



A crisis of trust? Europeans count on conventional medicine and healthcare systems – mostly

- 71 % of Europeans remain satisfied with their healthcare system
- Doctors and nurses named most important actors in dealing with Covid (81 %)
- Politicians deemed less trustworthy than pharmaceutical companies
- Approval of remote treatment via webcam on the decline – despite Covid

No other event in recent world history has changed our lives as fundamentally as the Covid pandemic. Seemingly overnight, everything changed. When Europe went into lockdown, its population went into a combination of hibernation and survival mode, stepping back to make room for the people in charge: especially for front-line workers, who were charged primarily to get us back on track. Without a doubt, there is much to come to terms with in the aftermath of the pandemic. Not only the lives to be mourned, but also how the situation was dealt with in general. Covid has left its mark on Europeans, so much is clear. But how will we come out on the other side of this? What have we learned? Who will we trust? Who has some catching up to do after the pandemic, and what does this mean for our future?

Slight decrease in satisfaction with healthcare systems

Despite hundreds of thousands of casualties caused by Covid across Europe, approval of healthcare systems remains relatively stable: Whereas in February 2020, 74 % of Europeans were satisfied with the healthcare system in their respective countries, this figure has decreased by a hardly noticeable 3 % across a somewhat expanded sample of countries.

Though the overall picture remains almost identical, proportionate shifts have taken place – and while it might be

a tempting assumption, these changes cannot be automatically attributed to national Covid-mortality rates. In the UK, the country which mourned the most deaths during the pandemic in Europe, satisfaction with the healthcare system has increased significantly from 85 % in early 2020 to 91 %. Countries with similar developments include Russia (34 % in 2020 to 41 % in 2021), Serbia (37 % to 49 %) and, though less pronounced, Germany (80 % in 2020 to 82 % in 2021).

Switzerland (91 %), Belgium and Austria (89 %), the Czech Republic (83 %), France (85 %) and Spain (80 %) are either satisfied or very satisfied with their healthcare systems, although support has slightly wavered in the five countries that were included in the 2020 survey. At 79 %, the Dutch are still considerably content. Portugal (74 %) and Italy (69 %) are somewhere in the middle, while Poland (36 %) and Ukraine (25 %) are least satisfied. Although the overall satisfaction with healthcare systems has remained stable, many respondents do not believe that their country would be better prepared for a future crisis: 1 in 3 Europeans are either convinced that any attempts to plan ahead for a pandemic would be in vain (20 %) or that their healthcare system would probably fail (15 %). The remaining 59 % are more optimistic – however, almost 1 in 2 people (46 %) still believe that much is to be learned from Covid.



15 %

think their healthcare system would probably fail in another pandemic.

Doctors and nurses steal the show – and rightfully so

With everything left to process once we leave the pandemic behind, Europeans are very much aware that it is first and foremost thanks to the relentless dedication and commitment of doctors, nurses and other medical staff that we are on the mend. 81 % of Europeans say that medical professionals have been the most important contributors in overcoming Covid. Pharmacists come in at second place (49 %), closely followed by pharmaceutical companies (47 %). Considering all the rules and restrictions they abided by for months to avoid the spread of the virus, 1 in 3 Europeans see it fit to pat themselves on the back for their efforts. Neither politicians nor the media reap much gratitude for their actions – or lack thereof – during Covid: together, they occupy the back ranks with 22 % each.

Pharmaceutical companies deemed more credible than politicians

The perceived contribution of the abovementioned groups to the Covid crisis can also be linked to their credibility and trustworthiness regarding health matters. Doctors remain the most reliable source of information for Europeans (73 %) and are closely followed by pharmacists and scientists (60 %). While 24 % trust health-related information shared by pharmaceutical companies, only 7 % can confidently say the same about politicians. At 29 %, specialised health media are much more credible than the general media (10 %).

