



SYNDICATED COVID-19 PATIENT IMPACT SURVEY FINDINGS

A presentation by GLG

WE'RE IN THE MIDDLE OF A PIVOTAL HEALTHCARE MOMENT

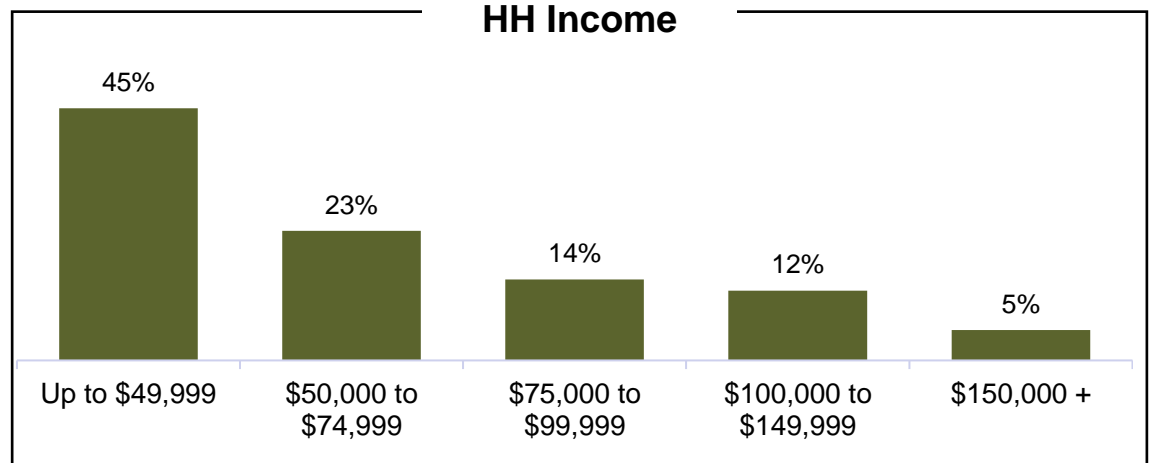
