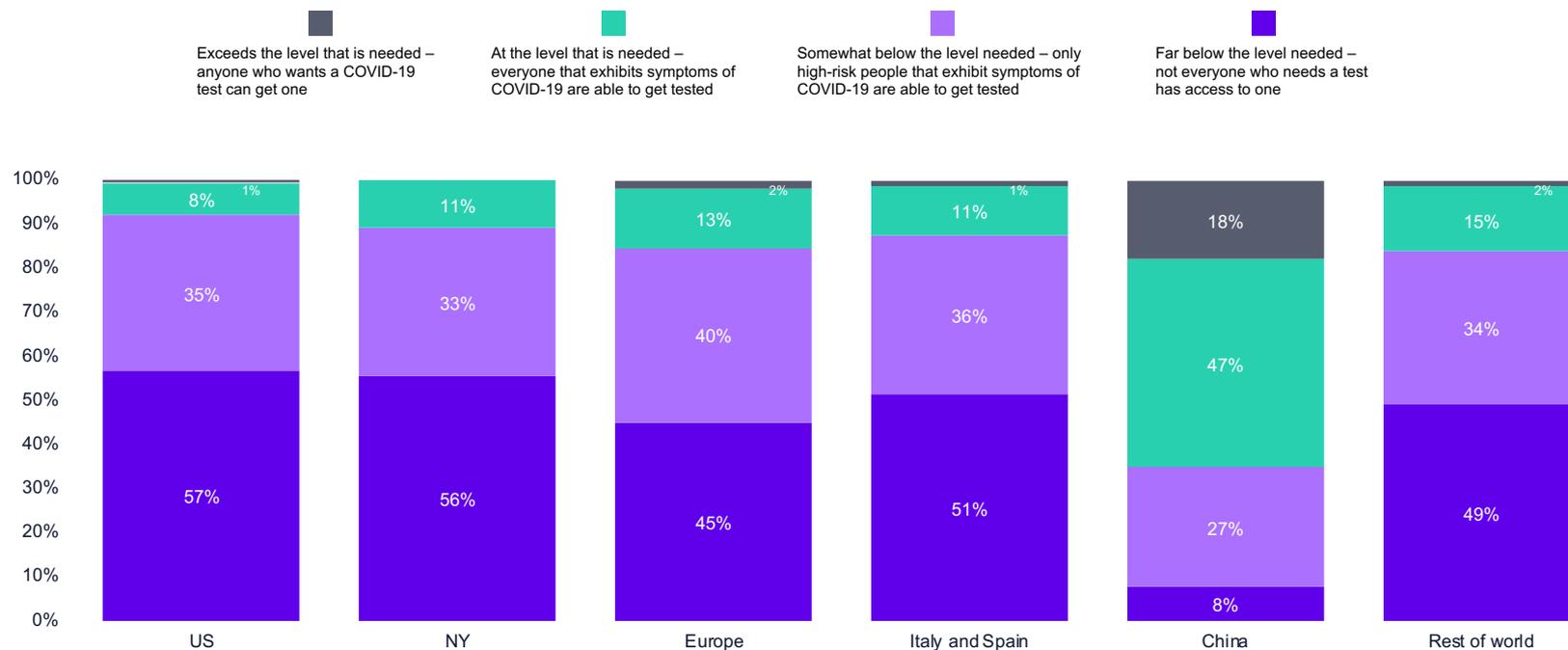
Legend:
- ⬛ Exceeds the level that is needed – anyone who wants a COVID-19 test can get one
- 🟩 At the level that is needed – everyone that exhibits symptoms of COVID-19 are able to get tested
- 🟪 Somewhat below the level needed – only high-risk people that exhibit symptoms of COVID-19 are able to get tested
- 🟦 Far below the level needed – not everyone who needs a test has access to one

Category	US	NY	Europe	Italy and Spain	China	Rest of world
Exceeds the level that is needed					18%	
At the level that is needed	8%	11%	13%	11%	47%	15%
Somewhat below the level needed	35%	33%	40%	36%	27%	34%
Far below the level needed	57%	56%	45%	51%	8%	49%
(grey small)	1%		2%	1%		2%

SECTION 5

Treatments
& Efficacy

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Please indicate which medications, if any, you have personally prescribed or have seen used in your setting to fight COVID-19?

3 most commonly prescribed treatments from a list of 15 options are analgesics (56%), Azithromycin (41%) and Hydroxychloroquine (33%).