Health influencers appeal mainly to the young

With 54 % of Europeans declaring that they have increased their online searches for health topics over the past year,

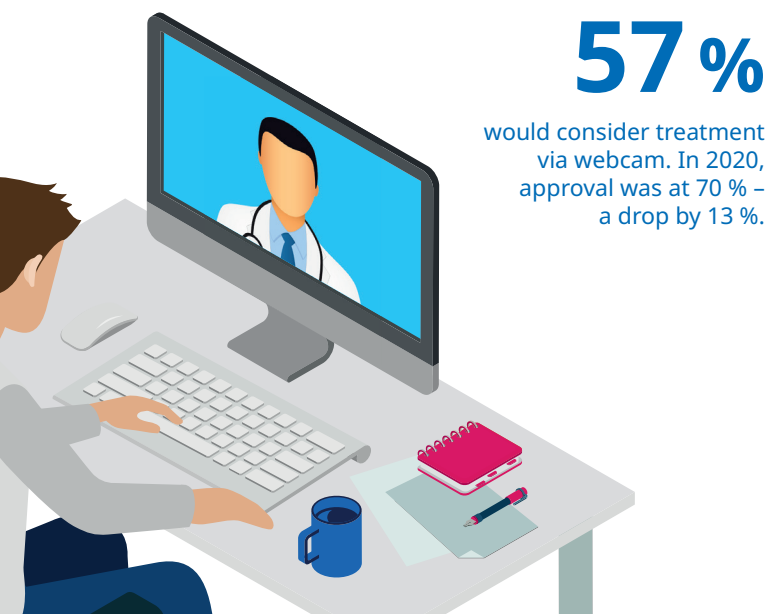
what role do health influencers play for Europeans in our day and age? While many of us have inarguably spent a lot of time on our phones – even more so during lockdown – online personalities seem to have played a modest role in challenging longstanding health habits. The majority of Europeans remain yet to be won over by healthcare influencers: Only 7 % confess they have ever been inspired to become healthier by an online personality. However, among people between the ages of 18 and 34, this number is almost twice as high at 13 %. This increase is easily explicable with a glance at their user habits, with the majority of young adults frequenting various social media platforms daily.

Nevertheless, many Europeans are recognising the role online personalities have come to play in recent years. Across the continent, a little over 1 in 5 Europeans say influencers have gained some more authority during the pandemic, but remain cautious of them due to their lack of medical knowledge. An additional 23 % of Europeans are convinced influencers have gained additional overall relevance due to Covid, however they remain mostly irrelevant to their lives. While 13 % of Europeans believe that online personalities will soon become more influential for health-related topics, 36 % find this to be rather unlikely.

Europe fed up with webcams, causing approval for online consultations to slide

Granted, we have all had our fair share of online-meetings during the pandemic: be it work-related or with friends and family. Resulting from that is a certain webcam-fatigue that has taken over Europe – and evidently, it also includes virtual consultation hours. The digital communication channels many GPs set up in lieu of in-person appointments to keep waiting rooms from filling up are waning in popularity: In comparison to 70 % of Europeans who were ready to embrace a consultation via webcam in 2020, a more balanced 57 % approve of remote treatment in 2021.

The European's trust in conventional medicine, however, is a constant in unsteady times: 68% of the population count on it – a slight decrease compared to 2020, where the approval rate was two percent higher. The UK (83 %) and Spain (80 %) are the most passionate advocates for conventional medicine, while Serbians prefer to stay up to date on alternative and homeopathic treatments (31 %). Notably, men tend to rely more on conventional medicine (73 %) than women (64 %).





The monster at our doorstep: How COVID-19 has affected our mental health

- Almost 1 in 3 Europeans report increased levels of anxiety due to the pandemic
- Inner restlessness and stress affect one in four Europeans, 15 % have trouble sleeping
- Self-assessed percentage of Europeans at risk of burnout remains high at 54 %
- Europeans are less bothered by the possibility of contracting COVID-19 than being unable to meet with family and friends

The challenges the last few months held for Europeans were manifold. But even amid hundreds of thousands of COVID-19 induced casualties across the continent, daily life went on: granted, in a fundamentally different way. In addition to newly required organisational skills to reconcile round the clock childcare with a 9 to 5 job, the danger of being infected with the virus loomed seemingly everywhere. Measures taken to prevent the further spread of COVID-19 caused families and friends to be separated for long periods of time, leaving many to feel lonely and isolated, exacerbating existing mental health issues and undoubtedly breeding new ones. What did Europeans worry about most during these trying times? What helped them to stay strong? Are we already on the verge of a new pandemic, namely that of mental health issues?

Need for human contact trumps fear of infection

Out of all the challenges they have faced since the beginning of the pandemic, more than half of Europeans (52 %) feel that being unable to see their families and friends has been their greatest burden. This is especially true for people in France and Austria (63 %), the UK (62 %) and Switzerland (61 %). Becoming infected with COVID-19 is the second most stressful idea for people across the continent: 42 % of Europeans are worried

about contracting the virus.

