



HEALTHCARE *INSIDER REPORT:*

COVID-19 EDITION

DO HEALTHCARE PROFESSIONALS
SEE THE COVID-19 CRISIS DIFFERENTLY?



HEALTHCARE INSIDER REPORT: **COVID-19 EDITION**

explores the changing opinions and attitudes of global healthcare professionals (HCPs) during the COVID-19 pandemic. Spanning seven countries, the survey includes responses from a range of healthcare professionals across a spectrum of specialties, leveraging Dynata's global scale and relationships with healthcare organizations and professionals, to help you understand and respond to changing behaviors and emerging trends during this unprecedented event. In some instances, we are able to compare the responses of HCPs to the general public, using our own data from [Dynata's Global Consumer Trends Report: COVID-19](#).

KEY FINDINGS

WHEN WILL IT ALL END?

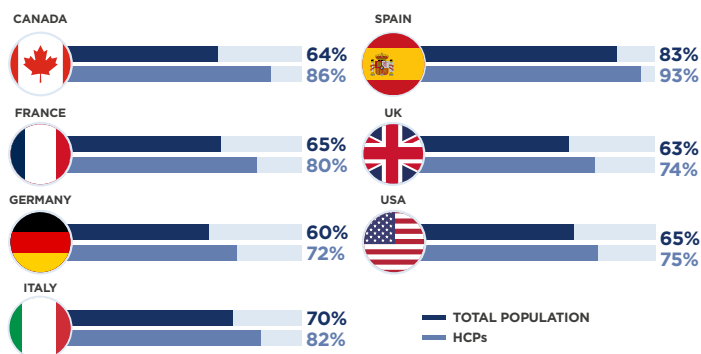
This is the question on the minds of many as the world navigates this unprecedented crisis.

Across the seven countries in our sample, Canadian HCPs are the most pessimistic, with 14% thinking that life will never be the same again. While Canadian HCPs have a particularly gloomy outlook, the Canadian population at large is the most pessimistic across the markets we studied. Geographically, UK HCPs are the next most cautious group in terms of optimism.

Healthcare professionals in all seven markets are more worried than the general public about the ability of their healthcare system to cope with the pandemic: 53% of Spanish healthcare professionals are extremely worried, followed by 36% of French, 32% of UK and 31% of USA HCPs.

Healthcare professionals are also more worried about the health of the elderly in their communities, compared to the total population. Recognizing the risk, HCPs in most of the countries we studied are more likely to avoid visiting an elderly relative during this time than the general population. The biggest discrepancy can be observed in Spain, where 90% of HCPs have avoided visiting elderly relatives compared to 62% of the total population. Out of all seven countries, Italy is the only nation where HCPs are less likely to avoid visiting an elderly relative than its total population, with 58% of HCPs indicating that they've refrained from doing so versus 62% of the total population.

EXTREMELY/VERY WORRIED ABOUT THE HEALTH OF THE ELDERLY IN YOUR COMMUNITY



Overall, HCPs are less worried about their personal health than the total populations of each of these countries. Across these markets, Spanish HCPs are the most concerned; 23% say they are extremely worried about their personal health, followed by 12% in both Italy and France reporting the same level of concern.



GLOBAL ECONOMIC IMPACT

In looking at personal financial worries, between 14% and 40% of HCPs are extremely or very worried about their household financial position:

- **40% of Spanish HCPs** are extremely or very worried (vs. 57% of total population)
- **28% of German and French HCPs** are extremely or very worried (vs. 23% and 36% of total populations)
- **16% of UK HCPs** are extremely or very worried (vs. 31% of total population)
- **17% of USA HCPs** are extremely or very worried (vs. 42% of total population)

In general, HCPs' level of concern for their own household's financial stability is lower than that of the general population.

The clear majority of people are worried, to some degree, about their domestic economies; interestingly, HCPs in particular report a high level of concern. Across all markets studied, an average of 73% of HCPs versus 63% of the total population are extremely or very worried. Healthcare professionals in France, Germany and Spain are considerably more concerned than their countrymen. Spanish HCPs continue to be the most worried, with 97% reporting they are very or extremely worried about the Spanish economy.