	Analgesics (e.g., Paracetamol /...	Azithromycin or similar antibiotics	Hydroxychloroquine or Chloroquine	Cough medications	Expectorants (e.g., Mucinex)	Nothing
US	42%	31%	21%	29%	23%	44%
Brazil	63%	48%	35%	24%	13%	20%
Canada	56%	24%	15%	12%	15%	41%
Germany	55%	31%	16%	40%	27%	28%
Spain	81%	64%	61%	34%	31%	11%
France	63%	38%	20%	23%	12%	21%
UK	50%	26%	8%	17%	8%	44%
Italy	62%	53%	50%	26%	23%	17%
Japan	19%	36%	19%	33%	17%	29%
Mexico	73%	40%	38%	13%	17%	13%
NY	53%	38%	23%	33%	22%	33%
China	46%	42%	43%	50%	52%	7%
Rest of w…	57%	37%	36%	36%	25%	23%
Overall	56%	41%	33%	30%	24%	27%

Note: data provided is not meant to be the basis of a medical recommendation/treatment plan; if you think you have COVID-19 please follow local protocols and contact a medical professional.

Of the medications you have personally prescribed or have seen used, please indicate which ones are most effective.

37% of physicians who have treated COVID-19 patients believe Hydroxychloroquine is the most effective therapy of a list of 15 options.

	Overall (2171)	US (580)	NY (112)	Europe (827)	Italy & Spain (671)	China (109)	Rest of world (543)
Hydroxychloroquine or Chloroquine	37%	23%	25%	37%	62%	44%	55%
Azithromycin or similar antibiotics	32%	18%	25%	32%	45%	33%	48%
Nothing	32%	51%	42%	29%	16%	4%	18%
Analgesics (e.g., Paracetamol/Acetaminophen)	31%	21%	29%	34%	37%	20%	39%
Anti-HIV drugs (e.g. Lopinavir plus Ritonavir)	16%	5%	6%	15%	28%	42%	25%
Cough medications	13%	13%	15%	12%	8%	22%	11%
Compassionate use of experimental drugs (e.g. Remdisivir)	13%	10%	8%	12%	20%	35%	14%
Drugs used to treat flu (e.g., Oseltamivir)	12%	4%	11%	9%	10%	39%	19%
Expectorants (e.g., Mucinex)	10%	10%	9%	8%	8%	28%	10%
Interferon-beta	7%	1%	3%	3%	11%	41%	15%
Antihistamines/Decongestants	7%	7%	6%	5%	5%	17%	8%
Plasma from patients who have recovered from COVID-19	7%	3%	6%	4%	6%	48%	6%
Vitamin D	6%	4%	6%	6%	5%	12%	7%
Zinc tablets	5%	6%	10%	4%	2%	8%	4%
Glycopyrolate inhaler	3%	2%	3%	1%	1%	19%	3%

Note: data provided is not meant to be the basis of a medical recommendation/treatment plan; if you think you have COVID-19 please follow local protocols and contact a medical professional.

How have you prescribed hydroxychloroquine or seen it used in your setting in response to COVID-19?

Of global physicians who have treated a COVID-19 patient, 19% prescribed or have seen Hydroxychloroquine prophylactically used for high risk patients, and 8% for low risk patients.

To treat patients that have been diagnosed with COVID-19 and are experiencing severe symptoms

`57%`

To treat patients that have been diagnosed with COVID-19 and are experiencing mild symptoms

`45%`

As a prophylaxis for high risk patients

`19%`

To treat patients that have not been diagnosed with COVID-19 but are experiencing severe symptoms

`17%`

To treat patients that have not been diagnosed with COVID-19 but are experiencing mild symptoms

`16%`

As a prophylaxis for low risk patients

`8%`

Outside the US, Hydroxychloroquine was equally used for diagnosed patients with mild to severe symptoms whereas in the US it was most commonly used for high risk diagnosed patients.

Question 14; N=2573

Note: data provided is not meant to be the basis of a medical recommendation/treatment plan;
if you think you have COVID-19 please follow local protocols and contact a medical professional.

What hydroxychloroquine treatment regimens have you prescribed or have seen used in your setting?

The two most common treatment regimens for Hydroxychloroquine were:

- (38%) 400mg twice daily on day one; 400 mg daily for 5 days.
- (26%) 400mg twice daily on day one; 200mg twice daily for 4 days.