This fear is particularly pronounced in countries with high mortality rates, especially Spain (54 %) and Italy (53 %). Possible financial and professional repercussions of the pandemic are causing roughly one third of Europeans (32 %) to worry

about what will happen after Corona. Loneliness, a potential trigger and simultaneous result of mental health issues, is affecting around one in four Europeans (26 %). Italians feel particularly forlorn: One in three (33 %) report feeling isolated in their homes. In Russia, on the other hand, people do not seem to mind staying at home nearly as much (17 %). Notably, young Europeans (33 %) are more likely to experience feelings of loneliness than people aged between 50 and 99 (24 %).



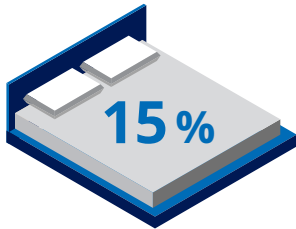
42 %

of Europeans are worried about contracting the virus.

Due to travel restrictions and quarantine requirements, escaping the “new normal” by going on holiday has been out of the question for the vast majority of people. Roughly one in four (24 %) Europeans feel that not getting a little time away from home has been one of the things that most affected them. Germans (35 %) and Belgians (31 %) are among those who are particularly fed up after staying home for the better part of the recent months. With almost one in five people across the continent (19 %) admitting to feeling overwhelmed by everyday life with working from home, home schooling and the like, this appears to be a reasonable enough belief.

Lockdowns fuel anxiety and stress

Almost one in three Europeans (29 %) say they now feel more anxious than prior to the pandemic. The proportion of people affected is particularly high in Ukraine (45 %) and Poland (42 %). Stress and inner restlessness have also become a problem for one in four Europeans (25 %). Across all nationalities surveyed, Czechs and Serbs are most troubled by this – there, almost one in three



of Europeans are having trouble sleeping due to the pandemic.

people struggle to unwind (31 % each). On top of that, 15 % of Europeans are having trouble sleeping due to the pandemic. Online classes for yoga or meditation that aim to help people reduce stress do not seem to do it for Europeans: 11 % have given them a try.

Lockdowns have not only taken their toll on people's psyche: 19 % of respondents say that changes in their everyday lives are having a significant impact on their physical fitness. With gyms, swimming pools and other sports facilities closed for months on end, this comes as no surprise. One in ten Europeans are counteracting this with the targeted intake of nutritional supplements and vitamins in an attempt to do their bodies some good.

Remarkably, the people that remains largely unfazed by all this are the Dutch: 44 % report that they have not noticed any effects of the pandemic on their general or mental well-

being – across Europe, this applies to just under one in three people (32 %). A full 37 % of male respondents say they have not observed any changes worth mentioning – compared to only 27 % of women, who generally feel more anxious and stressed. Another compelling finding: Young people between the ages of 18 and 34 are generally more stressed, more frequently experience anxiety and sleep worse than people between the ages of 50 and 99 who are, generally speaking, more at risk of suffering from a serious disease. This illustrates that, while COVID-19 is a major threat to any person's physical health, the psychological implications of the measures taken to combat it have left significant damage in their wake, the extent of which we are yet to discover.

Burnout: One of the few constants in times of the Covid pandemic

Among all the psychological consequences of this past year, one of the usual suspects must not be missed: Compared to 2019, the proportion of those who have already suffered from burnout or know the feeling of being on the verge of it remains unchanged at 54 %. It is not unlikely that this number may increase significantly in the coming months and years due to the long-term effects of the pandemic.

Today, 38 % of respondents say they have never had the feeling of being a risk candidate for burnout – in Portugal (47 %) people do not worry too much about this. A mere 8 % of Europeans are convinced that they will probably never suffer from burnout.

2 in 3 familiar with feelings of burnout

65 %

of 18 – 34 year old women have had a burnout or the feeling of being on the verge of it. Average of all respondents: 54 %.





Stay home, stay healthy: Has Covid changed our health habits for good?

- Community pharmacies still most popular place to buy medication for 43 % of Europeans
- 22 % of Europeans plan to continue wearing a face mask post Covid
- 45 % of Europeans paid more attention to healthy eating during the pandemic
- Brand name more important to Europeans than environmental factors when purchasing medicine and food supplements

With most of social life on hold for months on end, Covid has given us ample opportunity to take a step back and evaluate our current routines with regard to their health benefits. It seems that some of the habits that were created during the pandemic – whether self-induced or imposed by the government – are either unlikely to be abandoned completely post Covid or will have at least helped some Europeans make it through these difficult months. What did Europeans change during the pandemic, and which of those changes are likely to persist?