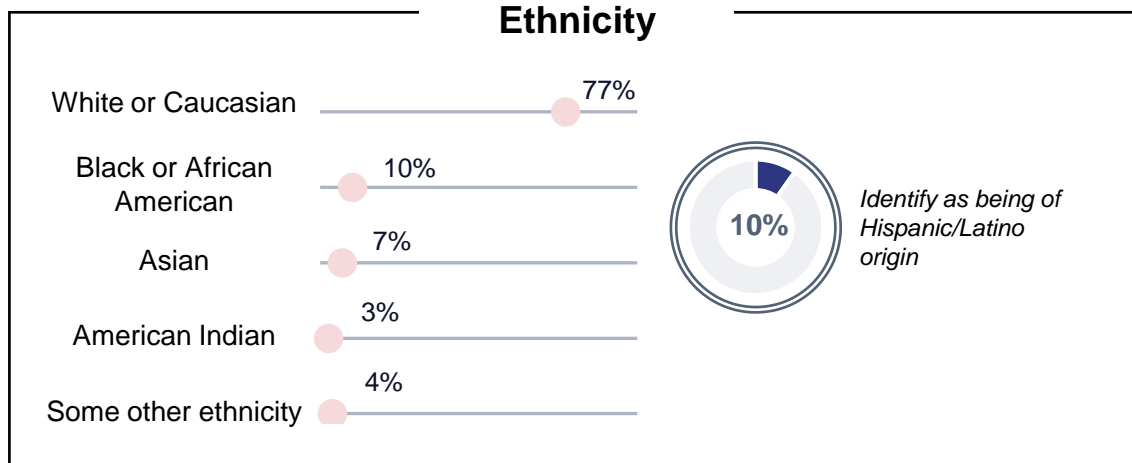
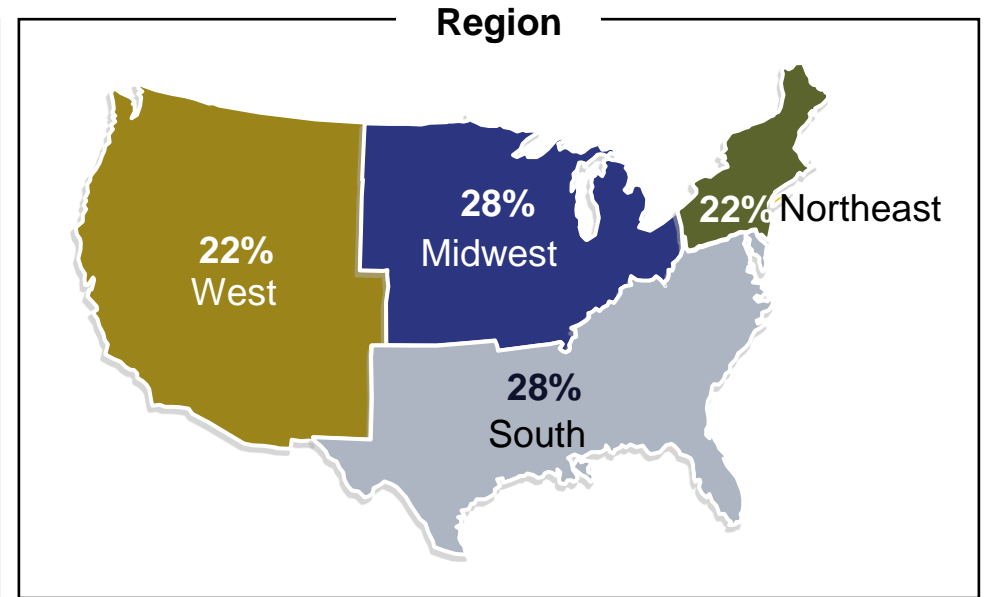
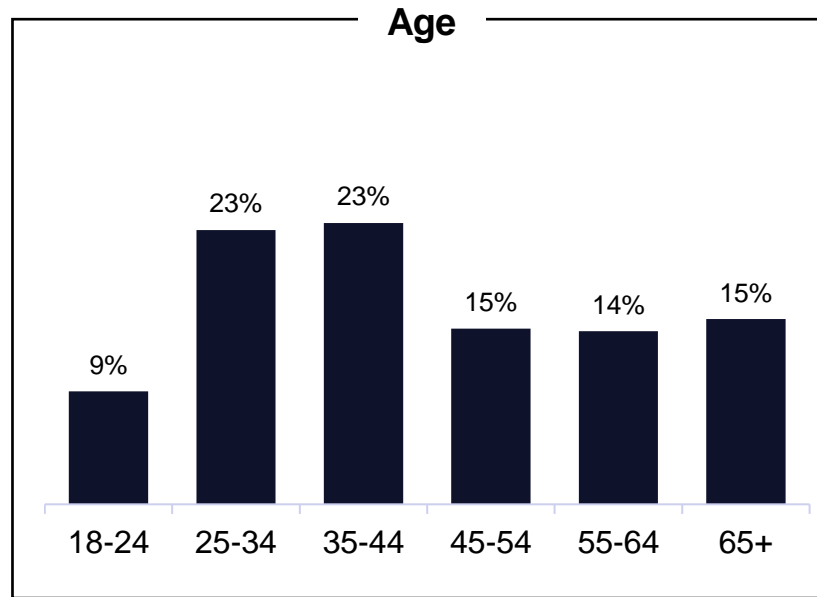
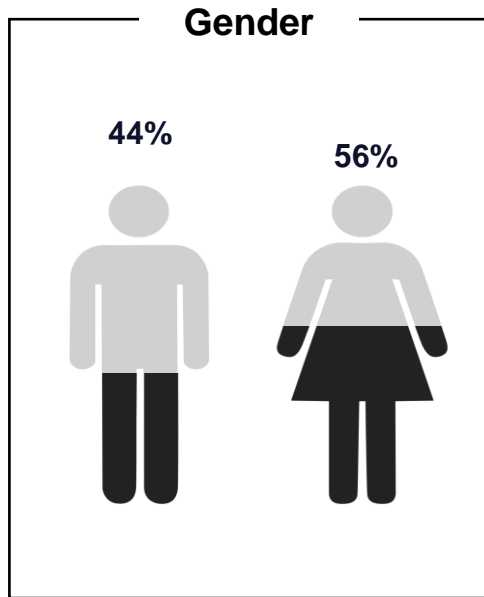


