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Barometer Bayer 2022

Warsaw, August /September 2022

Informacje o badaniu

Objectives

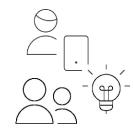
- To determine the level of knowledge related to water availability in Hungary and wordlwide. To identify attitudes toward the dangers concerning water shortages.
- To learn about opinions regarding taking care of oneself and one's health, and also about young people taking care for the elderly within the family.
- To investigate about new digital products and e-channels potential, as they keep emerging in health-related branches, already having influenced lives of people in need of the diagnosis or treatment.
- To capture viewpoints young Hungarians have on farmers' attitudes and actions related to drought. To recognize the level of safety when it comes to agriculture and crop protection products.

Sample

- Nationwide, representative of people aged 20 - 30 by:
 - Gender
 - Education
 - Region of residence
 - Size of locality
 - * Occupational situation
 - Involvement in agricultural production and horticulture.
- ✓ Total sample size HU N=499.

Methodology

✓ CAWI



Key insights

- ✓ Young Hungarians recognize the problem of water shortages (78% in Hungary, 88% globally). More of them think it could happen someday, in the long run (42%) and 1/3 of them (36%) believes that water scarcity in Hungary can become real in the near future.
- ✓ Responsibility for the threat of water shortages is placed by half of the young Hungarians on... themselves and other members of society (49%, regarding water shortages in Hungary, with women significantly more often indicating that than men). The 20-year-olds also attribute it to industry (nearly one in three), politicians and large corporations (one in four). Interestingly, not everyone responsible for the situation is regarded as one to fix it.
- Young Hungarians in general underestimate the water consumption levels in agriculture and industrial production.
- ✓ Symptoms of water scarcity: 89% of young Hungarians have personally encountered a significant increases in the prices of food. Withering of plants and trees, drying up rivers and other water reservoirs / wetlands got mentioned almost as freaquently (about 80% each).
- ✓ (62%) of 20-year-olds consider the current requirements for labelling and use of registered plant protection products as safe for the environment, including waters.

- ✓ Nearly half (47%) of 20-year-olds declare that healthy eating habits are important expressions of taking care of oneself, but only just under a third of respondents put this into practice.
- Two-thirds of twenty-year-olds (65%) have installed some health, exercise, diet or calorie-related application on their phones. Sports apps most popular (26%).
- ✓ The most popular reasons behind installing health-related apps are performance tracking (37%) and motivation to be active (30%).
- ✓ Nearly two thirds (61%) of 20-year-olds takes care of health of older people in their family. Personal visits lead 47%. One in three young Hungarians declare also providing vitamins and supplements to the elders, accompanying them at the doctor's and taking them for walks, excursions. Challenging elders least popular.
- Access to medical services is somewhat difficult, according to young Hungarians (62%). Even more often it's true among young Hungarian women (71%).
- Currently, medical or health e-services are rather unpopular among 20year-olds. One in three use sending a prescription code to their phone. The rest are used by a few to about a dozen percent.

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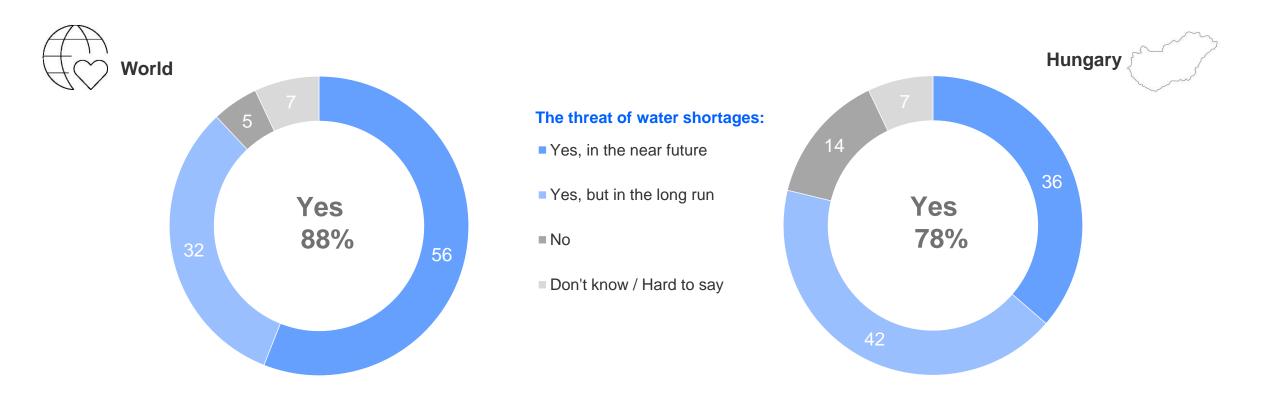
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01