Dose of 400mg BID on day one (800mg total), then 400 mg daily for 5 days	38%
Dose of 400mg BID on day one (800mg total), then 200mg BID for 4 days	26%
Dose of 600 mg BID on day one (1,200mg total), then 400mg daily for 4 days	11%
Dose of 400mg BID on day one (800mg total), then 400mg once weekly for 3 weeks	10%
Dose of 400mg BID on day one (800mg total), then 400mg once weekly for 7 weeks	9%
Dose of 600mg per day for 10 days	8%
Other	11%

Note: data provided is not meant to be the basis of a medical recommendation/treatment plan; if you think you have COVID-19 please follow local protocols and contact a medical professional.
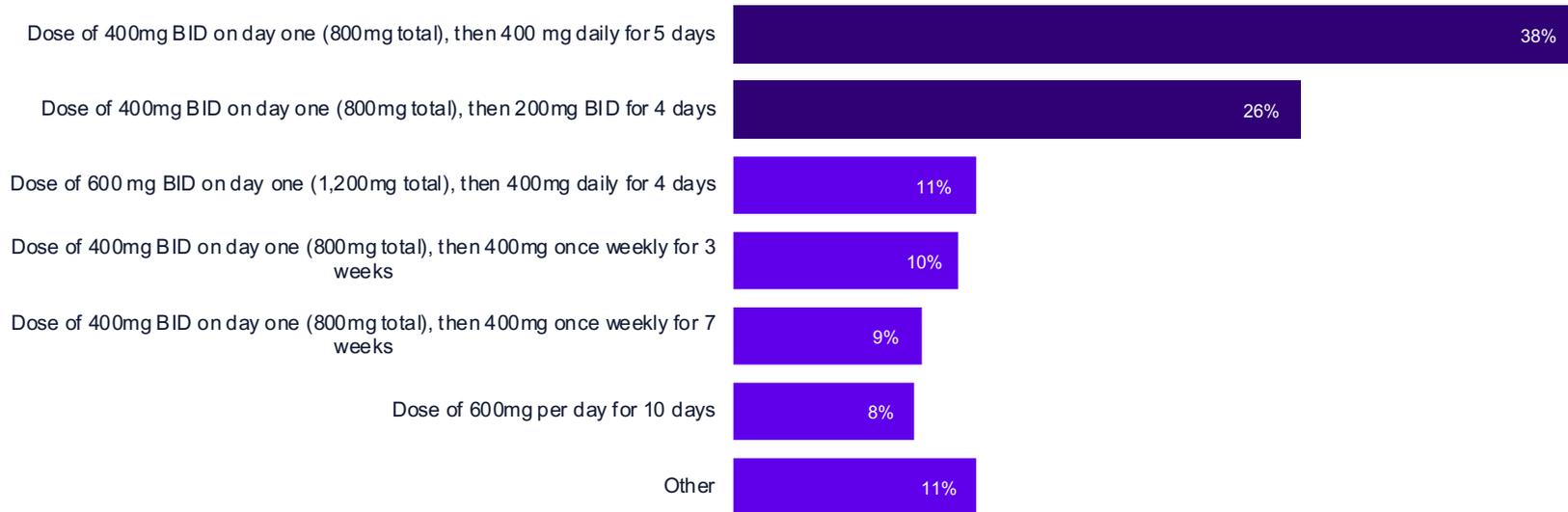
Prioritizing Patient Treatment in Case of Ventilator Shortage

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If COVID-19 results in a ventilator shortage, what do you personally believe should be the hierarchy of criteria for deciding which patients receive a ventilator?

