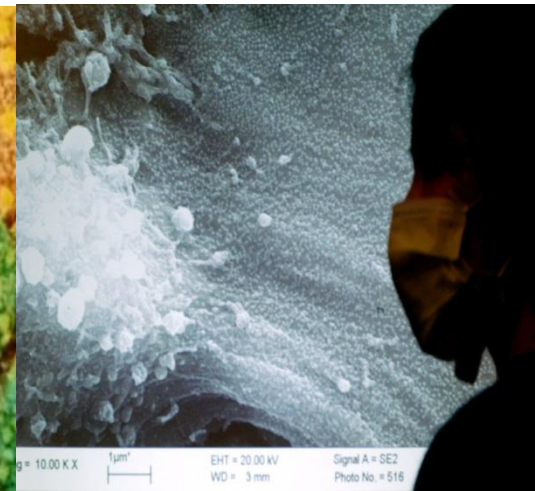
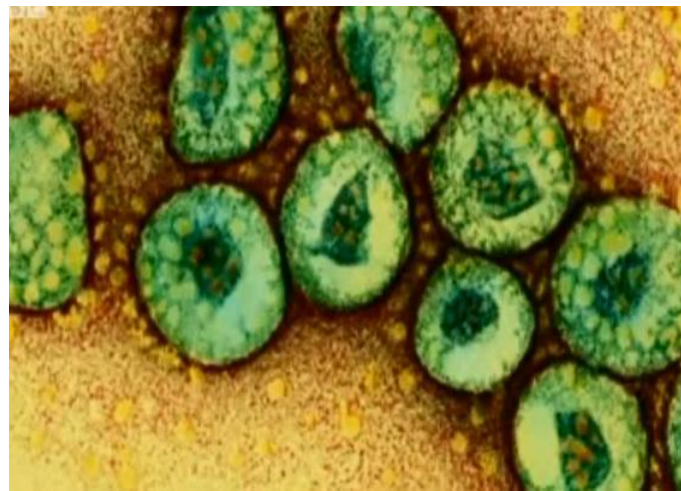
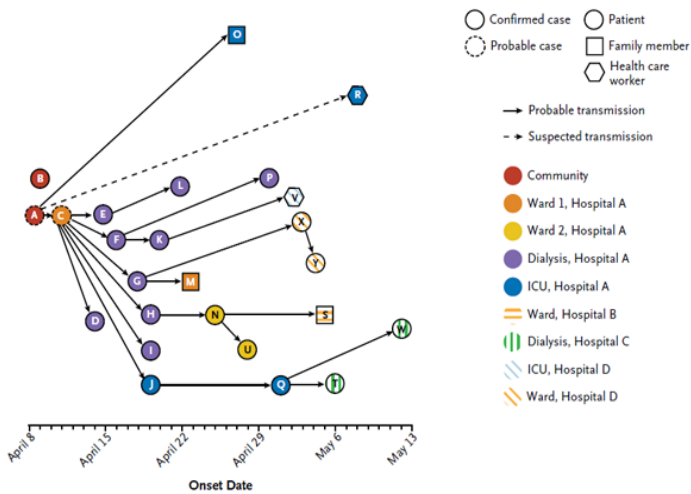




Global @dvisor

Middle Eastern Respiratory Syndrome

*Respondents in 24 Countries Assess
the Impact of MERS for a Global Perspective*



- The following is a report on citizen views towards the Middle Eastern Respiratory Syndrome (MERS) an outbreak in certain countries of a virus that people are comparing to SARS which occurred in 2003. The study was conducted online in 24 countries and will be viewed as a benchmark for future studies.
- **The first cohort includes the views of those in 15 well developed nations:** Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden and the United States. In these countries, the samples are reflective of the general population.
- **The second cohort includes the views of those in 9 developing nations:** Brazil, China, India, Indonesia, Mexico, Russia, Saudi Arabia, South Africa and Turkey. In these countries the online respondents are more to have higher levels of income and education compared to their respective populations. As such, this *vanguard population* is more likely to be tuned into reports of MERS due to their access to the internet and other media/information and also because they are likely to be more engaged in the economy and travel as “**Upper Deck Consumer Citizens**.”

- These are findings of the Global @dvisor wave fielded June 4th to June 18th, 2013. The monthly Global @dvisor data output is derived from a balanced online sample in 24 countries around the world via the Ipsos Online Panel system.
- For the results of the survey presented herein, an international sample of 19,014 adults aged 18-64 in the US and Canada, and age 16-64 in all other countries, were interviewed. Approximately 1000+ individuals participated on a country by country basis via the Ipsos Online Panel with the exception of Argentina, Belgium, Finland, Hungary, Indonesia, Mexico, Netherlands, Poland, Russia, Saudi Arabia, South Africa, South Korea, Sweden and Turkey, where each have a sample approximately 500+. The precision of Ipsos online polls are calculated using a credibility interval. In this case, a poll of 1,000 is accurate to +/- 3.5 percentage points and one of 500 is accurate to +/- 5.0 percentage points in their respective general populations.
- In countries where internet penetration is approximately 60% or higher the data output is weighted to reflect the general population. Of the 24 countries surveyed, 15 yield results that are representative: Argentina, Australia, Belgium, Canada, France, Germany, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden, United Kingdom and United States. The nine remaining countries surveyed –Brazil (45.6% Internet penetration among the citizenry), China (41%), India (11.4%), Indonesia (22.1%), Mexico (36.5%), Russia (47.7%), Saudi Arabia (49%), South Africa (17.4%) and Turkey (45.7%)—have lower levels of connectivity therefore cannot be weighted to be general population representative; however, the online sample in these countries are particularly valuable in their own right as they are more urban/educated/income than their fellow citizens and are often referred to as “*Upper Deck Consumer Citizens*”.

As you may know, there has been some reference recently to an outbreak in certain countries of a virus that people are comparing to SARS which occurred in 2003. In the past couple of weeks, the World Health Organization and the European Centre for Disease Control issued assessments of a coronavirus outbreak in the Middle East, which has been recently named MERS, for Middle Eastern Respiratory Syndrome. There are concerns that the virus may be spreading from person to person and some have called for urgent investigations to find the source of the virus and how it is infecting people. There have been 40 confirmed infections with the virus as of early June. Of those cases, 20 have been fatal. Most of the cases have been in Saudi Arabia, other countries that have reported cases are Jordan, Qatar, the United Arab Emirates, Germany, Britain and France.

1. Have you seen, read, or heard about MERS?

Yes, a great deal, Yes, some, Yes, a little, No, nothing

2. To what extent are you concerned that there might be cases of MERS in your country in the near future?

Very concerned , Somewhat concerned, Not very concerned, Not at all concerned

3.To what extent do you agree or disagree with the following statements?

Strongly agree, Somewhat agree, Somewhat disagree, Strongly disagree

I know enough about MERS to protect my family and me.

My government has taken appropriate steps to screen travelers coming into my country to prevent the spread of MERS.

I will consider cancelling or delaying travel if I found out the country I wanted to visit had experienced any cases of MERS.

Travelers entering my country who have been in any of the countries where MERS has been present should be screened by a health professional before entering.

Summary of Views on the MERS Virus

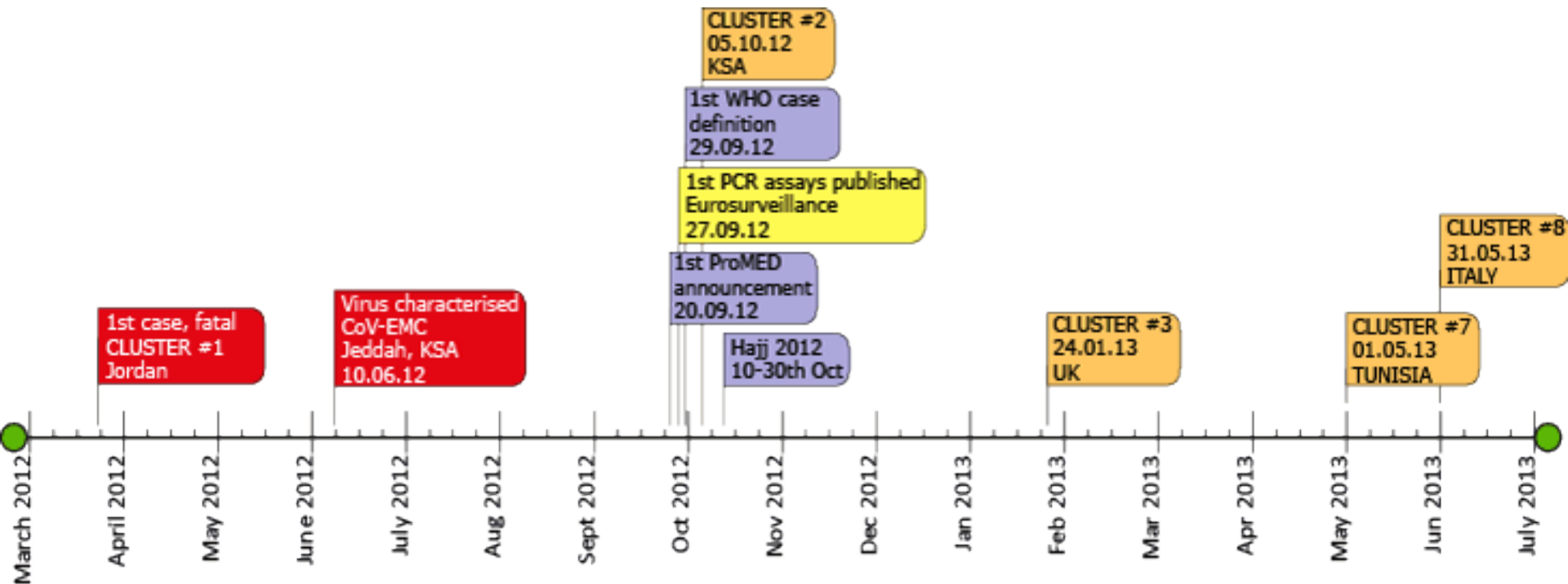
Majorities in 24 Countries Surveyed Concerned of MERS Cases Presenting in Their Country in the Near Future

*Awareness Not Yet Widespread but Support for Screening Travelers,
Reconsidering Travel Plans is High*

The findings in this benchmark study paint a picture of impending global concern.

Most global citizens are unaware of MERS but, once made aware of the disease, express strong concern for the coronavirus outbreak spreading to their country. The general populations in the 15 developed nations surveyed appear to have little confidence in their own abilities to protect themselves and their families and in their government's actions so far to respond to the virus. Confidence is notably higher among *upper deck consumer citizens* in the nine developing nations but large majorities of both developed and developing country populations surveyed believe travelers entering their country should be screened—and equally as many may well change their own travel plans if MERS has presented at a potential destination.