Water resources in Hungary and worldwide. Attitudes towards the risks of water scarcity.

Could there be a shortage of water?

Young Hungarians recognize the problem of water shortages (78% in Hungary, 88% globally). More of them think it could happen someday, in the long run (42%) and 1/3 of them (36%) believes that water scarcity in Hungary can become real in the near future. When it comes to the world, the proportions are somewhat reversed.



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W1. Do you personally believe a worldwide shortage of water may occur? W2. Do you personally believe a shortage of water may occur in Hungary?



Who is responsible for the water problem in young Hungarians opinion? And who is there to fix it?

Responsibility for the threat of water shortages is primarily placed by young Hungarians on... themselves and other members of society (49%, regarding water shortages in Hungary, with women significantly more often indicating that). The 20-year-olds also attribute it to industry (nearly one in three), politicians and large corporations (one in four).

Interestingly, not everyone responsible for the situation is regarded as one to fix it. As far as society (everyone of us) is concerned, the results are consistent. However, industry and large companies are somehow 'absolved' of responsibility (30% vs 17% and 25% vs 16%). The second most frequently identified group responsible for taking action is politicians (36%).

	Those responsible for the current situation:	Responsible for counteraction:	
Every one of us	49	50	
Industry of all kinds	30	17	
Politicians	25	36	
Big companies	25	16	
International foundations and NGOs	9	9	
Owners of allotments and home gardens	8	5	
Heating services	8	3	
Foresters	5	6	
Farmers	5	8	
Mining industry	5	4	
Big IT companies	5	4	
Domestic foundations and NGOs	5	8	
I don't know/ It's hard to say	3	7	

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W3. Who or what do you think is responsible for the water shortage threat? W4. Assuming that there is a threat of water shortage in Hungary, who do you think should be in charge of containing this threat?

Significance testing at 95% confidence level against previous guarter/wave Base: total N=503, W3; N=458, Women N=231, W4, N=503, Men N=255

6

What activities do young Hungarians take to reduce water consumption?

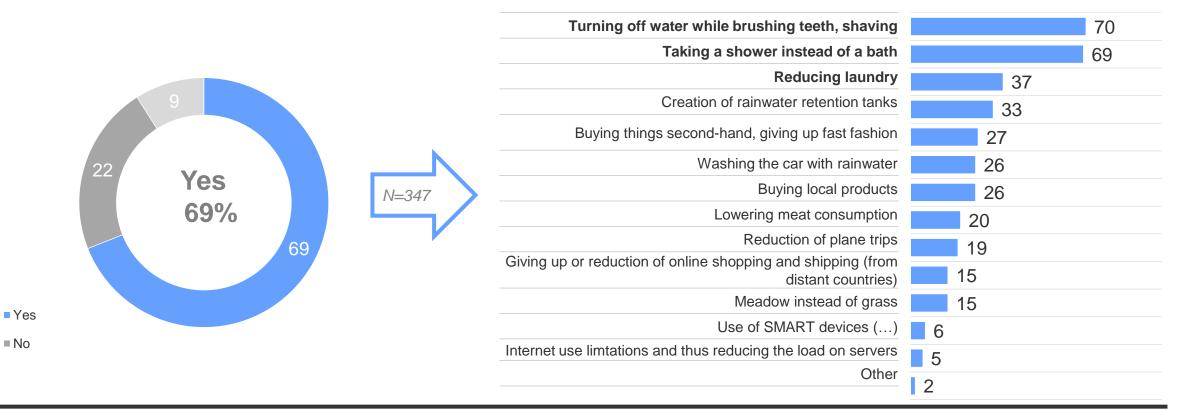
More than two-thirds of young Hungarians (69%) declare that they do take actions to reduce water usage. About 70% of them take those steps in their bathroom, reducing the use of running water and choosing to shower instead of taking a bath.