- **82% of Italian HCPs** are extremely or very worried
- **80% of French HCPs** are extremely or very worried
- **76% of German HCPs** are extremely or very worried
- **66% of UK HCPs** are extremely or very worried
- **64% of USA and Canadian HCPs** are extremely or very worried

Across countries studied, Spanish HCPs are also the most worried about the global economy (87% are very or extremely worried), with USA HCPs the least worried about the global economy (60%).



PURCHASING HABITS AND BEHAVIORAL CHANGES

In light of government-mandated quarantine and lockdown policies, it's not surprising that the majority of HCPs, across all markets, report having stopped going to restaurants and bars – 92% of USA HCPs report going to these establishments “a lot less.”

Reflecting the scale of their country's lockdown, Italian HCPs report avoiding shopping in physical stores a lot less (72%) than their counterparts in other nations. USA and Canadian HCPs are the next most likely to have changed their behavior in this regard (66% of Canadian and 59% of USA HCPs report doing this a lot less); by comparison, in other European markets (France, Germany, UK), a higher number of HCPs claim to be doing it about the same (France: 32%, Germany: 34%, UK: 20%).

HCPs in the USA and Canada are significantly more likely to have stocked up on food as a result of COVID-19:

- **62% of USA HCPs** say they have stocked up on food
- **54% of Canadian HCPs**
- **36% of UK HCPs**
- **24% of French HCPs**

A significant majority of German (74%), USA (68%), Canadian (62%) and French (62%) HCPs have cancelled a vacation as a result of COVID-19.

German and Italian HCPs are the least likely to refrain from making a non-essential purchase as a result of the pandemic, compared to HCPs from other countries (most notably Canada, Spain and the UK).

HCPs who have decided not to make a non-essential purchase:

- **70% of Spanish HCPs**
- **64% of UK HCPs**
- **60% of Canadian HCPs**
- **54% of French HCPs**
- **53% USA HCPs**
- **40% of Italian HCPs**
- **36% of German HCPs**



HEALTH AND HEALTHCARE

Spanish HCPs are the most concerned about their personal health; 23% say they are extremely worried. Italian and French HCPs are the next most worried, with 12% reporting the same. Overall, HCPs are less worried about their personal health compared to the total population in each of the countries surveyed.

Concern for the elderly in their communities is higher amongst HCPs compared to the general population, with the large majority reporting that they are either extremely or very worried about older generations.

HCPs reporting that they are worried about the health of the elderly in their community:

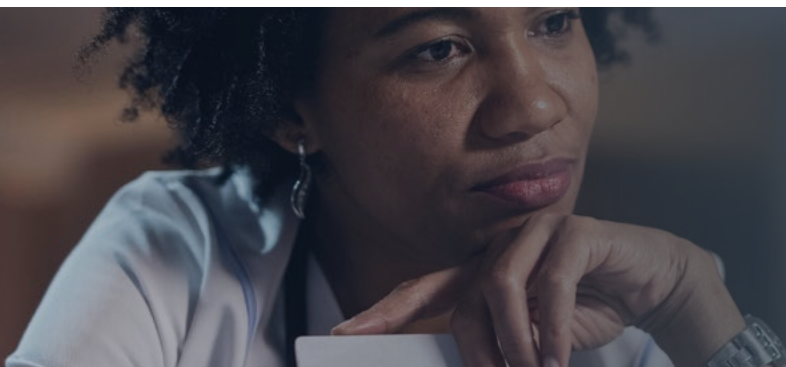
- **93% of Spanish HCPs** (vs. 83% of the total population)
- **86% of Canadian HCPs** (vs. 64% of the total population)
- **82% of Italian HCPs** (vs. 70% of the total population)
- **80% of French HCPs** (vs. 65% of the total population)
- **75% USA HCPs** (vs. 65% of the total population)
- **74% of UK** (vs. 63% of the total population)
- **72% of German HCPs** (vs. 60% of the total population)

The worry among Spanish HCPs is likely exacerbated by the fact that 97% are concerned about their healthcare system's inability to cope with the pandemic (53% are extremely worried), compared to 87% of the total population with this concern.

HCPs in the UK and France are the next most worried about their healthcare systems' ability to cope (82%), with German HCPs the least concerned; only 48% are very or extremely worried about this possibility.