A Timeline Showing Key Events Starting From the First Confirmed Human Case of Infection by the Middle East Respiratory Syndrome Coronavirus in June 2012:



- **In the 15 more developed nations studied, four in ten (39%) are aware of MERS, while in the 9 developing countries of upper deck consumer citizens, half (49%) are aware.** Awareness among the 15 developed nations surveyed is highest in France (59%), Sweden (51%) and Italy (49%) and lowest in Australia (20%), Spain (26%) and Hungary (28%). In the nine developing countries surveyed awareness is highest in China (67%), India (63%) and Saudi Arabia (62%) and lowest in South Africa (35%), Mexico (35%) and Brazil (35%).
- **A majority in both cohorts – 59% generally (and 65% of those aware) across the 15 countries and 70% generally (and 78% of those aware) across the 9 countries – are concerned that MERS may come to their country in the near future. In both regions, awareness of MERS increases likelihood of concern.** In the developed nations, the most concerned are from: Argentina (77%), Spain (65%) and Italy (64%) while the least concerned are from: Sweden (39%), Poland (47%) and Germany (51%). Of the upper deck consumer citizens, the strongest concern is found in: Indonesia (84%), Mexico (78%) and India (75%) while the weakest concern is found in: China (52%), Saudi Arabia (62%) and South Africa (63%).

Summary

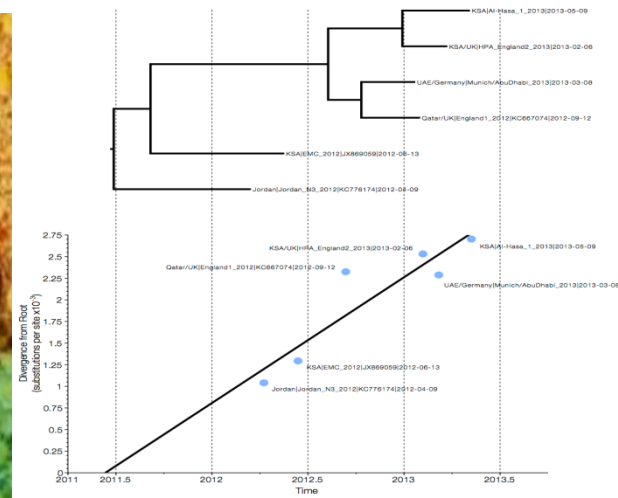
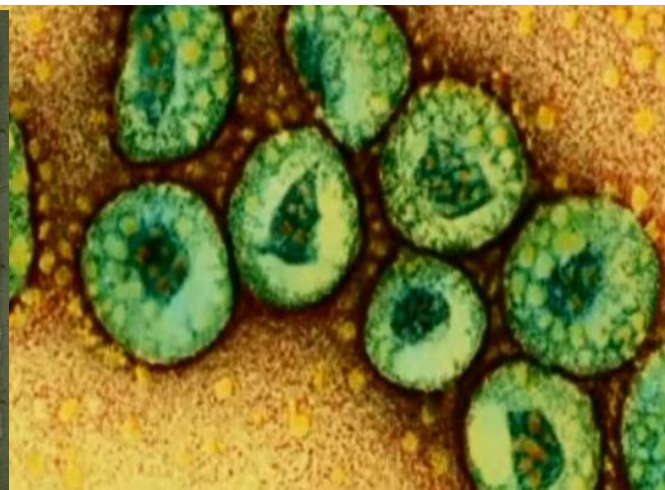
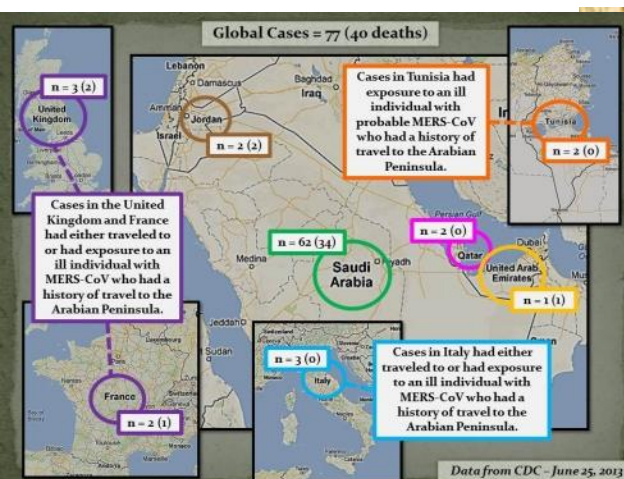
- Only two in ten (18%) generally of all in the 15 countries (28% of those aware), but double (40%) the general upper deck consumer population in the 9 developing nations (55% of those aware), agree they “know enough about MERS to protect their families and themselves”.
- The vast majority of respondents in both country groupings agree (strongly and somewhat) that travelers entering their country who have been in MERS-affected countries should be screened by health professionals first (80% of the aggregate of the 15 countries, 90% of the 9).
- Majorities in all countries studied agree that they would consider cancelling or delaying travel if they found out the country they wanted to visit has experienced any cases of MERS (72% of the aggregate of the 15 countries, 82% of the 9).
- Four in ten in the general populations of those in the 15 more developed nations (38%– 42% among those aware of MERS) and six in ten of the general upper deck consumer citizens (57%– 60% among those aware of MERS) in the nine countries surveyed agree that their government has taken appropriate steps to screen travelers entering their country to prevent spread of MERS.



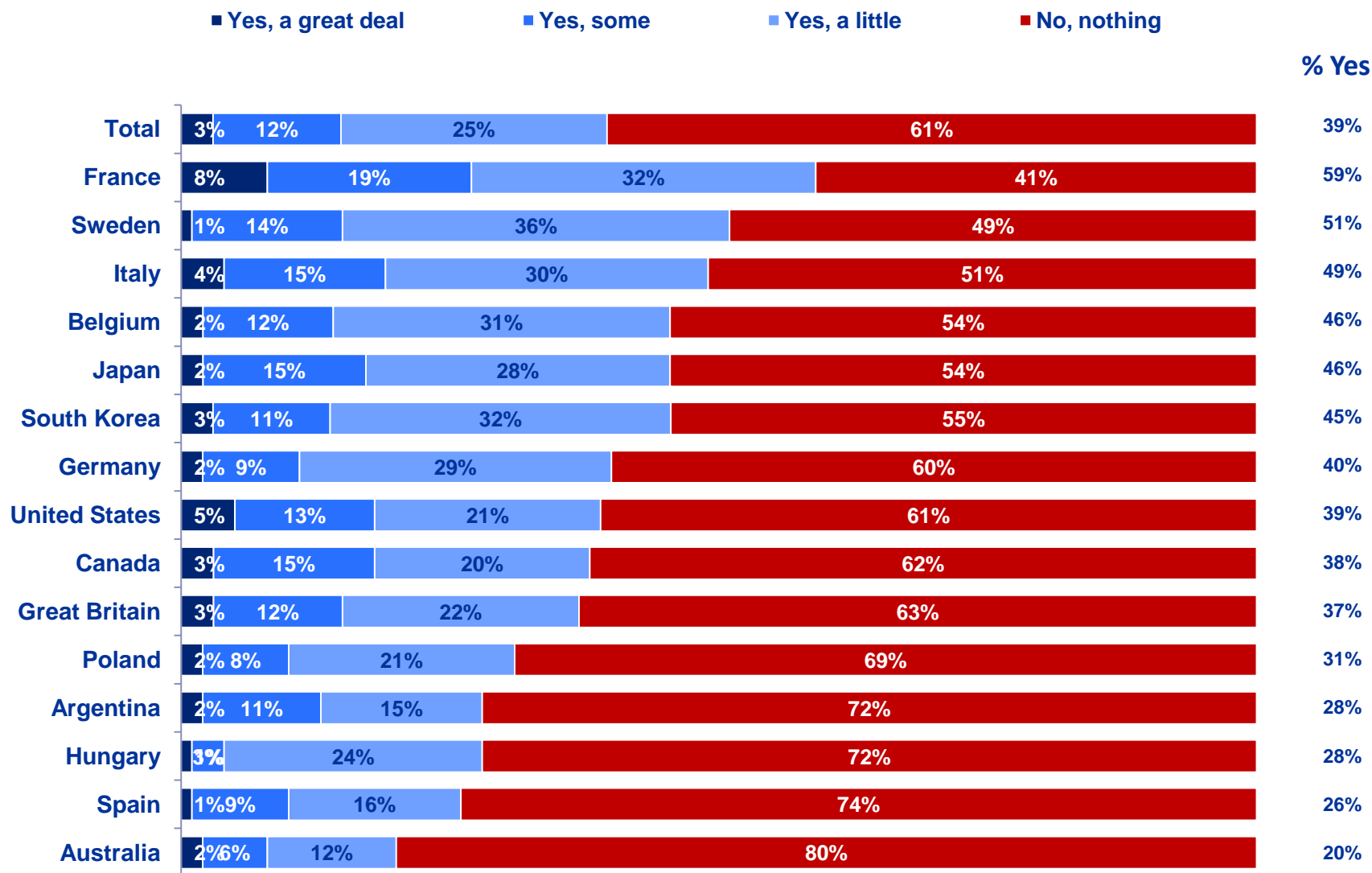
Global @dvisor

View of the General Population in 15 More Developed Nations

Argentina, Australia, Belgium, Canada, France, Germany, Great Britain, Hungary, Italy, Japan, Poland, South Korea, Spain, Sweden and the United States