There is a noticeable consistency between the activities declared as possible to reduce water consumption (see previous slide) and the ones actually performer by the respondents.

Do you take action to mitigate water crisis?

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Types of activities taken:





Should crop irrigation be forbidden in times of drought? And car washing?

More than a half of young Hungarians (54%) doesn't see much problem in farmers watering the fields during water shortages. 35% is however to some extent convinced that's it's not right.

Opinions on washing the car when water is scarce are sharper; 72% of 20-year-olds condemn this in some way.

Irrigating plants during drought.

6 13 N=248 Young Hungarian women It should be banned judge this most harshly, 19 more harshly than their It is embarrassing and shameful peers (27 vs 32+). 33 It's not right, but it's not 54 particularly important It's normal, I don't see the 14 problem I don't know. 14 12 $(\mathbf{0})$

Washing the car during drought.

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W10. Imagine that there is a state of drought and you see your neighbour washing the car. How would you judge such behaviour? W11. Imagine that there is a state of drought and while driving through the countryside you notice that a

farmer is watering the plants in the field. How do you evaluate this behaviour?



What symptoms of water scarcity have young Hungarians experienced themselves?

There is no doubt that young Hungarians have personally experienced many of the symptoms associated with water shortages in the country: the majority of effects were indicated by more than half of the respondents.

The vast majority of 20-year-olds mentioned increases in the price of food (89%) and heating (82%). But it's not just the economical issues they recogniose; what draws attention is a large numer of environmental phenomena (nature, agriculture). Withering of plants and trees, drying up rivers and other water reservoirs / wetlands got mentioned really freaguently (about 80% each).

Base: total N=503

Significant raise in food prices	8	9 It is women who are more likely to
Withering of plants	84	notice an increase of food prices and
Lowering of water levels in rivers, canals, streams	83	a reduction in food availability, a reduction of water levels in rivers,
High heating prices	82	canals, streams and the drying up of rivers, marshes and wetlands.
Drying up of rivers, marshes and wetlands	79	N=248
Food availability restrictions	79	20.24.45
Withering of trees	73	20-24 y.o Younger 20-year-olds were
Fires	67	significantly more likely to
Reduction of land for growing vegetables and fruit	65	mention lack of heating. N=214
High water prices	61	φψ
Reduction of land for agricultural crops	58	
Desertification and formation of areas devoid of vegetation	52	The group of 20-year-olds linked to agriculture was significantly more likely to mention the
Lack od heating	34	problem of trees withering away, the reduction
Lack of tap water	26	of land for farming, vegetables and fruit, the high price of water, the creation of deserts and
Lack of bottled water in shops	25	areas without vegetation, the lack of heating, tap water and bottled water in the shops.
No / I don't know	2	N=165

85

82 81 82

80 81

81 🔼

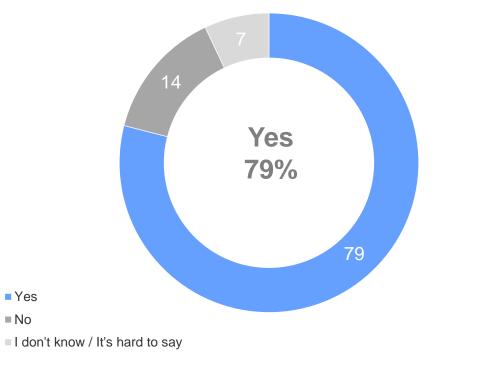
72 🔼

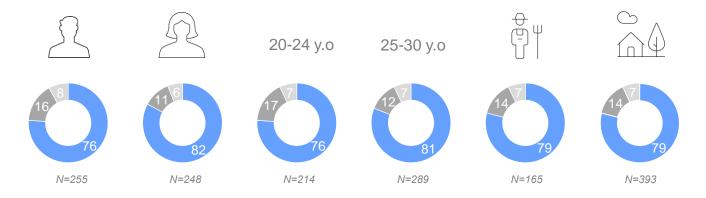
71 🔼

67

In the opinion of 20-year-olds, do Hungarian farmers experience water shortages?