In the event of a ventilator shortage, the top criteria for deciding who should receive a ventilator first was patients with the highest chance of recovery (47%) followed by those most ill and at highest risk of death (22%), then first responders (15%).
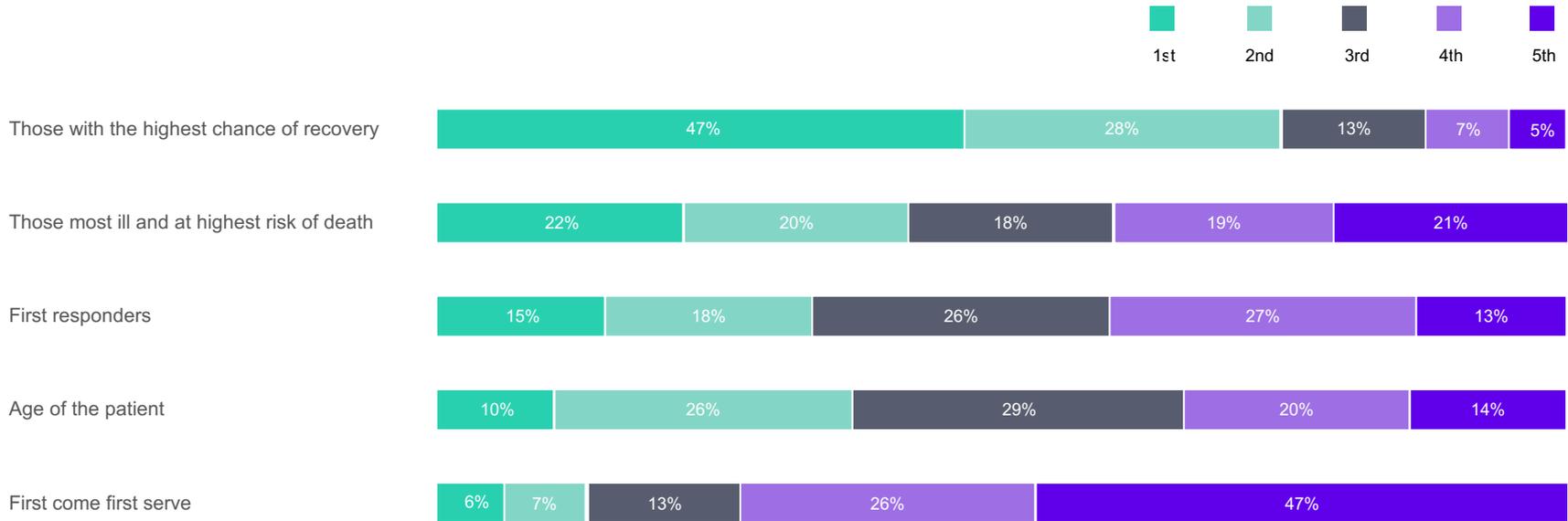
	1st	2nd	3rd	4th	5th

Those with the highest chance of recovery
47% | 28% | 13% | 7% | 5%

Those most ill and at highest risk of death
22% | 20% | 18% | 19% | 21%

First responders
15% | 18% | 26% | 27% | 13%

Age of the patient
10% | 26% | 29% | 20% | 14%

**First come first serve**
6% | 7% | 13% | 26% | 47%

If COVID-19 results in a ventilator shortage, what do you personally believe should be the hierarchy of criteria for deciding which patients receive a ventilator?

In China the priorities were reversed as the most ill and highest risk of death received ventilators.

First responders were more important in the US.

France, Japan, and Italy prioritized age.

Brazil and Russia prioritized higher risk patients.

Country	First responders	First come first serve	Age of the patient	Those most ill and at highest risk of death	Those with the highest chance of recovery
US	22%	5%	4%	21%	49%
Russia	3%	13%	13%	39%	32%
Japan	13%	9%	24%	25%	29%
Italy	13%	8%	19%	24%	37%
France	6%	6%	24%	21%	44%
China	13%	14%	8%	41%	24%
Brazil	9%	4%	12%	34%	40%
ROW	11%	5%	11%	18%	54%

■ First responders ■ First come first serve ■ Age of the patient ■ Those most ill and at highest risk of death ■ Those with the highest chance of recovery
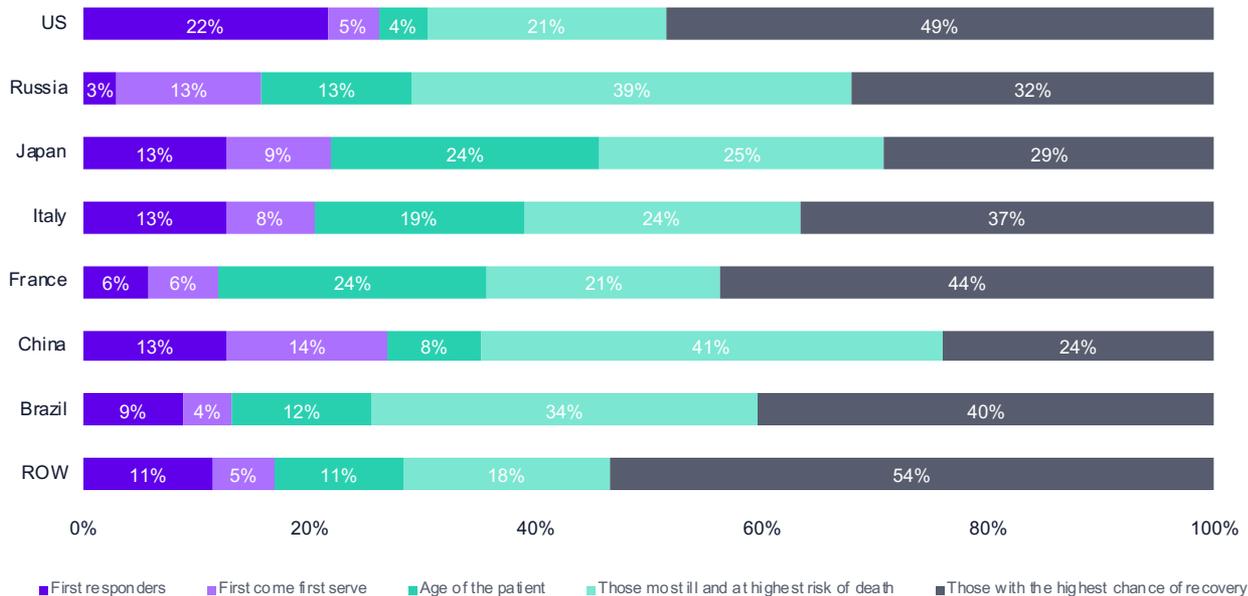
SECTION 7