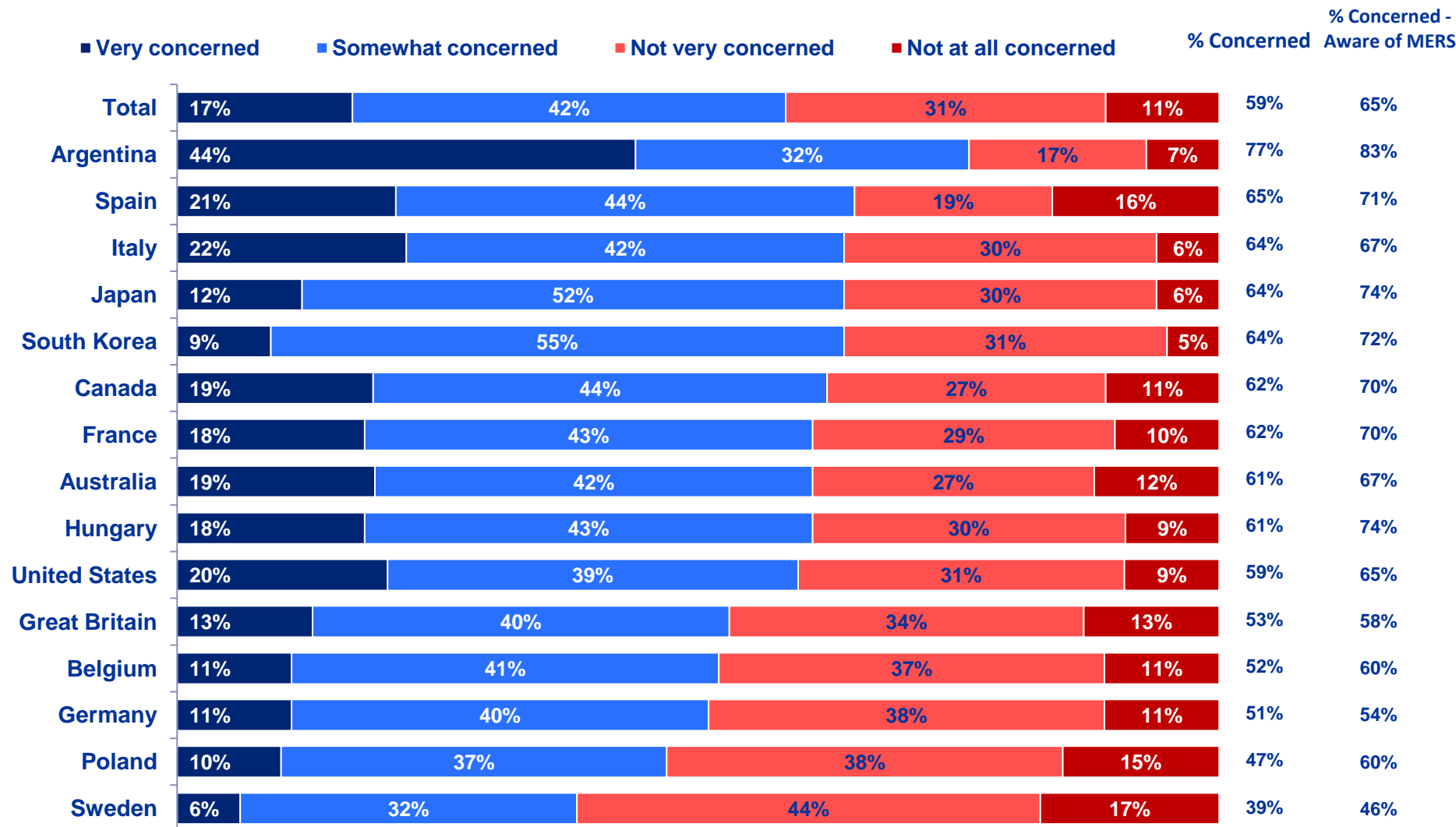


Four in Ten (39%) Overall Aware of MERS...



Six in Ten of All (59%) and of Those Aware (65%) in 15 Countries Concerned MERS Might Come to Their Country...

View of the General Population in 15 More Developed Nations

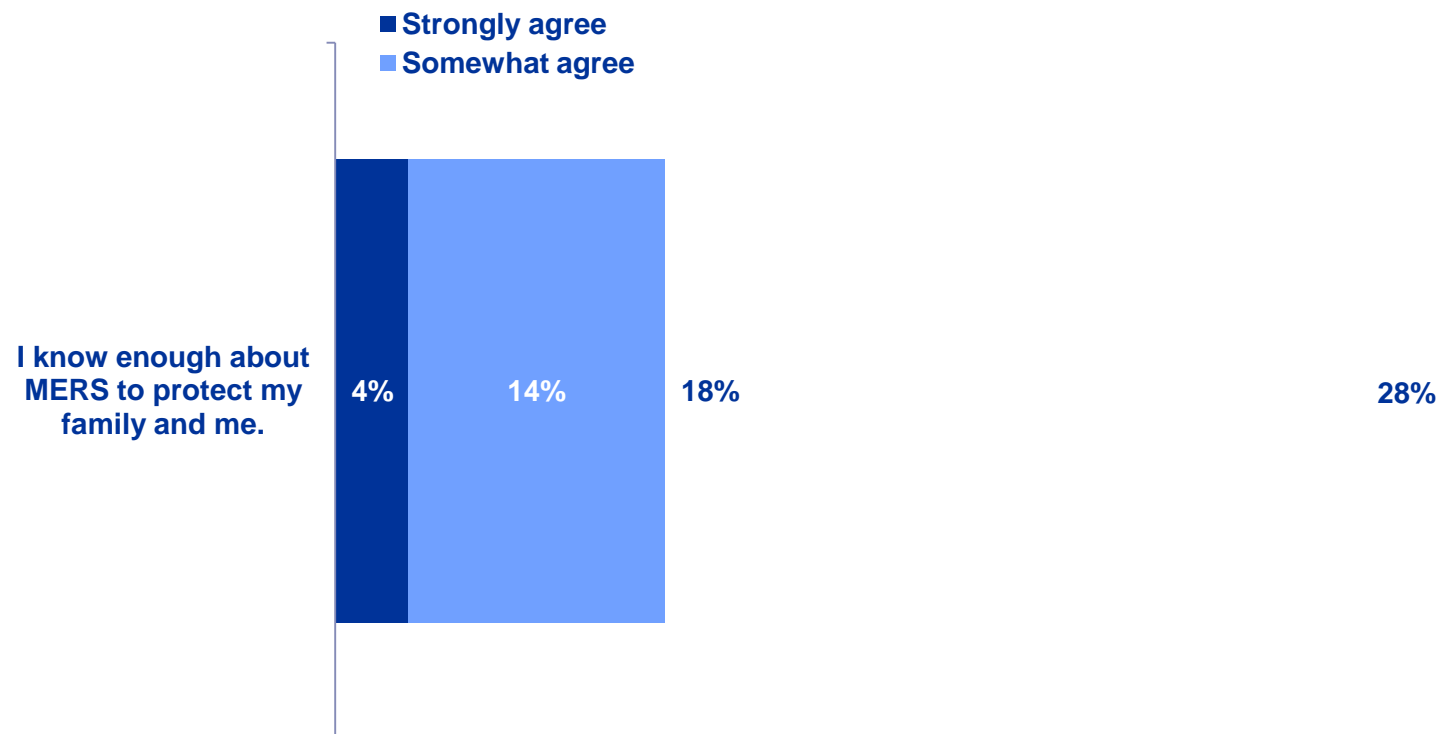




Only 2 In10 (18%) Know Enough About MERS to Protect their Family and Themselves—and Only 28% of Those Aware...

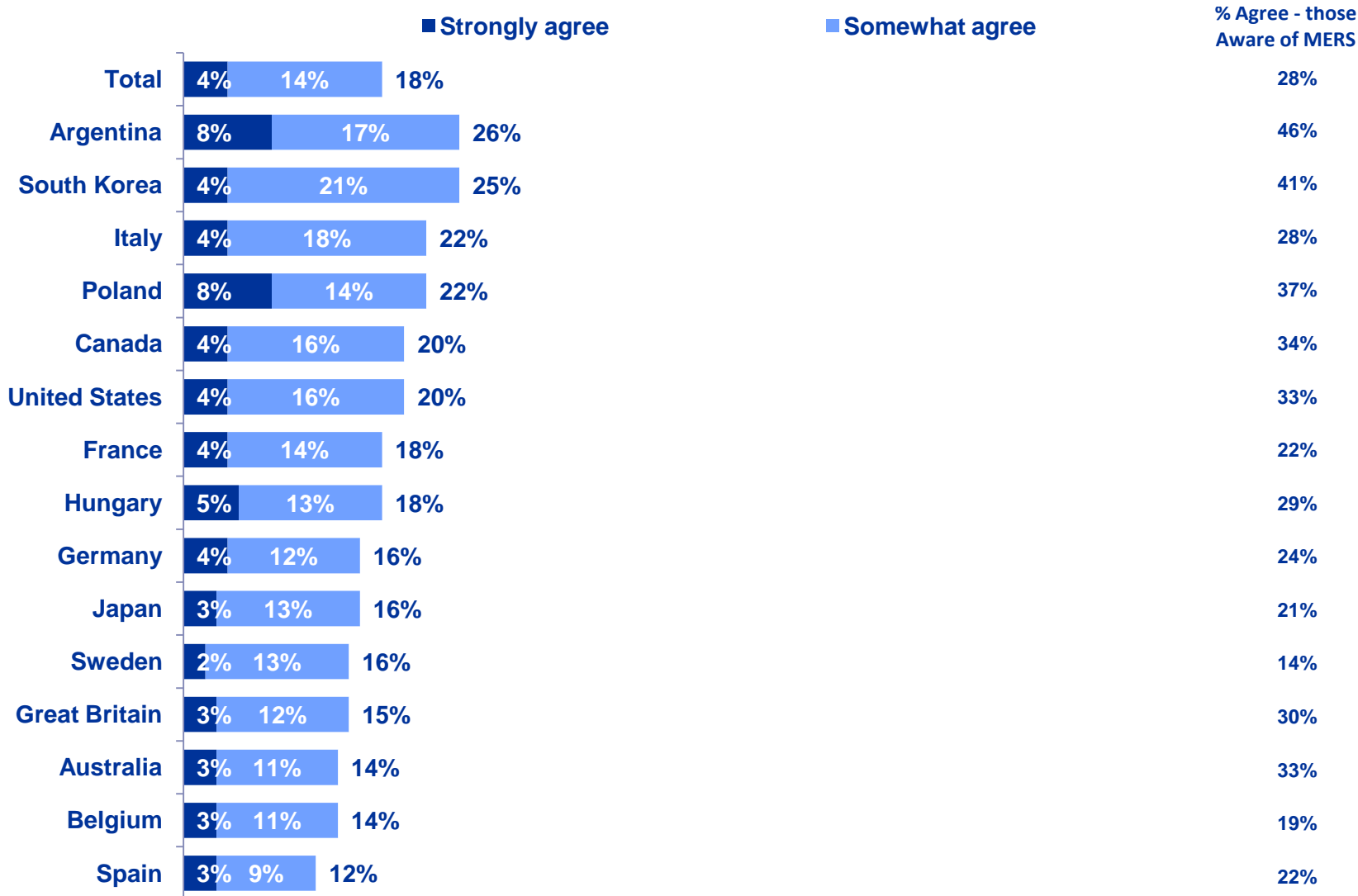
View of the General Population in 15 More Developed Nations

% Agree - those
Aware of MERS



2 in 10 (18%) of All and Three in Ten (28%) of Those Aware Agree They Know Enough About MERS to Protect Their Families and Themselves...