The vast majority (as many as 79%) of young Hungarians are of the opinion that water shortages are felt by farmers in the country. The views are rather strong; it is noteworthy that there is a small percentage of those who do not have an opinion on this issue.





Opinions on water scarcity as perceived by Hungarian farmers.

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Yes No



How do the 20-year-olds think farmers would act in case of a drought?

Young Hungarians are nearly three times more inclined to think that in the event of a drought, farmers would prioritise irrigation and higher yields (65%) rather than coming to terms with the circumstances and stick to lower yields (22%).

A quarter of respondents say they do not know which type of agriculture is the most water efficient. Sustainable farming was indicated most often (39%), organic farmic second with 23%.

39 65 Sustainable agriculture Irrigation and better yields Organic farming 23 No irrigation and worse and lower yields Conventional agriculture Don't know / Difficult to I don't know / It's hard to say say

I think Hungarian farmers would choose to...

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R5. Which solution do you think the majority of farmers in our country would choose? R8. Which type of agriculture in your opinion uses water resources more sparingly?



Significance testing at 95% confidence level against previous quarter/wave Base: total N=503

The most water-efficient type of agriculture:

Do young Hungarians think there is room for a new offer for farmers to support them in the event of water shortages?

20-year-olds pointed distinctly more often to three of the proposed solutions: 36% chose water retention and storage, one in three - new plant varieties that need less water and nearly as many - drought-tolerant plant varieties.

Among the solutions that could be offered to farmers, more than a third of young Hungarians point at drought-resiliant crop varieties, new cultivation technologies and plant varieties that need less water.

Solutions that Hungarian farmers are believed to use to address drought:

37 Drought-resiliant crop varieties 36 Water retention and storage New cultivation technologies and irrigation 31 37 New plant varieties that need less water systems 29 Drought-tolerant plant varieties 33 Plant varieties that need less water 12 Digital products / support 26 Plants that produce an even higher yield Farmers don't do anything 11 Digital technologies monitoring the field for 26 sufficient crop irrigation 15 I have no opinion on this issue 19 I don't know

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R6. In your opinion, what solutions do farmers in Hungary use to help them deal with drought?R7. What solutions can agribusiness provide to support farmers in the response to drought?



Significance testing at 95% confidence level against previous quarter/wave Base: total N=503

Solutions that can assist farmers in response to drought:

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02

Caring for health and it's expressions. Reasons and ways to use mobile apps to support health and self-care.

How do young Hungarians take care of their health?

Young men in Hungary significantly more often take care for stress reduction, while young women provide themselves time in nature more frequently.

 \sim

	R	R
Providing time for relaxation, rest (reading books, listening to music etc.)	38	44
Ensuring sufficient sleep	38	35
Right work-life balance	31	31
Regular physical activity	31	28
Healthy nutrition, good eating habits	29	30
Stress reduction	34 🔷	25 💙
Providing time for oneself	29	30
Providing time in nature (walks, picnics, etc.).	24 🔽	35 🔷
Taking vitamins, supplements or other over-the-counter drugs with scientifically proven effects	26	32
Regular medical checkup	15	15
Seeking information on the Internet about how to prevent or treat various diseases	11	14
I use apps that help take care of my health	7	8
In some other way	I	0
I don't take care of my health at all	2	4
	N=255	N=248

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The best time to start taking care of one's health is...

More than half of young Hungarians believe that health should be taken care of from an early age. 17% thinks that it is always and in any situation. For some reason 14% indicated the age of 18 as the right moment.