Hands, face, space

Among all restrictions that came with Covid, the ones regulating behaviour in the public space seem to be more than temporarily tolerable for a considerable number of Europeans. Post Covid, 45 % vow to carry on washing their hands more regularly to avoid spreading germs, 1 in 3

Europeans want to continue to keep the advised minimum distance and 22 % even plan

on wearing a face mask in public. Perhaps unsurprisingly, amid the countries that harbour the majority of supporters of these mea-

sures are those that recorded a particularly high mortality rate. Frequent hand washing will continue to be a part of everyday life for the majority of Italians and Ukrainians (53 %) as well as the Portuguese (52 %). Face coverings could remain especially popular in the UK (38 %).

Needless to say, keeping a clean home is just as relevant as basic hygiene in times of a pandemic. Almost 1 in 3 Europeans (31 %) claim they will use cleaning agents with disinfecting properties more regularly in the future. The Dutch are least tickled by this idea – only 1 in 5 would consider disinfecting their homes going forward. This reluctance is easily explained with a glance at their self-assessment regarding hygiene standards prior to the pandemic: Aside from Serbia (42 %), no other nation is as confident in their level of cleanliness as the Dutch (40 %).

COVID made Europeans ... somewhat healthier?

Speaking of habits: Many Europeans used the time that opened up during Covid to make some health-related changes in their lives – probably not least because they figured a healthier lifestyle could only do them good in avoiding falling ill with the virus. A total of 70 % of Europeans also showed an amplified willingness to invest more money and time in their health.

During the pandemic, 45 % of Europeans paid more attention to their diet and ate more healthily. This goes hand in hand with an increased readiness to pay more for fresh and high-quality foods (42 %). People in Serbia (54 %) and



22 %

want to continue to wear face masks in the future, e.g. on public transport.

Pharmacy remains preferred place to shop for OTC-medication



43 %

would continue to buy their medication from the pharmacy if given the choice.



the Czech Republic (50 %) were particularly selective as to what foods they use to fuel their bodies. Belgians, on the other hand, are yet to discover their passion for nutrition, as only 37 % of them felt inclined to spend more time in the kitchen during the pandemic. Perhaps the Spanish could share some cooking advice: 57 % of them recently devoted more energy to eating healthy, after all.

Nutritional supplements are a popular way of providing additional vitamins and minerals for the body: 73 % of Europeans purchase them regularly. In addition to spending more money on healthy produce, people in Eastern European countries also come in at first place with regard to nutritional supplements. Almost half of the Serbian population (49 %), 47 % of Czechs and 42 % of Poles increased their intake of food supplements – compared to only 29 % on average across Europe.

Physical exercise played an important role for 35 % of Europeans. Fitness apps or online courses, however, were not particularly popular (16 %). People in Germany were among those who found it a bit harder to motivate themselves to get off the couch and get moving recently (29 %). Overall, Europeans are unlikely to blindly jump on any fitness trend coming their way: Only 38 % have been gotten sucked into a temporary health craze or think these should become more of a lifestyle, while 42 % are generally wary of such developments. Still, 20 % have made it their mission to pay more attention to their fitness and nutrition in the future – with or without a trend to go along with it.

Pharmacy remains preferred place to shop for OTC-medication – and getting advice

With an increased interest in and an aspiration to healthy living, how did people in Europe procure information on these topics? The short answer is: The internet. 54 % of Europeans have increased their online searches for health-related information compared to previous years. Interestingly though, this does not automatically mean they bypass their pharmacist when acquiring medication – or information about it.

Despite Covid, only 14 % of Europeans have ordered more OTC-medicines via online pharmacies – 43 % flat out refuse to order them online altogether. Regardless of an increasing number of online platforms and other channels for obtaining medication, community pharmacies are still Europe's first choice for over-the-counter medicines. When asked where they would prefer to purchase over-the-counter medication if they had free choice, a substantial share of respondents (43 %) mention community pharmacies as their first pick, 13 % of them being particularly partial to their local branch. People in Poland (46 %) and Russia (44 %) are extraordinarily supportive of bricks-and-mortar pharmacies



14 %

of Europeans have ordered more medicines via online pharmacies.

generally while people in Serbia remain forever faithful to their local pharmacist (42 %). The remaining outlets include drugstores (21 %), supermarkets (15 %), online pharmacies (12 %), mail-order companies such as Amazon and the like (5 %) as well as parapharmacies, particularly in Portugal (36 %) and Spain (26 %). In the UK, which has a comprehensive general-sale offering, more than 1 in 2 people (55 %) purchase their OTC medication at a supermarket, while drugstores are exceedingly popular in the Netherlands (58 %). In Switzerland, every third person picks up their medication there. Despite their support for bricks-and-mortar pharmacies, Russians are also most likely to purchase medication online (25 %).