Second Wave of Outbreak

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How likely are we to see a second wave of COVID-19 in your country?

Globally, a great majority of respondents anticipate a second wave of COVID-19 in their country.

Very likely	35%
Somewhat likely	47%
Somewhat unlikely	14%
Very unlikely	3%

Question 23; N=6227
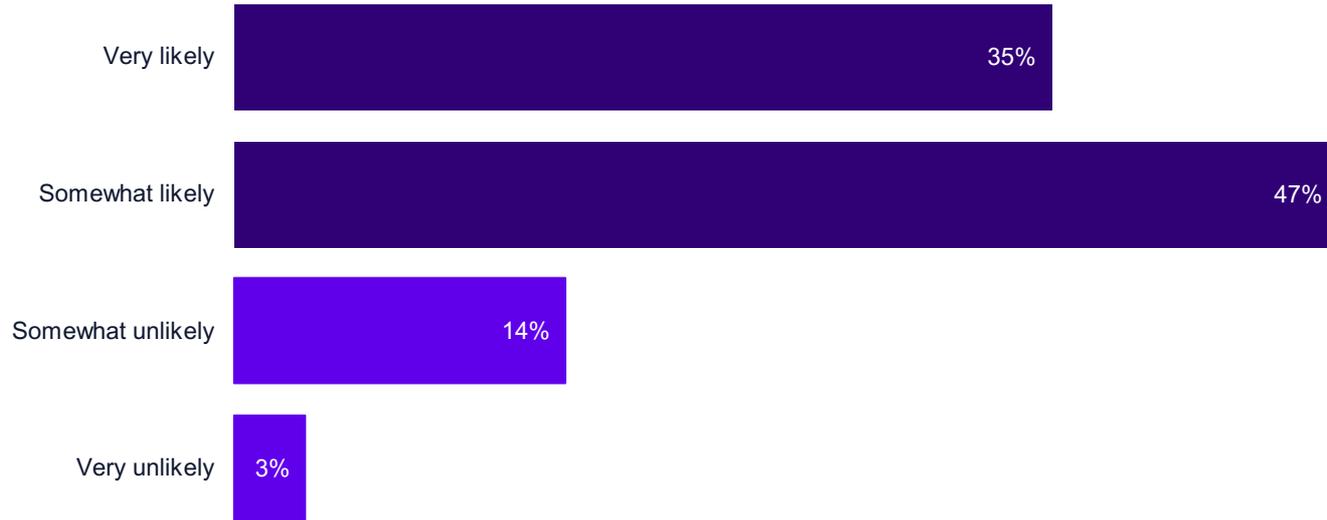
How likely are we to see a second wave of COVID-19 in your country?

Second outbreak is anticipated by 89% of US physicians versus 83% globally. In China, only half of physicians believe a second outbreak is likely.