From an early age	55
Having finished 18 years	14
Having finished 30 years	7
Having finished 40 years	4
Having finished 50 years	3
Having finished 60 years	3
At times when one should take special care of one's health, e.g. during seasonal viral infections, the height of the covid pandemic or during allergen outbursts	4
When one needs treatment	3
Every time, at all ages, in every situation	17



Z2. How do you take care of your health?

14

Self-care and caring for one's health: expressions.

Nearly half (47%) of 20-year-olds declare that healthy eating habits are important expressions of taking care of oneself, but only just under a third of respondents put this into practice. In contrast, more young Hungarians make time for rest and relaxation (41% vs 32%), take time just for themselves (29% vs 15%) and take vitamins or supplements (29% vs 17%) than declare. Apps and the Internet as a source of knowledge about preventive health care - not very popular.

47 41 Healthy nutrition, good eating habits Providing time for relaxation, rest Ensuring sufficient sleep 44 36 Ensuring sufficient sleep Regular physical activity 41 31 Right work-life balance Stress reduction 40 Regular physical activity 30 Daily basic hygiene 35 Healthy nutrition, good eating habits 29 Providing time for relaxation, rest 32 Stress reduction 29 Right work-life balance 29 Providing time for oneself 29 Providing time in nature (walks, picnics, etc.). 22 Providing time in nature (walks, picnics, etc.). 29 Regular medical checkup 18 Taking vitamins, supplements or other over-the-counter 29 Taking vitamins, supplements or other over-the-counter drugs drugs with scientifically proven effects 17 with scientifically proven effects 15 Regular medical checkup 15 Providing time for oneself Seeking information on the Internet about how to prevent or 12 Disconnecting from the internet \Social media 13 treat various diseases 7 I use apps that help take care of my health Having one's own little rituals 11 Body care and professional treatments Some other way 11 Seeking information on the Internet about how to prevent or 3 7 I don't take care of my health at all treat various diseases

Manifestations of self-care and health care:



Actions taken to foster health:

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How do 20-year-olds prefer to contact their doctor?

The preference for an in-person meeting with a doctor still prevails (65%), with the possible exception of a simple, repeated actions such as prescription or referral, in case of which young Hungarians are willing to accept some form of a remote appointment.

Women, although they also prefer a personal meeting, significantly more often declare that they accept f2f consultation only



18

17

Preferred type of medical consultation.

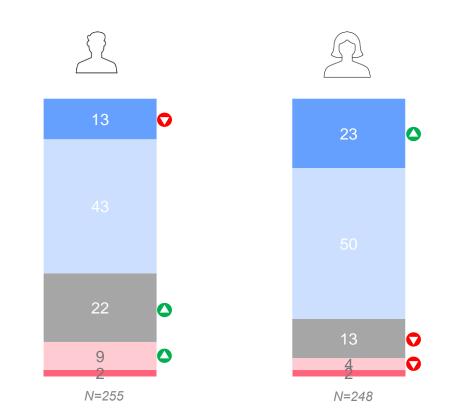
Only apersonal visit to the clinic and f2f contact with the doctor makes sense

 Face-to-face contact with the doctor is best, but in certain cases, such as prescriptions or referrals, remote advice can be used

I don't care whether I see my doctor online by phone or in person

I prefer to see my doctor online

I prefer a teleconsultation

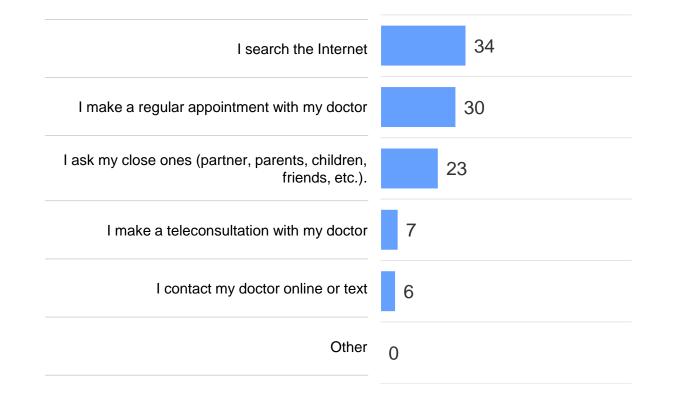


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I5. How would you rate how easy or difficult it is nowadays to get a medical advice / see a doctor when needed? A12. Nowadays, a lot of doctor's appointments and advice are either done online or as a teleconsultation. What is your opinion on this?