One decisive advantage community pharmacies have over all other channels might well be in-person consultation, the importance of which has remained stable over the last year. Compared to last year's survey, figures for internet searches dropped slightly (from 39 to 36 %) despite the self-observed increase in search requests, while the number of people who said they turn to their pharmacist for information on medication intake remained steady at 40 %. The relevance of input from doctors has decreased from 51 to 39 % – probably not least because many people avoided seeing their GP altogether unless it was truly necessary to avoid risking an infection with Covid. People have also become less likely to consult instructions in packs: Compared to 61 % in 2020, now only 53 % say they first look to the package leaflet for information on their medicine.

Medication: Brand name more important than sustainability

Whether they buy them online, from their local pharmacist or any other place: What is most important to Europeans when it comes to purchasing medicines and food supplements? For 38 %, it is the brand name and what they associate with it – trust plays a crucial role here. In Ukraine (47 %) and Portugal (46 %), people pay special attention to this detail. Environmentally friendly and sustainable packaging comes in second as a decisive factor for 1 in 4 Europeans, while 1 in 5 prefer medication that is produced in Europe. Austrians (35 %) are particularly aware of where their meds come from. Suitability for people with food intolerances plays a minor role (16 %), along with labelling for specific dietary or religious requirements like “vegan” and “vegetarian” (9 %) as well as “Halal” (4 %). Overall, 31 % trust that “doctor knows best” and take the medication that their physician prescribes. In Belgium and France, people are least likely to second-guess their doctor's orders (39 and 38 %). A recommendation from their pharmacist is a good enough quality feature for 17 % of Europeans.





30,013

respondents between the ages
of 18 and 99 from
15 European countries



03/21 – 04/21

inquiry period of
online survey



Topic

How has the pandemic
changed Europeans'
views on health?



Initiator

STADA Arzneimittel AG in
cooperation with Kantar

Point of departure, objectives and methodology

In the spring of 2020, COVID-19 began to spread across Europe – with devastating consequences. For healthcare professionals, who are continuously being pushed to their limits and beyond due to the pandemic, as well as every single one of us, whose lives have been severely restricted and who have, perhaps, even lost a loved one to Covid. Living from lockdown to lockdown, we quickly came to understand: A vaccine against the virus is our best – and only – shot.

But has this affected people's attitudes towards vaccinations – especially compulsory vaccinations for certain diseases, as they already exist in some countries? Have Europeans invested more in their health during the last year? How are they holding up in general? How have their respective healthcare systems fared during the crisis? In whom do Europeans trust concerning health issues? Or, more generally speaking: What has Covid done to Europeans?

A brief review

The STADA Health Report was originally conceptualised as a German study on "Health Literacy" and was carried out four times for this purpose. In 2018, the report had its international debut: With a focus on the ever-progressing digitisation of the health sector, Europeans between the ages of 18 and 99 were asked about their knowledge, wishes and fears on this topic. Last year, polarising topics such as "vaccinations and immunities", "sex and health" and "the afterlife" were added to the survey. Also, the number of countries involved in the STADA Health Report has almost doubled over the last two years.

Sample and methodology 2021

In 2021, the cross-national survey was again carried out by the consulting and market research company Kantar. It was conducted via an online questionnaire from mid-March until mid-April 2021 in the following 15 countries: Austria, Belgium, the Czech Republic, France, Germany, Italy, the Netherlands, Poland, Portugal, Russia, Serbia, Spain, Switzerland, Ukraine, and the United Kingdom. The Czech Republic, the Netherlands, Portugal and Ukraine were first-time participants this year. Around 2,000 people were interviewed in each country. This results in a total of 30,013 respondents between the ages of 18 and 99, representative of the characteristics of gender, region and age.

The questionnaire included over 30 questions from eight categories. In accordance with STADA's mission statement Caring for People's Health as a Trusted Partner, these categories were then subdivided into the areas "Trust", "Care" and "Partner".

1. Health as a popular pastime
2. Health influencers
3. Healthcare systems
4. Preventive healthcare
5. Medication
6. Chronic diseases
7. Digital health
8. Mental health

Beyond that, each country had the opportunity to ask their respective population up to three individual questions.