Legend: ■ Very likely ■ Somewhat likely ■ Somewhat unlikely ■ Very unlikely

US: 45%, 44%, 9%, 1%
NY: 51%, 36%, 12%, 2%
Europe: 26%, 53%, 17%, 4%
Italy and Spain: 22%, 56%, 18%, 3%
China: 14%, 41%, 33%, 12%
Rest of world: 31%, 49%, 16%, 4%
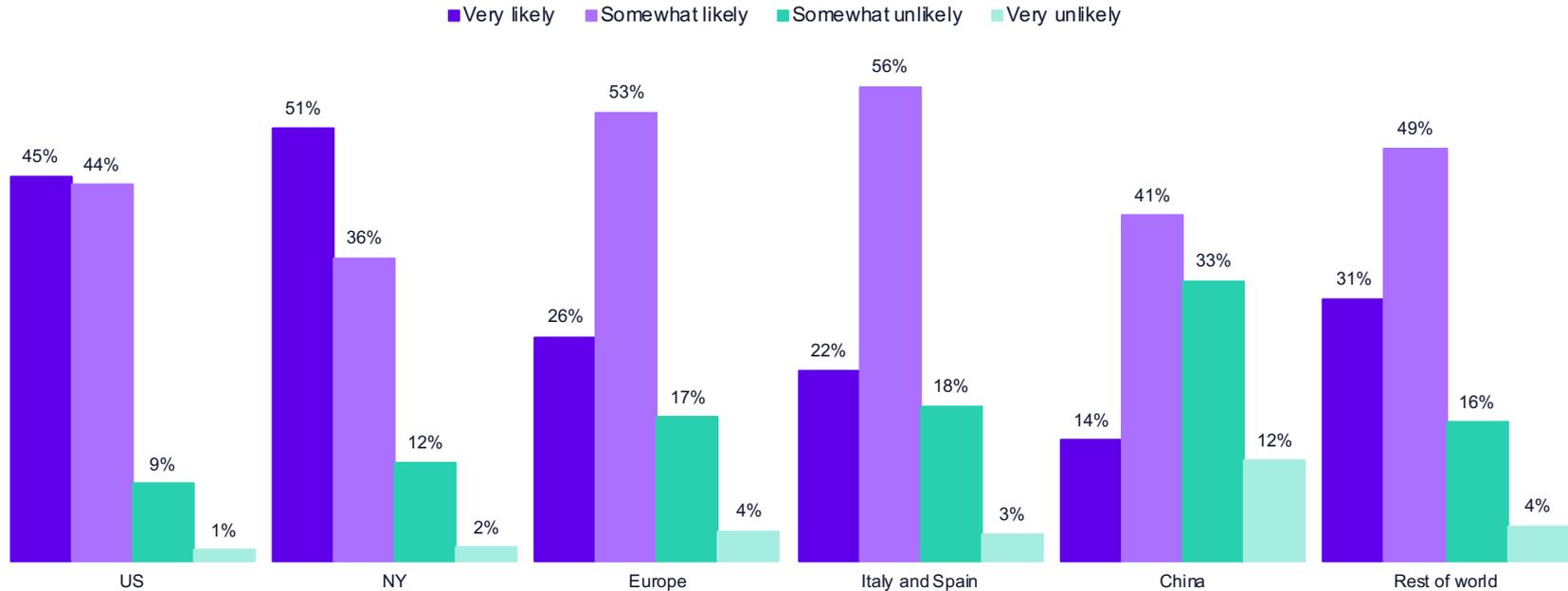
Physician Requests to Life Science Firms to Lessen the Impact of COVID-19

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Which activities should life science firms focus on to lessen the impact of the COVID-19 pandemic?

Physicians most request life science firms develop new rapid tests for COVID-19, followed by new drugs that offer immunity to front-line workers and accelerate efforts to test existing drugs to treat COVID-19.

	1st	2nd	3rd	4th	5th

Develop a new test that allows you to conduct and detect the COVID-19 virus in the office with rapid results within an hour

37%	20%	15%	15%	13%

Develop drugs that offer instant immunity for front line health workers lasting 6 to 8 weeks

19%	20%	21%	20%	20%

Accelerate efforts to test and develop the evidence for using existing approved drugs (such as anti-malarial drugs) to treat COVID-19

17%	24%	23%	21%	15%

Accelerate efforts to develop and test new medicines to specifically treat COVID-19 based on the current strain

14%	21%	24%	25%	16%

Building the infrastructure to monitor coronaviruses around the world, similar to the flu, to develop seasonal vaccines

| 13%	15%	16%	19%	37%

Question 8; N=6227

SECTION 9

COVID-19 Concerns

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How concerned are you about catching COVID-19 in the next 2 months?

Most physicians are concerned about catching COVID-19 themselves in every region, though a bit less in China.