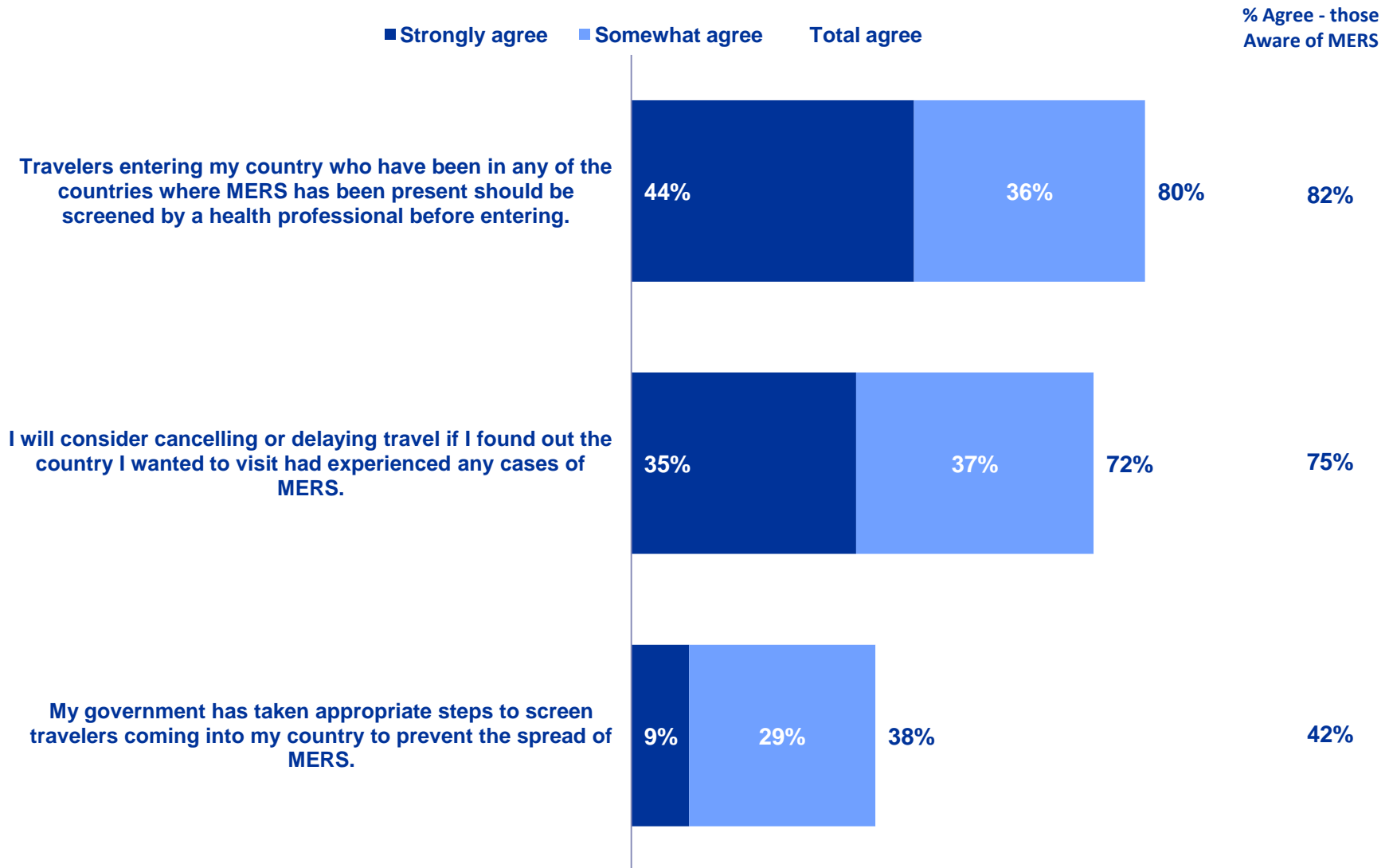
View of the General Population
in 15 More Developed Nations



HL3.1. [I know enough about MERS to protect my family and me.] To what extent do you agree or disagree with the following statements?

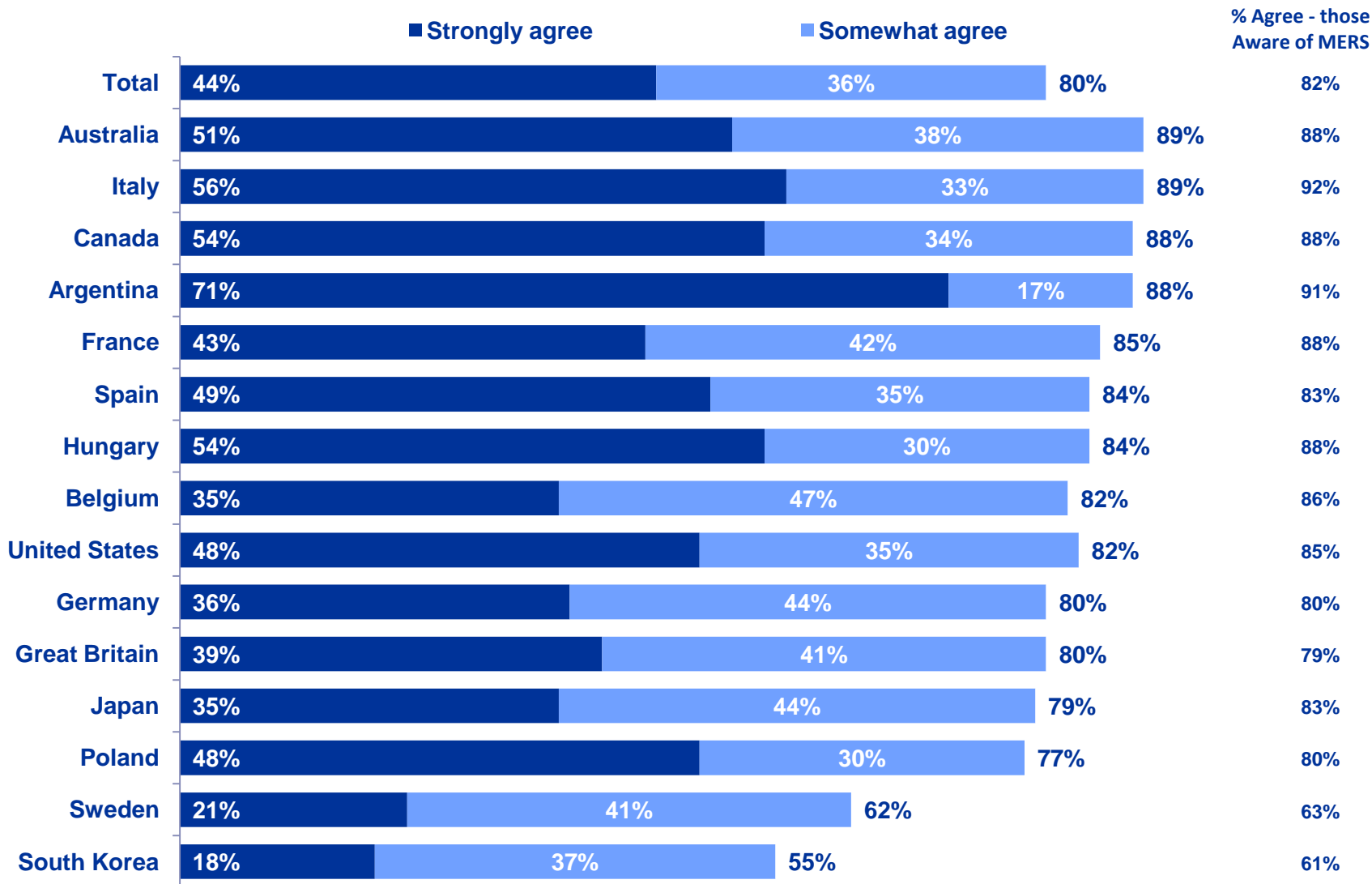
Governments Get Low Marks 38%) as Majorities Believe Inbound Travelers (80%) Should be Screened and they Might Alter Travel Plans (72%) if MERS Presents at Planned Destination...

View of the General Population in 15 More Developed Nations



Majority (80%) and Those Aware (82%) Agree Travelers Entering their Country From MERS-Affected Places Should Be Screened...

View of the General Population in 15 More Developed Nations

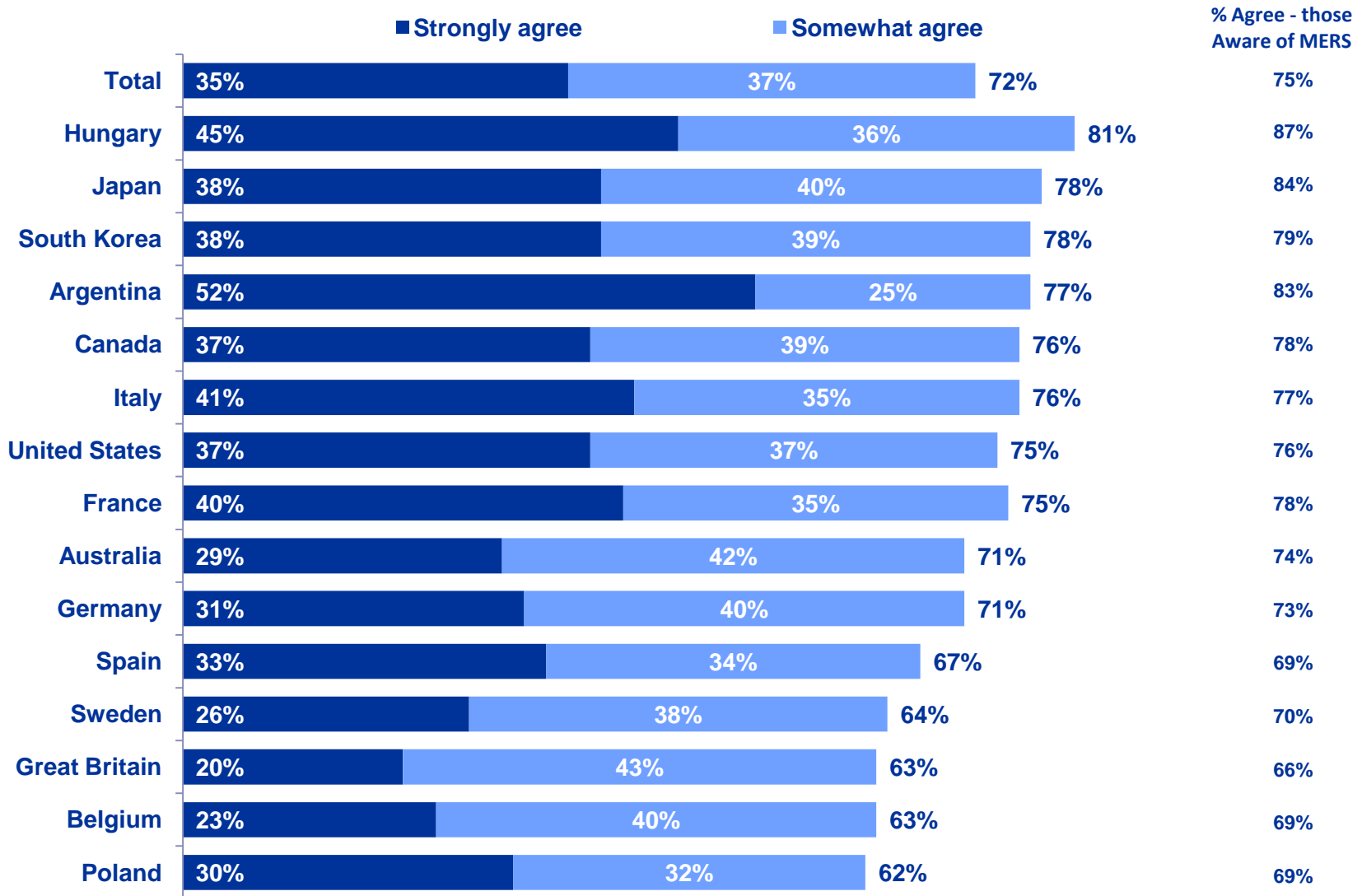


HL3.3. [Travelers entering my country who have been in any of the countries where MERS has been present should be screened by a health professional before entering.] To what extent do you agree or disagree with the following statements?