The **GLG Surveys Team** sought to capture a snapshot of patient perceptions of the COVID-19 pandemic at a population level. The survey focused largely on sentiment/consumer confidence. We wanted to understand what they're feeling and what they're doing, today. To access the survey data, get cross-cuts, or to run a bespoke survey against this or other B2B or B2C populations please **speak with your GLG representative**.

Key Insights

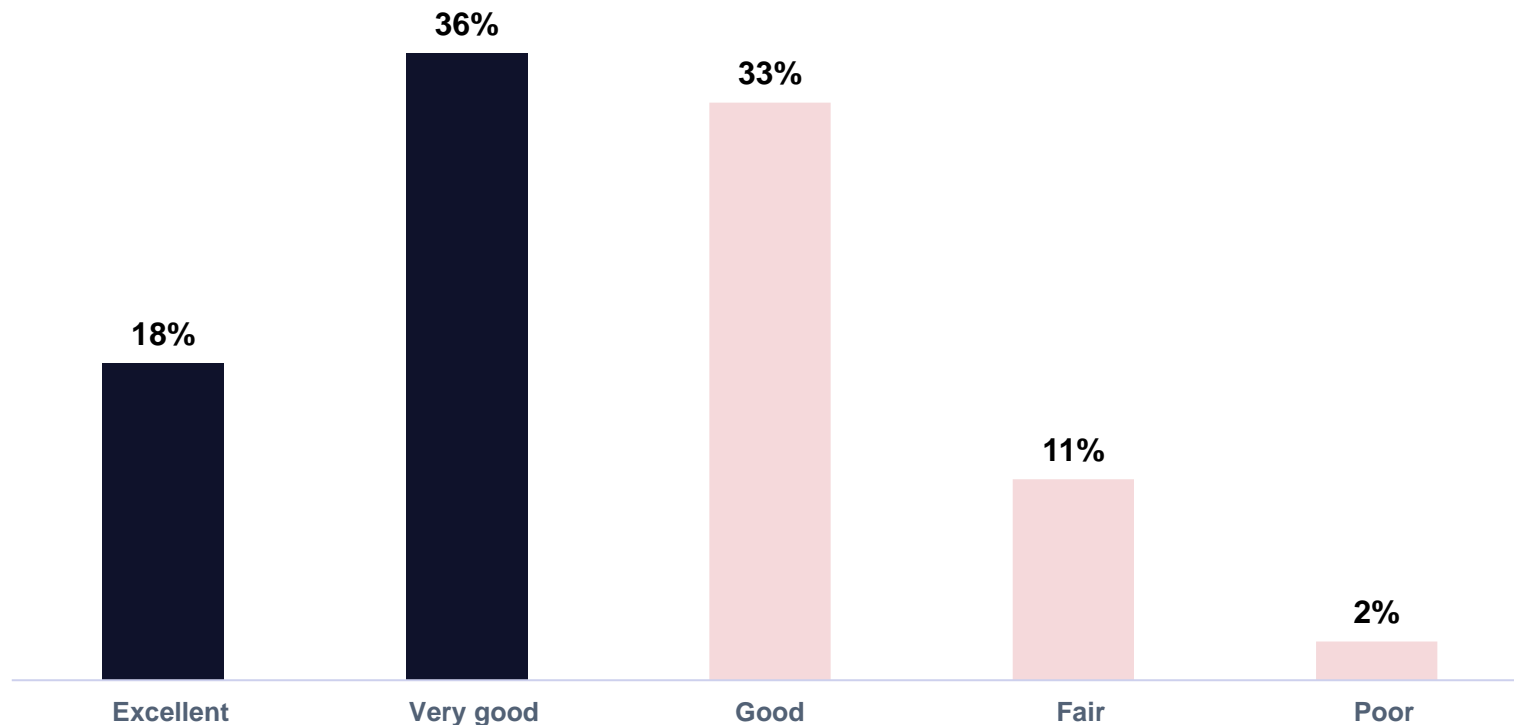
We found that attitudes, beliefs, concerns and responses to the COVID-19 pandemic are significantly influenced by one's existing medical conditions. For the half of Americans with chronic conditions, the stakes are higher, their concerns are greater, and their reactions more extreme. Overall, confidence in the economy and federal leadership is waning, and Americans are looking to healthcare experts and providers to guide them and keep them safe.

SURVEY REPRESENTS THE GENERAL POPULATION (n=500)



AS OF MARCH 2020, AMERICANS GENERALLY FEEL GOOD ABOUT THEIR HEALTH

Overall, how would you describe your health?