Question 17; N=6227
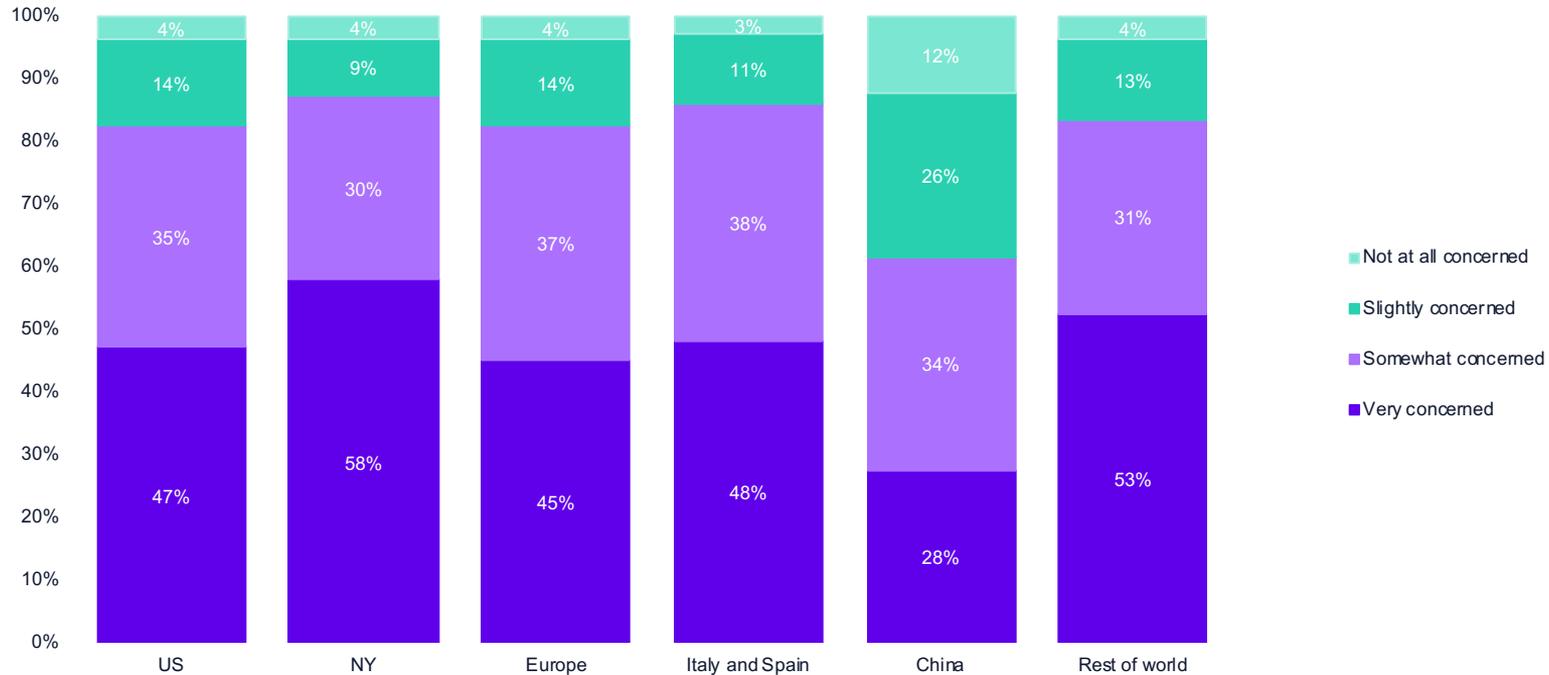
How concerned are you about giving COVID-19 to your family members in the next 2 months?