3/4's Generally (72%) and Those Aware (75%) Would Consider Cancelling or Delaying Travel If They Discover Intended Destination Has MERS Cases...

View of the General Population in 15 More Developed Nations



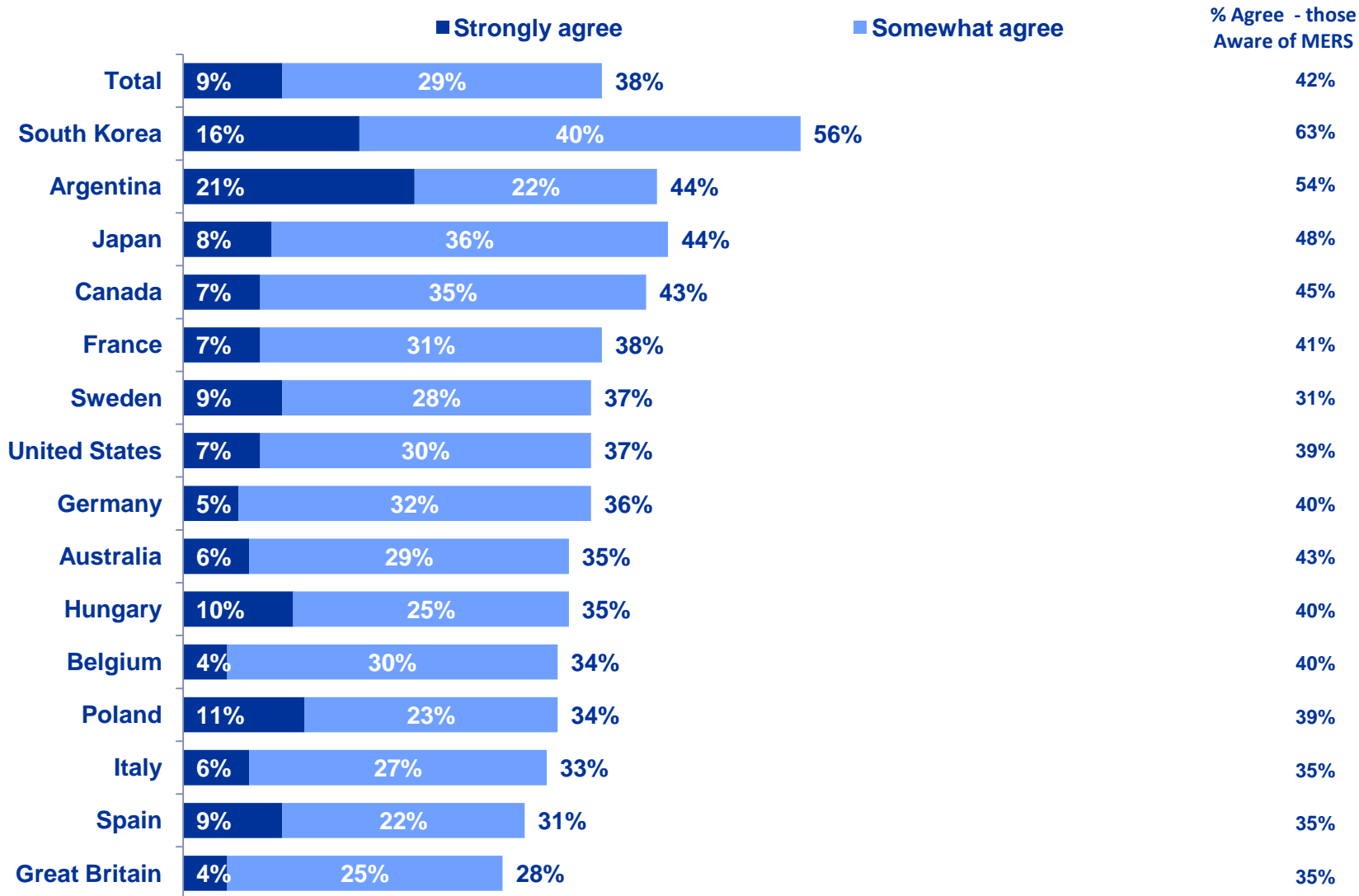
HL3.4. [I will consider cancelling or delaying travel if I found out the country I wanted to visit had experienced any cases of MERS.] To what extent do you agree or disagree with the following statements?



4 in 10 (38%) Generally and of Those Aware (42%)

View of the General Population
in 15 More Developed Nations

Agree their Government has “Taken Appropriate Steps to Screen Travelers Entering Their Country to Prevent Spread of MERS” ...



HL3.2. [My government has taken appropriate steps to screen travelers coming into my country to prevent the spread of MERS.] To what extent do you agree or disagree with the following statements?



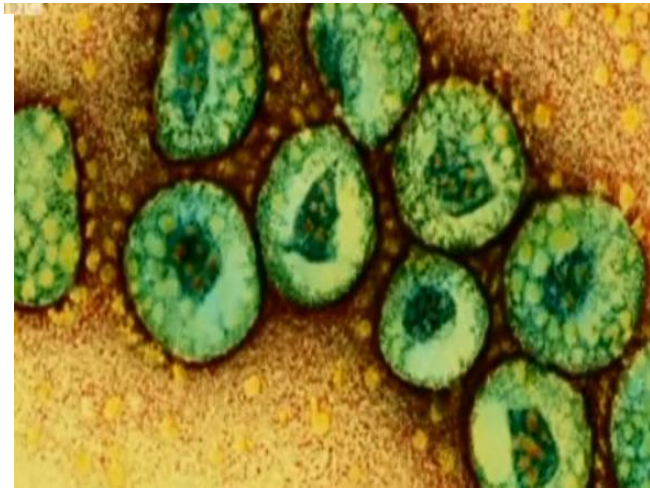
Global @dvisor

Views of Upper Deck Consumer Citizens in 9 Developing Nations

Brazil, China, India, Indonesia, Mexico, Russia, Saudi Arabia, South Africa and Turkey.