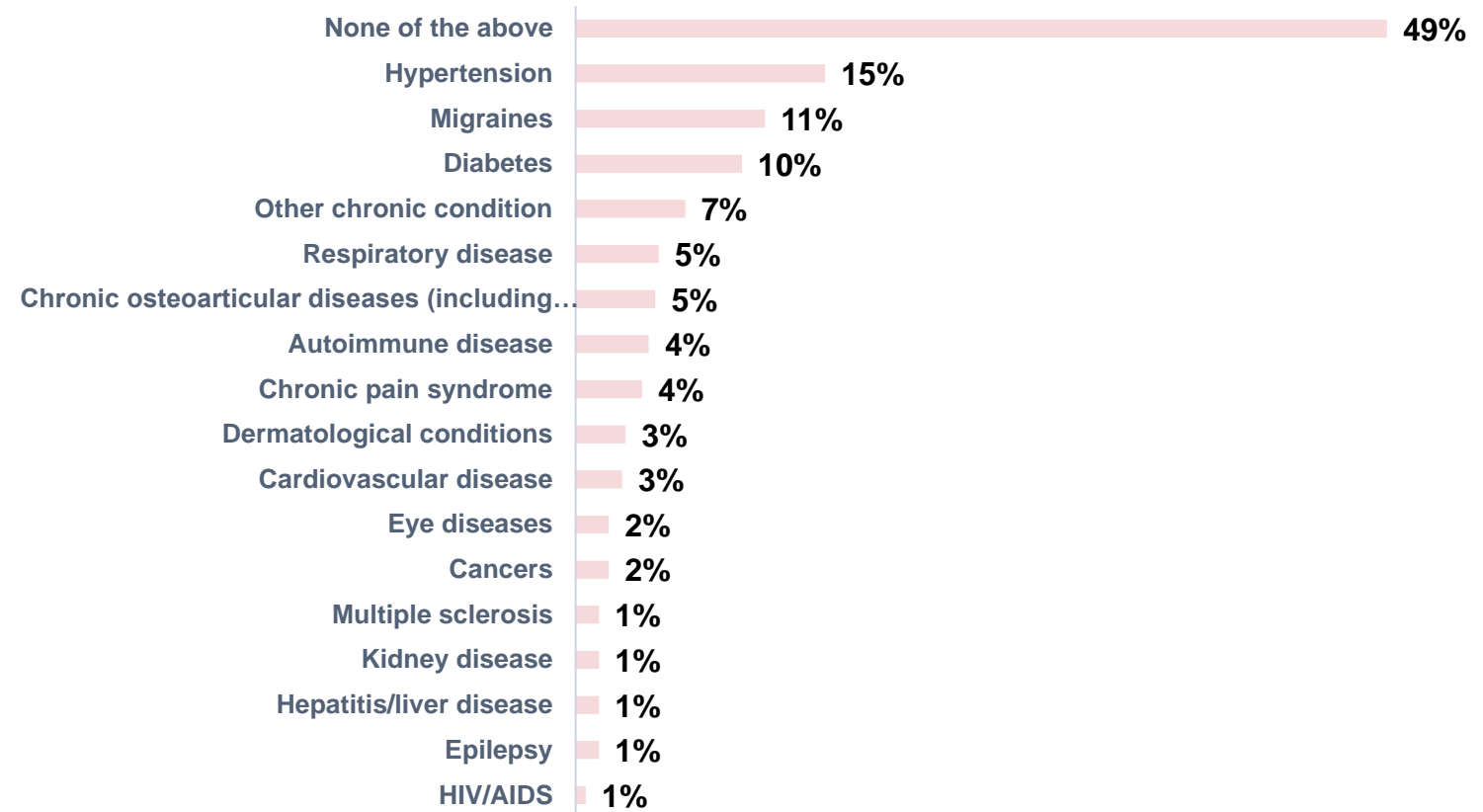


- 54% describe their health as 'Excellent' or 'Very good'. 87% describe their health as 'Good' or better.
- Only 2% of the general population describe their health as 'Poor'.
- Those with chronic conditions significantly more often answer 'Fair' or 'Poor' (21%) than those without chronic conditions (5%).

...EVEN THOUGH ROUGHLY HALF HAVE A CHRONIC MEDICAL CONDITION

- 51% of general population survey participants said they have at least (1) chronic condition.
- Most common conditions include hypertension (15%), migraines (11%), and diabetes (10%).

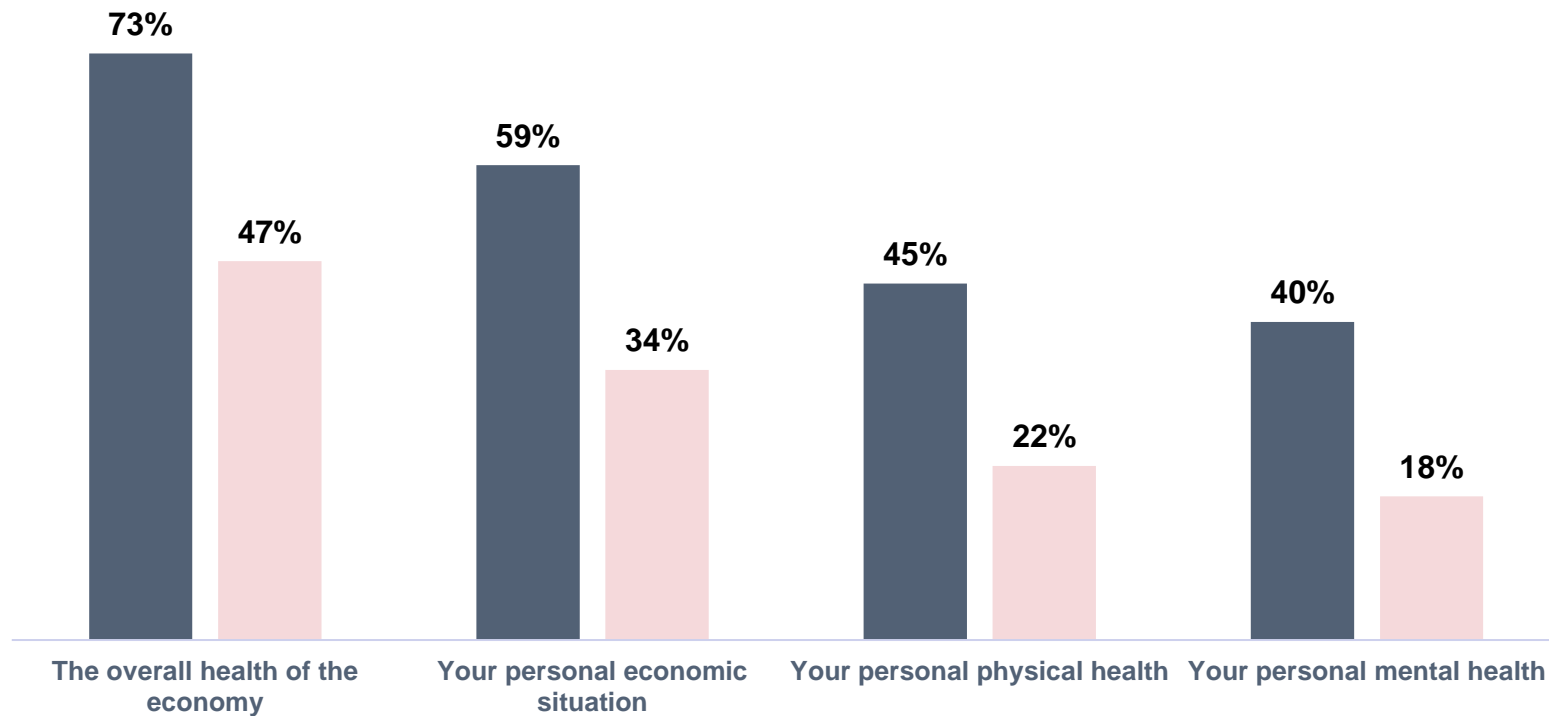
Do you have any of the following conditions?