Physicians are deeply concerned about giving COVID-19 to their family members

Category	Percentage
Very concerned	54%
Somewhat concerned	28%
Slightly concerned	13%
Not at all concerned	5%
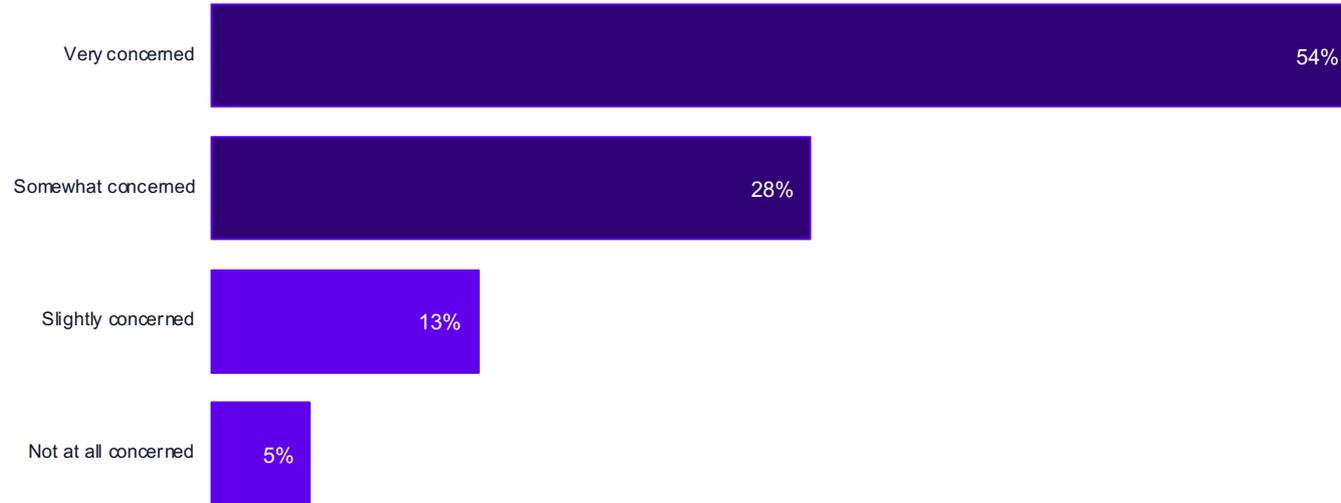
Have you taken any special precautions at home to limit the possibility of spreading COVID-19 to your family members?

The great majority of physicians report taking special precautions to limit the possibility of spreading COVID-19 to family members.


No
18%

Yes
82%
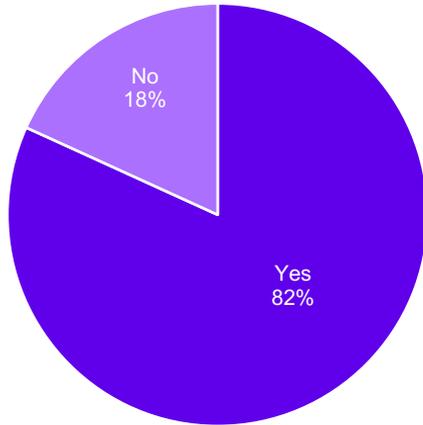
Special precautions taken include:

- Handwashing
- Social distancing
- Changing their clothes
- Showering before joining family
- Stay in isolation
- Masks
- Hygiene
- Limiting contact
- Living/sleeping separately from their family

Questions 19, 20; N=6227

# As a result of the COVID-19 pandemic, how would you rate your personal level of stress and that of your patients?

Personal Stress Level
A large majority of MDs in every country report that they themselves are under extreme or moderate stress.

No Stress
4%

Extreme Stress
20%

Moderate Stress
52%

Mild Stress
24%
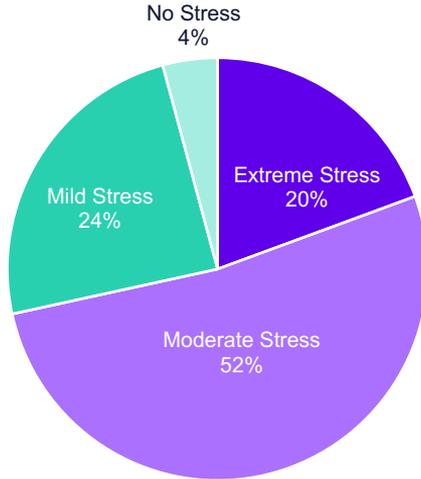
Patient Stress Level
A great majority of physicians in every country report that their patients are moderately or extremely stressed.

No Stress
1%

Extreme Stress
35%

Moderate Stress
53%

Mild Stress
11%

Questions 21 & 22; N=6227
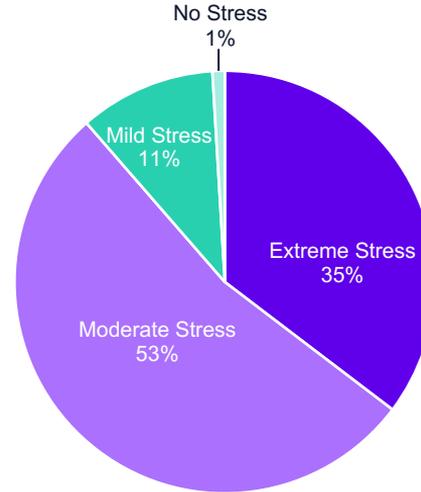
Thank you

Please visit sermo.com for more information on the COVID-19 Real Time Barometer Study and access to Wave II data next week

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