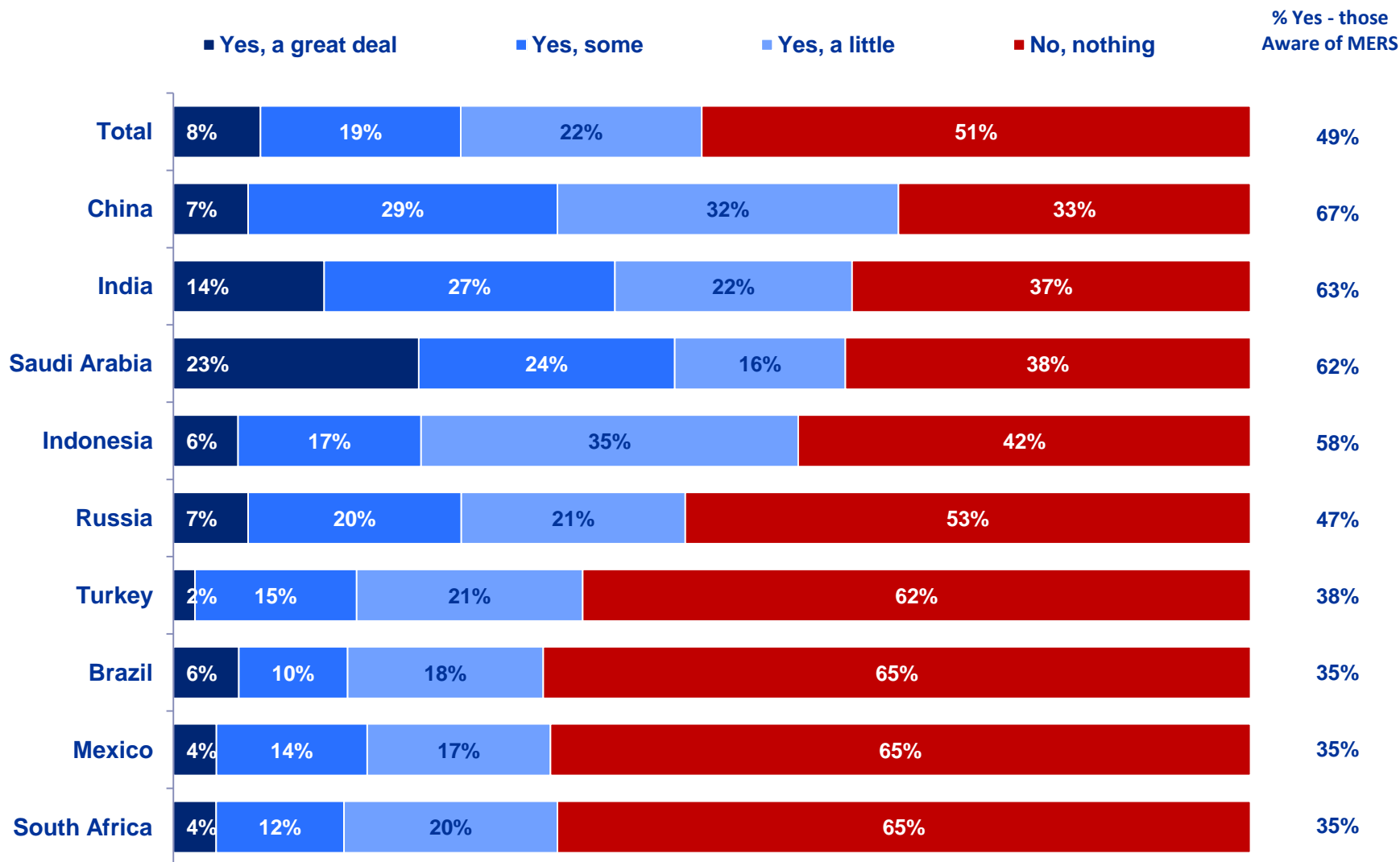


World Health Organization



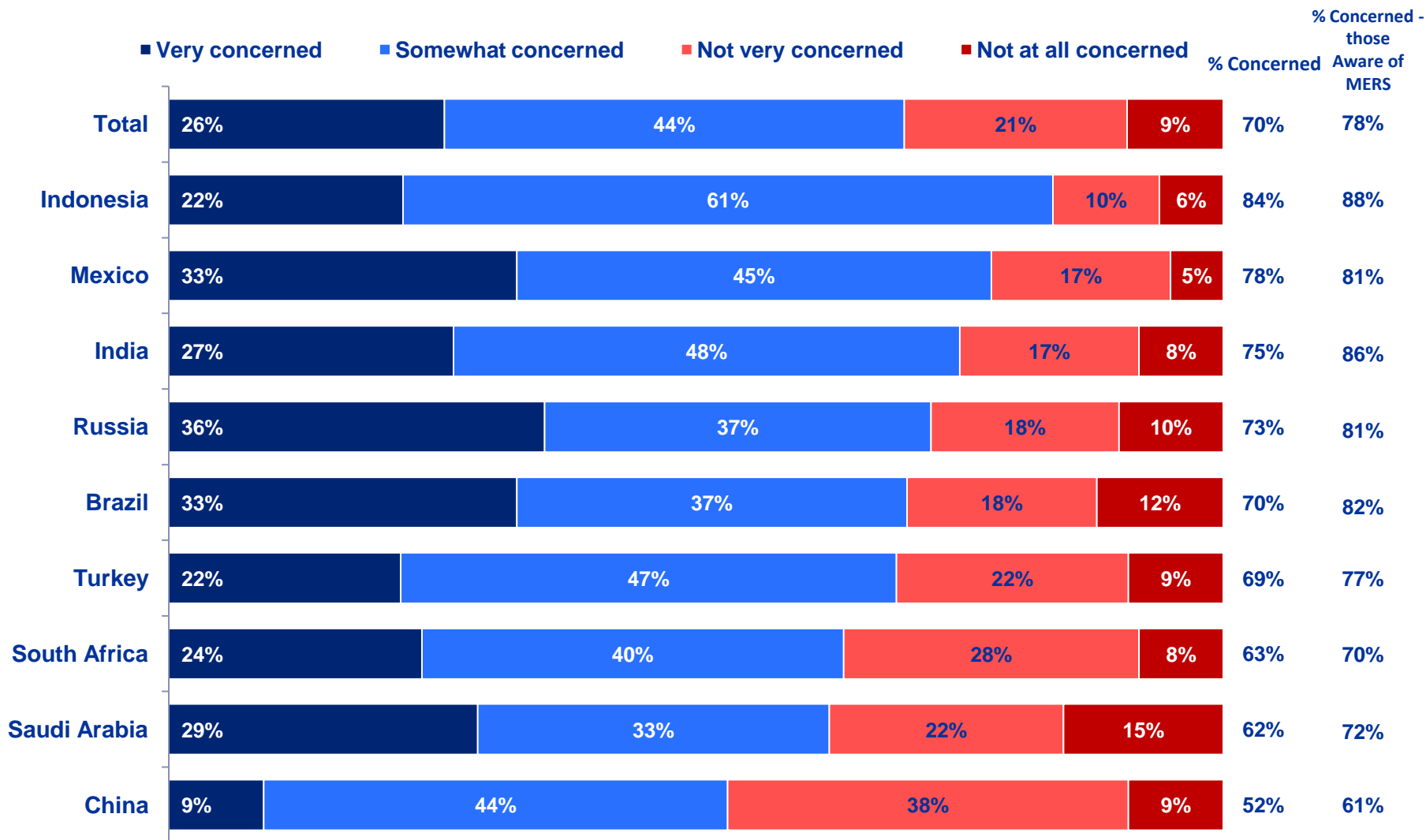
In Developing Nations, Half (49%) of *Upper Deck* Consumer Citizens Aware of MERS...

View of the upper deck citizen Population in 9 Developing Nations



Majority (70%) Generally and of Those Aware (78%) are Concerned MERS Might Come to Their Country...

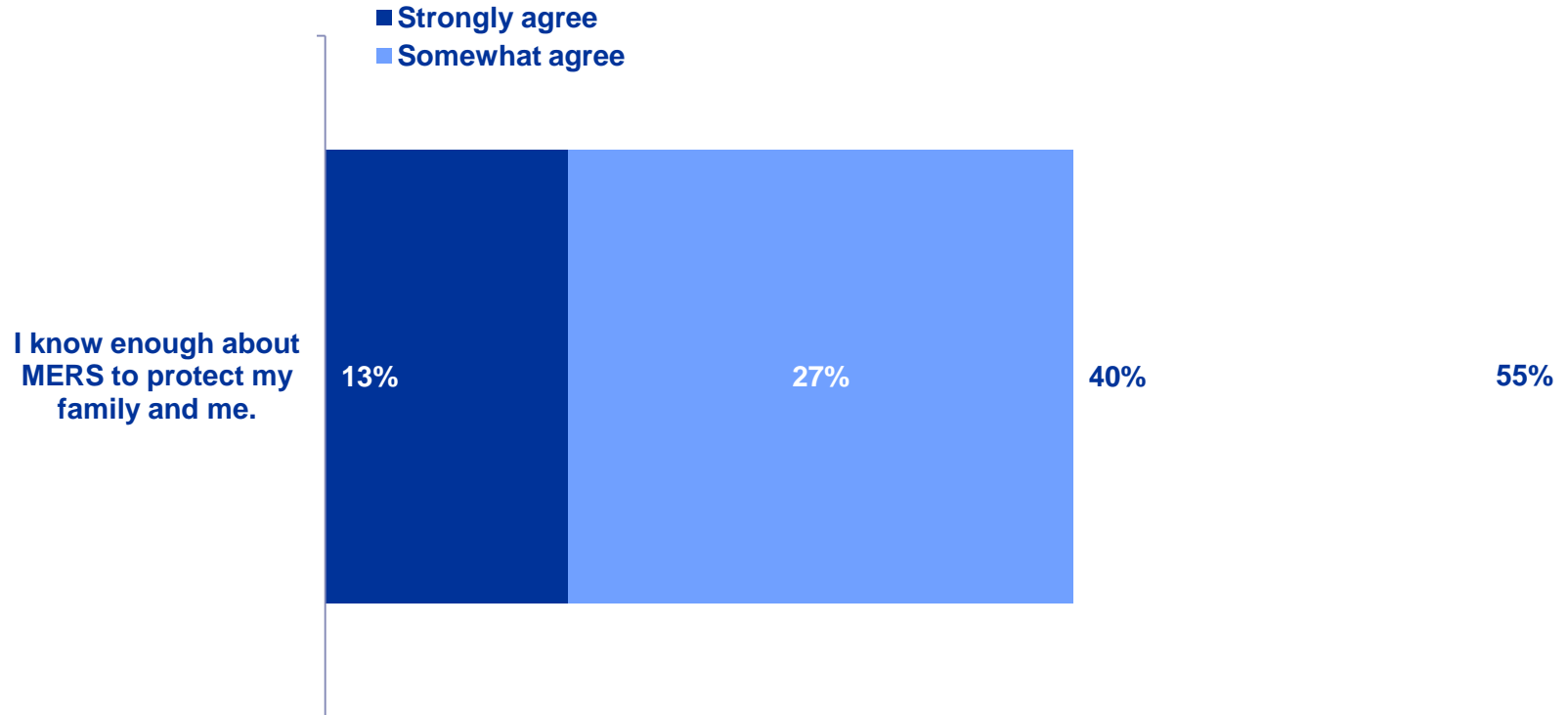
View of the upper deck citizen Population in 9 Developing Nations



40% of Upper Deck Consumer Citizens (55% of Those Aware of MERS) Believe they Know Enough About MERS to Protect Their Family and Themselves...

View of the *upper deck* citizen Population in 9 Developing Nations

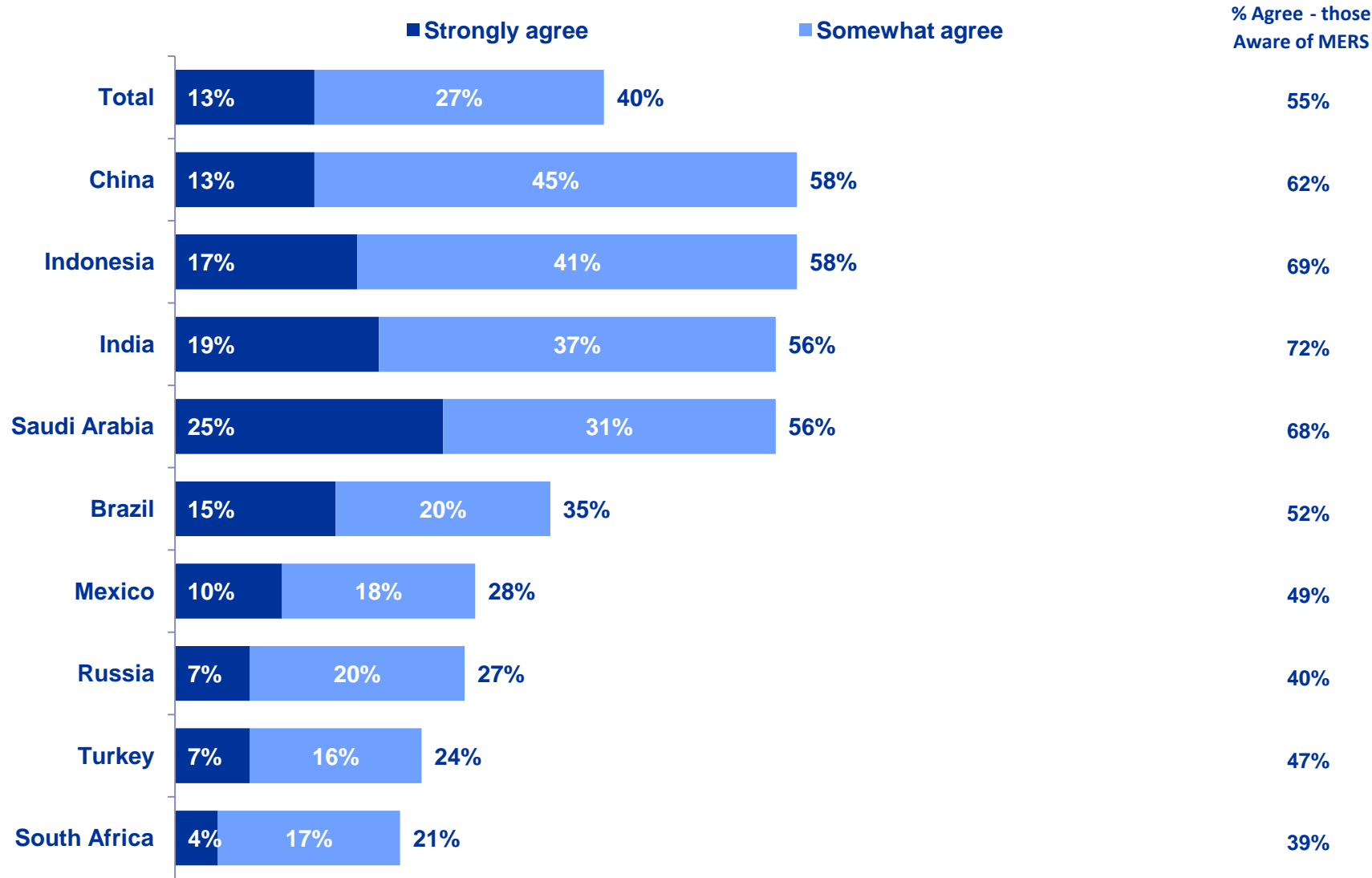
% Agree - those Aware of MERS





40% of All Upper Deck Consumer Citizens and 55% of Those Aware Agree They Know Enough About MERS to Protect Their Families and Themselves...