TODAY, AMERICANS' ECONOMIC CONCERNS CONSISTENTLY OUTWEIGH THEIR HEALTH CONCERNS

Overall, what is your level of concern for each of the following?

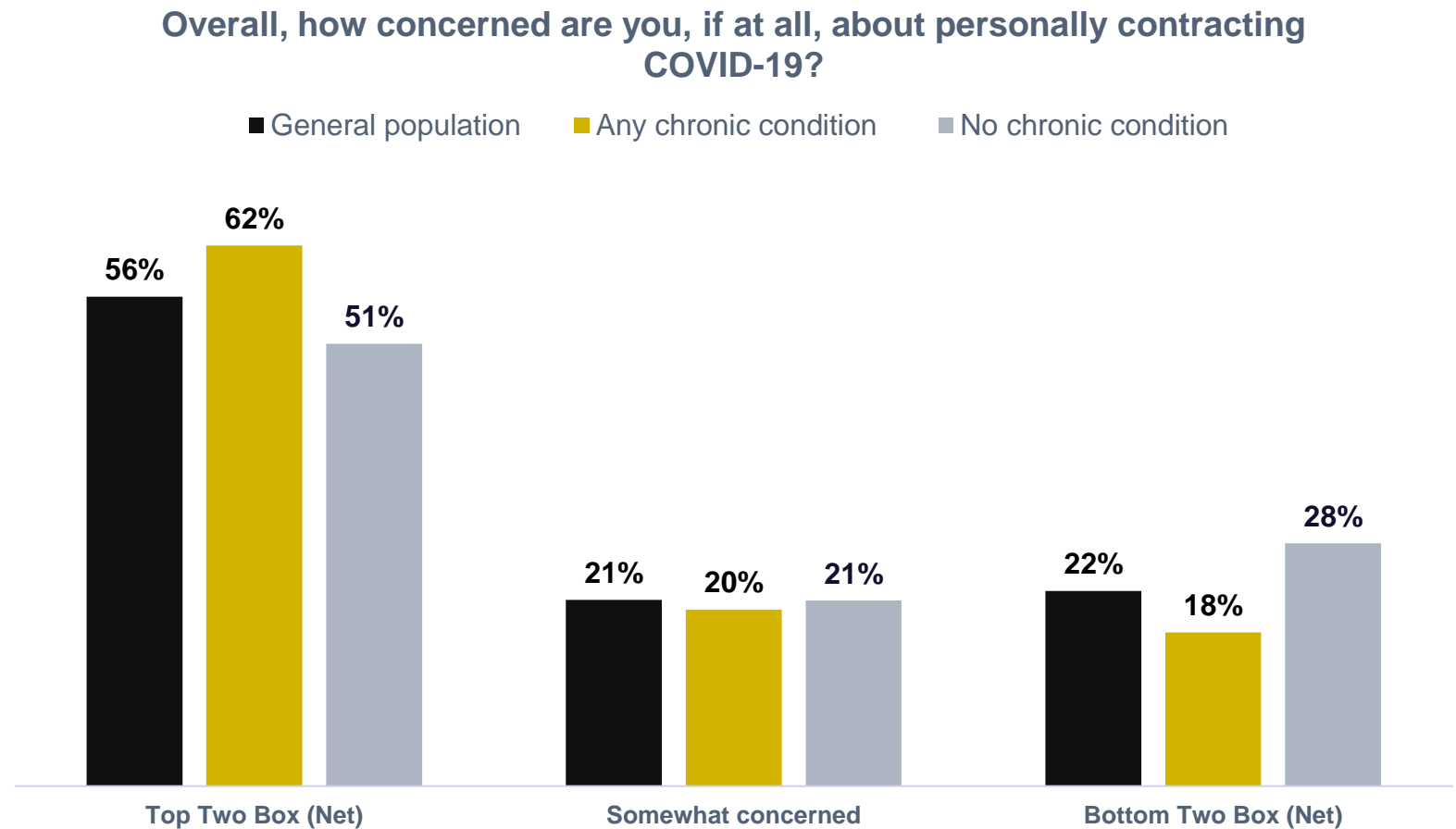
■ Top 2 Box ■ Top Box



- **Nearly ½ of the population feel the US economy's health is 'Extremely' concerning.** 73% say they're 'Extremely' or 'Very' concerned.
- **Those with chronic conditions feel strain more than others.** Those with chronic conditions more often say their personal economic situation (39% vs 30%), their physical health (28% vs 17%), and their mental health (23% vs 14%) is extremely concerning compared to those without chronic conditions.