With the exception of the USA, HCPs are washing their hands a lot more now compared to the total population, perhaps because they are more likely to recognize the benefits and face high risk scenarios on a daily basis.

A significant majority of German, USA, Canadian and French HCPs have **CANCELLED A VACATION AS A RESULT OF COVID-19.**





SOCIETY

A higher number of Canadian, UK and Spanish HCPs (80%, 82% and 80%, respectively) say they are washing their hands a lot more than they used to, compared to USA, Italian and German HCPs (61%, 54% and 56%, respectively). Similar to their respective total populations, the majority of HCPs across all seven countries believe they know everything they need to know about protecting themselves from contracting the virus. When asked if they agree or disagree that “I know everything I need to know about how to protect myself from contracting [COVID-19]”:

- **84% of German HCPs** agree with the statement, “I know everything I need to know about how to protect myself from contracting it” (vs. 76% of the total population)
- **82% of Italian HCPs** agree with this statement (vs. 79% of the total population)
- **82% of UK HCPs** agree with this statement (vs. 76% of the total population)
- **80% of Spanish HCPs** agree with this statement (vs. 76% of the total population)
- **78% of Canadian HCPs** agree with this statement (vs. 79% of the total population)
- **74% of French HCPs** agree with this statement (vs. 67% of the total population)
- **71% USA HCPs** agree with this statement (vs. 66% of the total population)

Overall, French HCPs are the least likely to think they have a good understanding of what the illness would entail if they caught it compared to those in other markets (58% in France vs. 80% in the UK).



SOURCES OF INFORMATION

Healthcare professionals report that they rely on either government officials or their fellow HCPs for information. In Canada, France, Italy and Spain, “other healthcare professionals” are the primary source of information for HCPs. In the UK, USA and Germany, however, government officials (in conjunction with other HCPs) are the choice for information.

Italian HCPs are the most worried about being around strangers (50% are very or extremely worried), followed by UK HCPs (40%). German and French HCPs are less worried, at 24% and 26%, respectively. HCPs share the same degree (or less) of worry as the total population in this regard.

HCPs are more likely to have avoided visiting an elderly relative, compared to the general population:

- **90% of Spanish HCPs** have avoided visiting elderly relatives as a result of the pandemic (vs. 62% of the total population)
- **82% of French HCPs** (vs. 62% of the total population)
- **78% of German HCPs** (vs. 54% of the total population)
- **68% of UK and Canadian HCPs** (vs. 54% & 58% of the total populations)
- **59% of USA HCPs** (vs. 39% of the total population)
- **58% of Italian HCPs** (vs. 62% of the total population)

Across the board, HCPs believe we must put the common good above our own needs. Strongest agreement with this sentiment comes from Canadian HCPs (88%) and UK HCPs (86%). This strong opinion held by most HCPs is marginally higher than among the total populations in these seven countries (average of 80% for HCPs vs. 76% for total population).



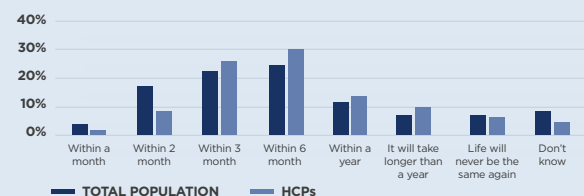
WHEN WILL IT ALL END?

Fourteen percent of Canadian HCPs believe life will never be the same again, in stark contrast to only 3% of USA HCPs. UK HCPs share some of this pessimism, with 20% believing it will take longer than a year before life returns to normal.

Despite the somewhat dire situations in Spain and France, where death rates from COVID-19 are in the double digits, HCPs in these markets remain the most optimistic, with 40% and 38% believing that life will return to normal in three months’ time.

On average, there is slightly more pessimism among HCPs than the total population:

AVERAGE ACROSS USA, UK, CA, FR, DE, IT & ES



METHODOLOGY:

Between March 30 and April 3, 2020, Dynata surveyed 380 healthcare professionals from seven countries (Canada, France, Germany, Italy, Spain, UK, USA), asking them a range of questions about their behaviors and attitudes. The same questions are being asked of a nationally representative sample of each country's population on a weekly basis and have been used for comparison in this summary, where appropriate.



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