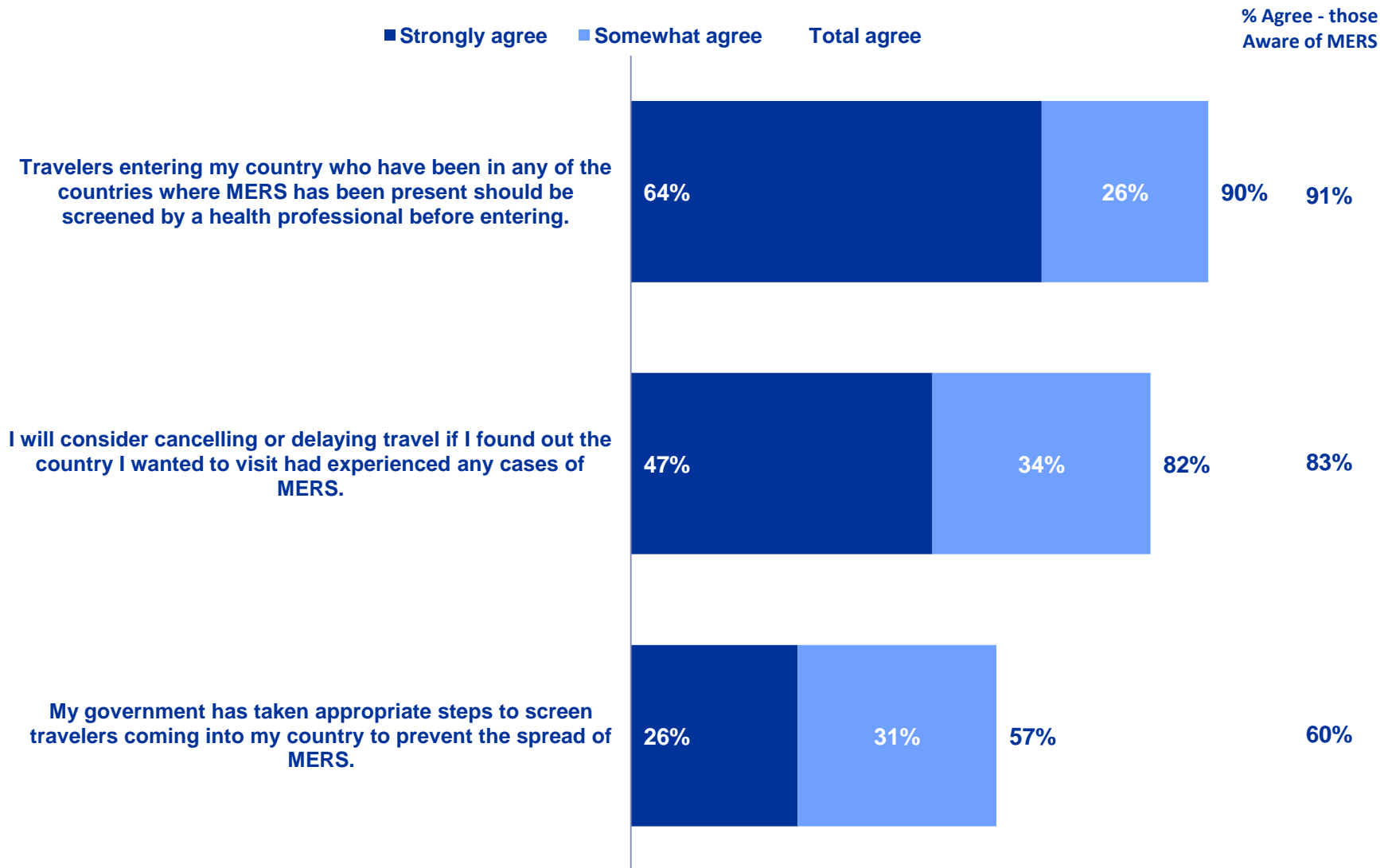
View of the upper deck citizen Population in 9 Developing Nations



HL3.1. [I know enough about MERS to protect my family and me.] To what extent do you agree or disagree with the following statements?

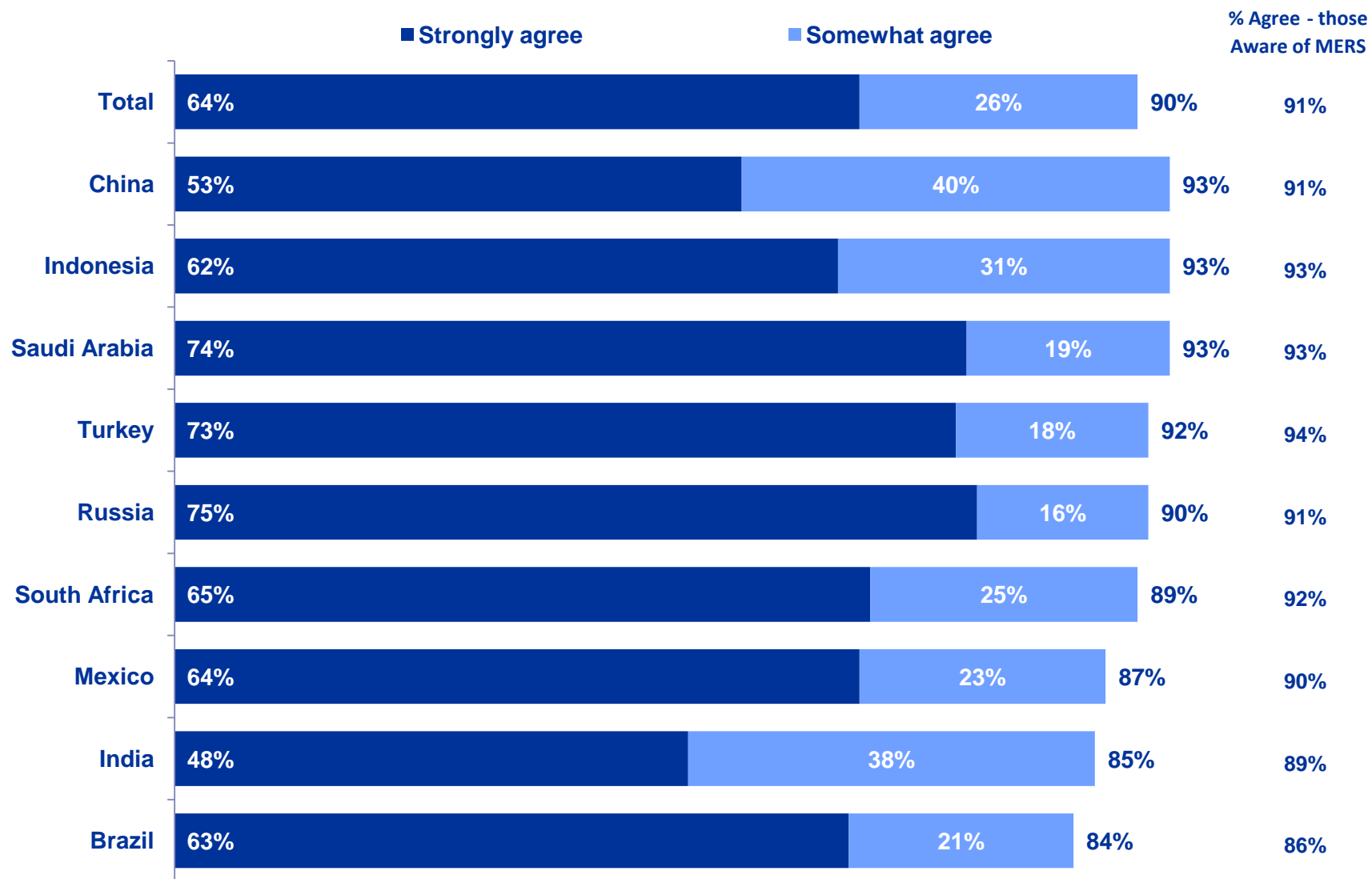
Strong Majority of Upper Deck Respondents Concerned About Travelers Entering Their Country (90%), and May Alter Travel Plans (82%) But Fairly Good Marks (57%) for Government Action...

View of the upper deck citizen Population in 9 Developing Nations



Strong Majority (90%) of All Upper Deck Consumer Citizens and Those Aware (91%) Agree Travelers Coming From MERS-Affected Places Should Be Screened...