THEY'RE EXTREMELY CONCERNED ABOUT GETTING COVID-19...

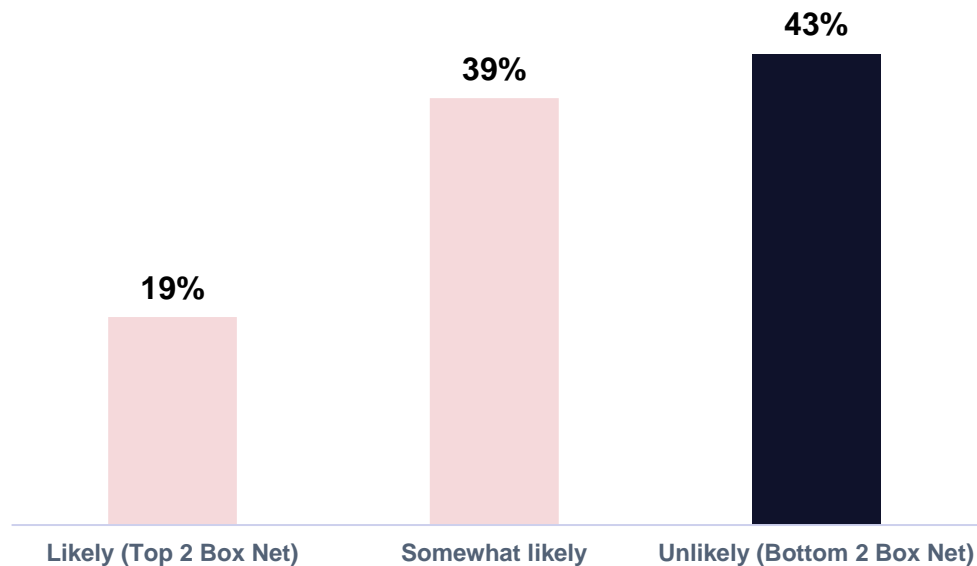
- 56% are 'Extremely' or 'Very' concerned that they will contract Covid-19.
- Those with chronic conditions significantly more often are 'Extremely' or 'Very' concerned (62%) compared to those who do not have any chronic illness (51%).
- Those with no chronic illnesses are significantly less concerned about contracting the virus (28%) than those who do (18%).



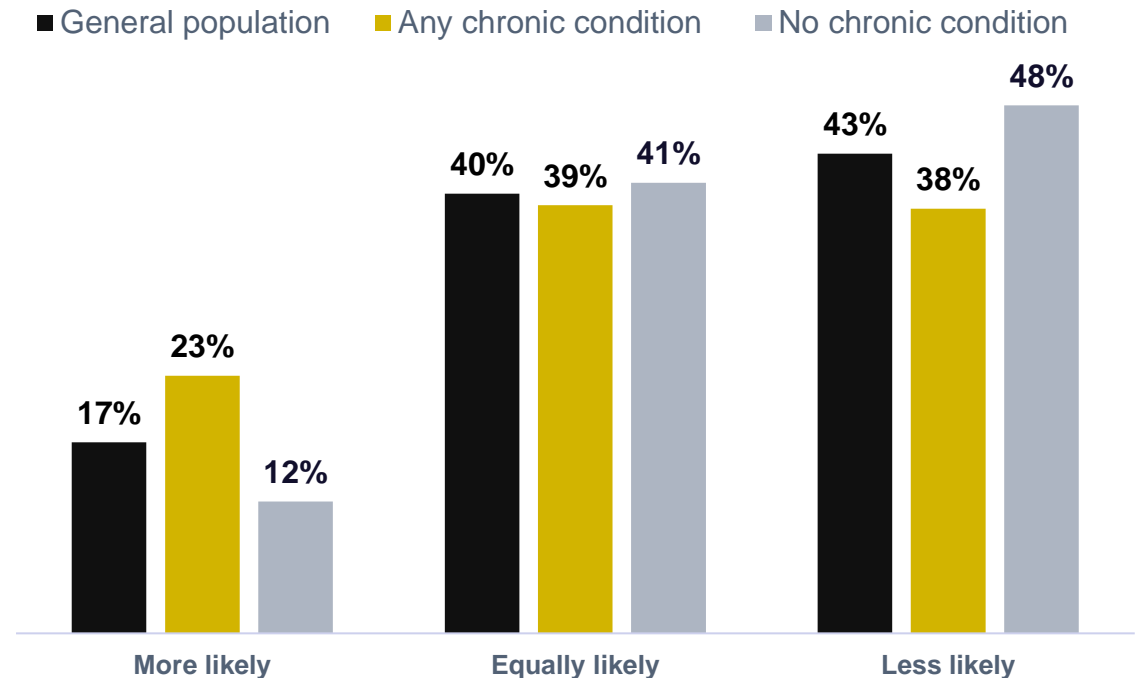
... BUT THEY'RE NOT AS CERTAIN IT WILL HAPPEN TO *THEM*