View of the upper deck citizen Population in 9 Developing Nations

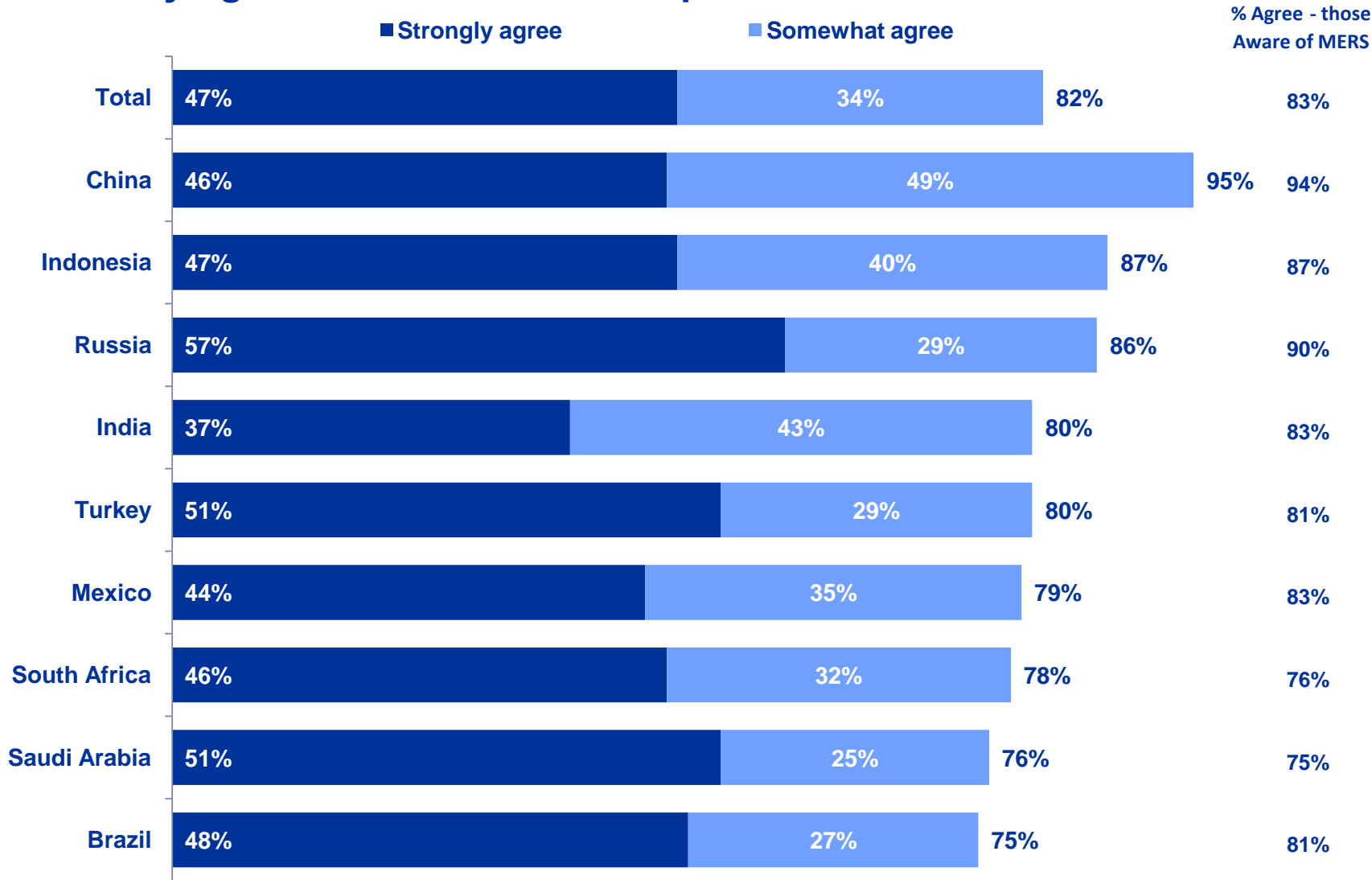


HL3.3. [Travelers entering my country who have been in any of the countries where MERS has been present should be screened by a health professional before entering.] To what extent do you agree or disagree with the following statements?



82% of Upper Deck Consumer Citizens and Those Aware (83%) Agree They Would Consider Cancelling/ Delaying Travel If Destination Experiences MERS Cases...

View of the upper deck citizen Population in 9 Developing Nations

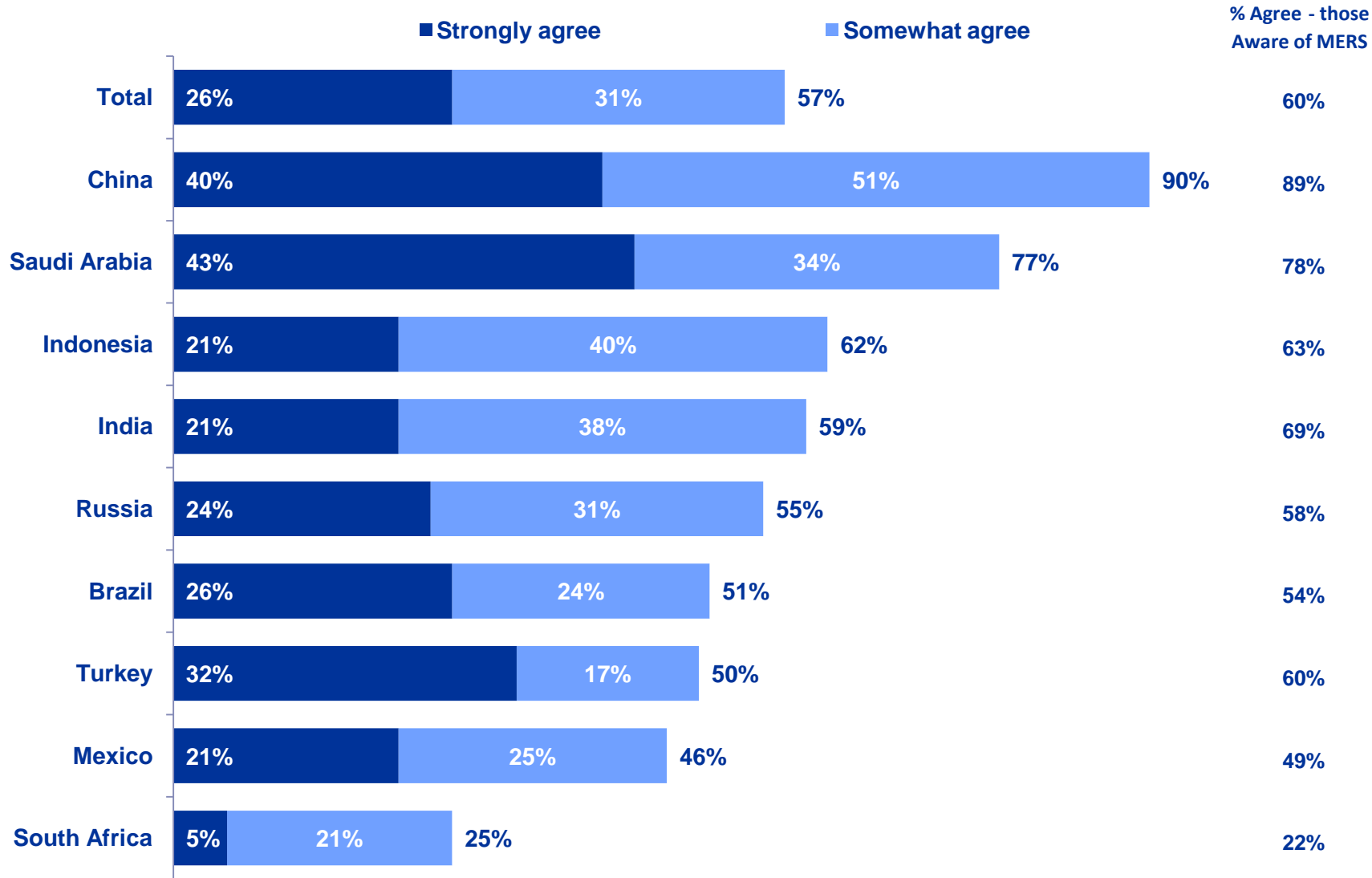


HL3.4. [I will consider cancelling or delaying travel if I found out the country I wanted to visit had experienced any cases of MERS.] To what extent do you agree or disagree with the following statements?



57% of All Upper Deck Consumer Citizens and 60% of Those Aware Agree Government has Taken Appropriate Steps to Screen Travelers Entering Their Country to Prevent Spread of MERS...

View of the upper deck citizen Population in 9 Developing Nations



HL3.2. [My government has taken appropriate steps to screen travelers coming into my country to prevent the spread of MERS.] To what extent do you agree or disagree with the following statements?

A Global @dvisory – July 2013 – G@45 MERS



About Ipsos

- Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. In October 2011 Ipsos completed the acquisition of Synovate. The combination forms the world's third largest market research company.
- With offices in 84 countries, Ipsos delivers insightful expertise across six research specializations: advertising, customer loyalty, marketing, media, public affairs research, and survey management.
- Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.
- Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,363 billion (1.897 billion USD) in 2011.
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- The Ipsos *Global @dvisor* Syndicate Study is a monthly, online survey of consumer citizens in 24 countries and produces syndicated reports and studies specifically tailored to the needs of corporations, advertising and PR agencies, institutions and governments. For information contact:

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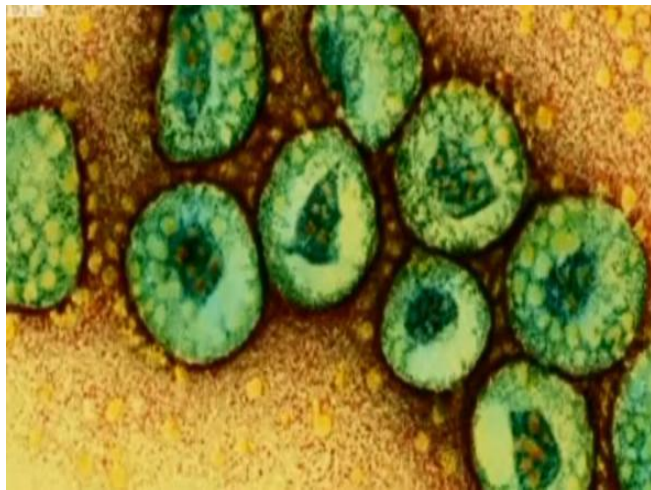
Global @dvisor

Example Template for Specific Country

Canada



<http://upload.wikimedia.org/wikipedia/commons/1/1c/BlankMap-World8.svg>



Summary for **Canada**

- Of the 15 more developed nations studied, four in ten (39%) general population citizens are aware of MERS. Canada is equal with the global average at 38% awareness and ranks ninth out of 15.
- A majority of citizens generally (59%) and amongst those aware of MERS (65%) across the 15 countries are concerned that MERS may come to their country in the near future. Canadians rank higher than the global average on both counts – 62% generally are concerned and 70% of those aware of MERS are concerned. This ranks Canada sixth out of 15 countries surveyed for the general population average and fifth amongst those aware.
- Globally, only two in ten (18%) generally and 28% of citizens aware of MERS on average in all 15 representative countries agree they “know enough about MERS to protect their families and themselves”. Canada is at roughly the global average among its own citizens generally (20%) and six points higher (34%) in comparison to others who are aware of MERS in other countries. Overall, Canada ranks fifth among the general populations surveyed in 15 countries and fourth amongst those aware.

Summary for **Canada**

- A vast majority (80% generally and 82% of those aware) of respondents on average in the 15 countries surveyed believe that travelers entering their country who have been in MERS-affected countries should be screened by health professionals first. In Canada, 88% of both its general citizens and those aware of MERS agree with this proposition. Canadians rank third out of 15 countries on this measure among the general population and tied with three other countries (Australia France and Hungary) among those aware for third place.
- Majorities in all 15 countries studied agree that they would consider cancelling or delaying travel if they found out the country they wanted to visit has experienced any cases of MERS (72% among the general population and 75% among those aware). Canada is that 76% among the general population – four points higher than the global average and ranked at the fifth of 15 countries – and at 78% – three points higher than the global average among those aware and ranked fifth out of 15 (tied with France).

- Four in ten (38%) generally and aware of MERS (42%) citizens in the 15 more developed nations surveyed agree that their government has taken appropriate steps to screen travelers entering their country to prevent spread of MERS. In Canada this is five points higher than the multi-country average at 44% among the general population and at 45% among those who are aware of MERS—ranking Canada fourth out of 15 on both counts.