Only 19% think it's 'Extremely' or 'Very' likely it will happen to them. Those who have chronic conditions significantly more often say they feel more likely (23%) to contract the disease than the average person compared to those who do not have chronic illness (12%).

How likely, if at all, do you think it is that you will contract COVID-19?



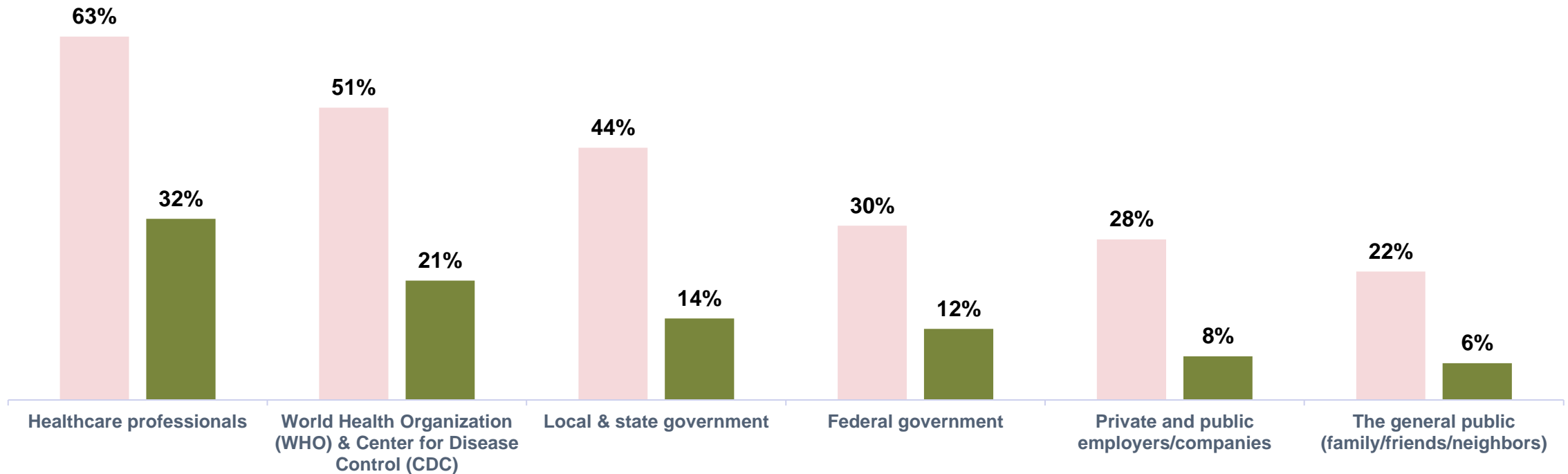
Compared to the average person, do you think you are more/less/equally likely to contract COVID-19?



THEY FEEL MOST CONFIDENCE IN HEALTH AND HEALTHCARE PROFESSIONALS TO LEAD THE COVID-19 OFFENSIVE

How confident are you, if at all, in the following individuals/institutions to take measures to control the COVID-19 outbreak?
****Top 2 Box Summary****

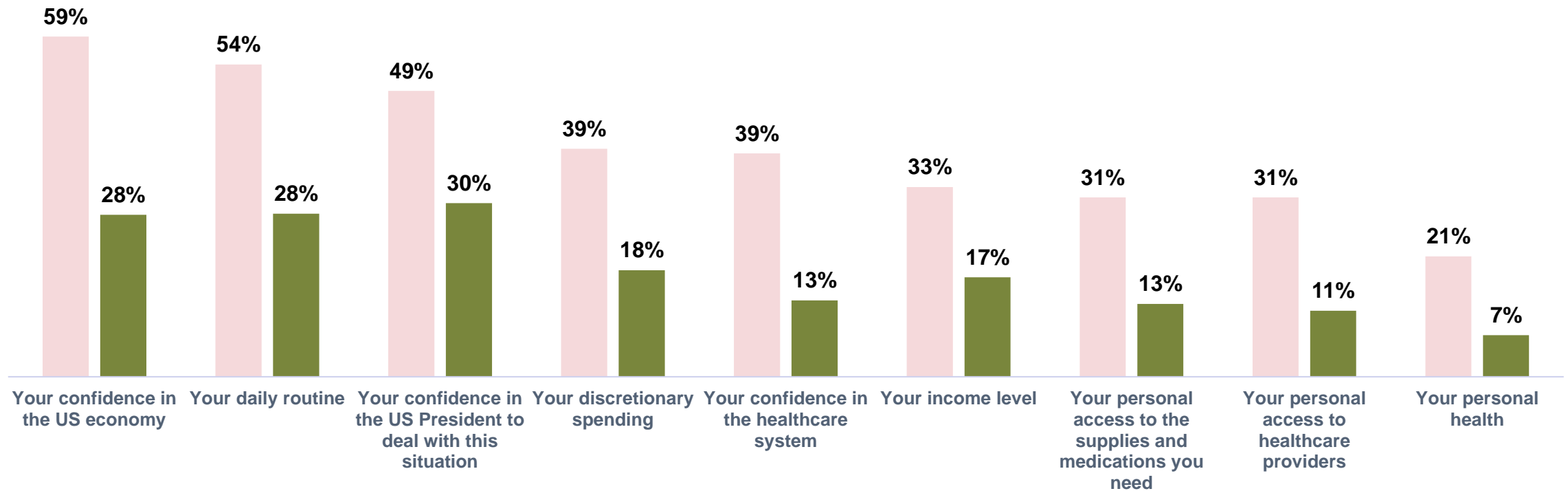
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THE PANDEMIC HAS HAD BIGGEST IMPACT ON CONFIDENCE IN US ECONOMY, CONFIDENCE IN PRESIDENT, & DAILY ROUTINES

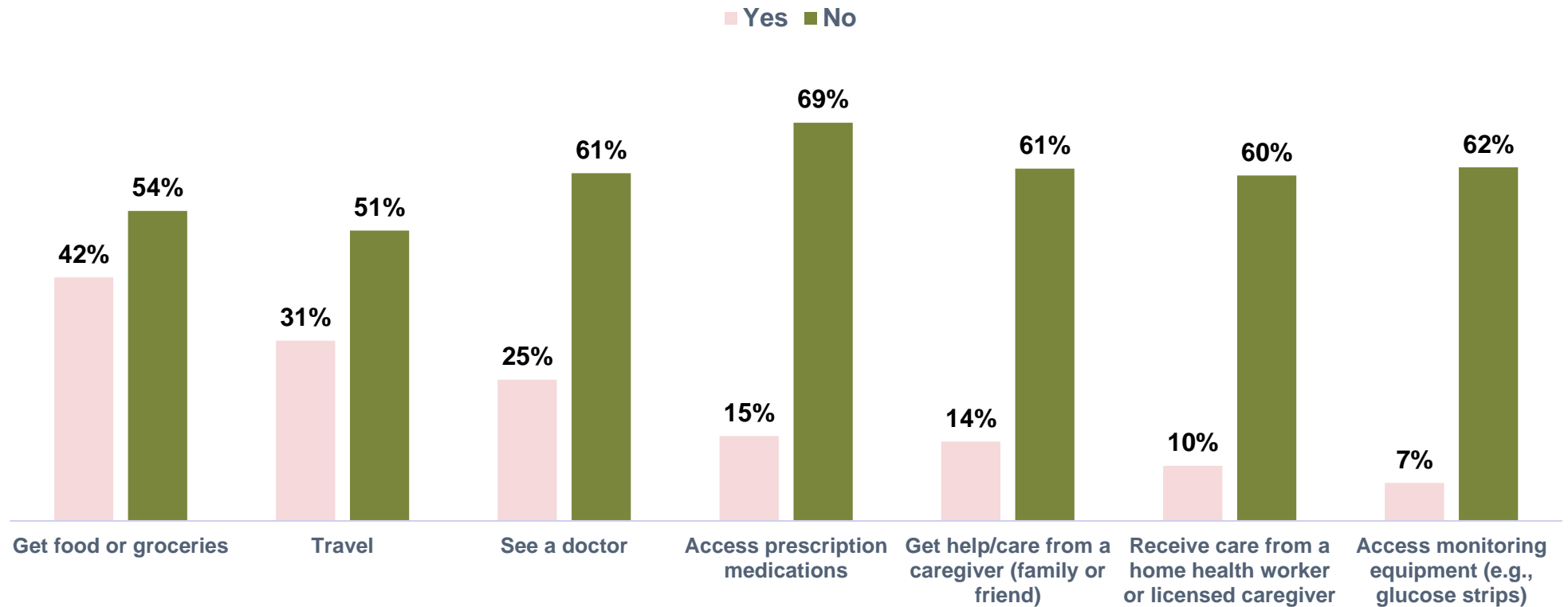
Overall, how much would you say COVID-19 has impacted...

Top 2 Box Top Box



GETTING FOOD AND TRAVELING TOP THE LIST OF DISRUPTED ACTIVITIES

Was there a time in the past two weeks when you needed to do the following but could not because of COVID-19?



FINAL THOUGHTS



At the highest, most general level, U.S. consumers are dramatically changing their daily lives – their activities, their spending – regardless of how closely COVID-19 has impacted them.

If you would like to gain additional insights from this patient population, or get access to the data, **contact your GLG account representative today.**

**THANK
YOU**