What do 20-year-olds do when they need advice or information about their health - now?



Young Hungarians most often (34%) search for information on the Internet first.

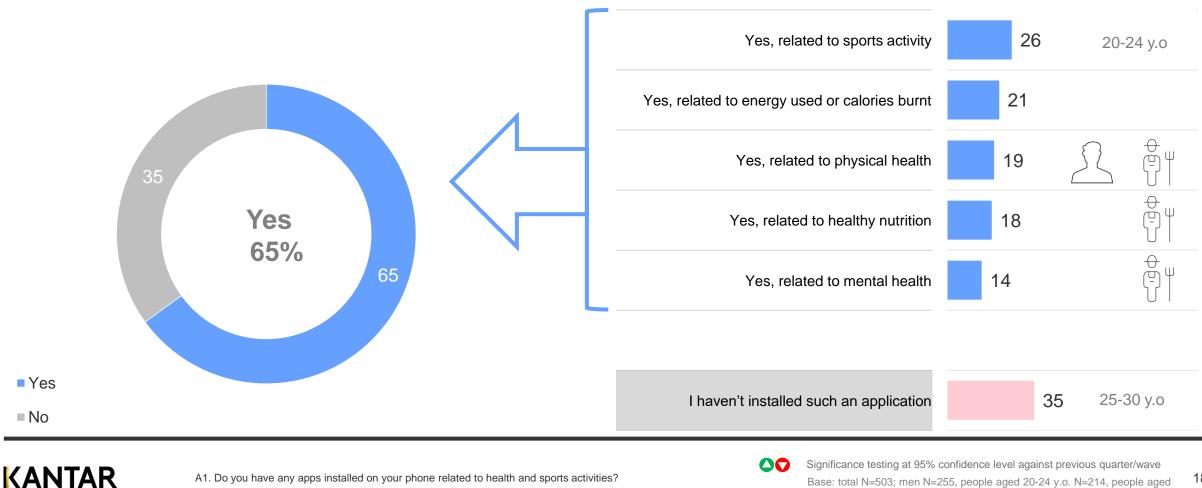
Nearly as much (30%) makes an appointment with a doctor. One in five (23%) turns to family.

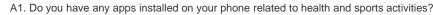




Do young Hungarians install apps to support themselves in taking care of their health?

Two-thirds of twenty-year-olds have installed some health, exercise, diet or calorie-related application on their phones. In the group of young Hungarians in some way linked to agriculture, a slightly higher share of people installed applications related specifically to phisical health (28%), healthy nutrition (25%) and mental helath (19%).





Yes

No

18 Base: total N=503; men N=255, people aged 20-24 y.o. N=214, people aged 25-30 y.o. N=289, linked to agriculture N=165

Have young Hungarians installed health apps on their phones? What were their reasons?

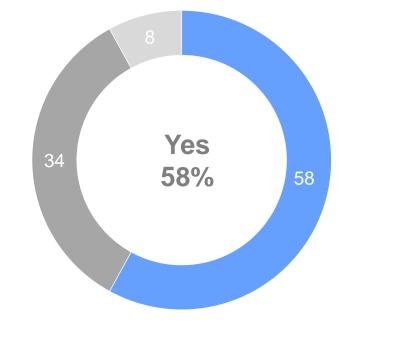
43% of 20-year-olds measure their number of steps using mobile apps. Nearly a third measure kilometres and calories burned (31% each). Pulse measurement, calories consumed and weight control follow, togetjher with a reminder to drink water. Mindfulness, mood and allergens - last.



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Do young Hungarians share the data collected by the app with the doctor during medical consultations?

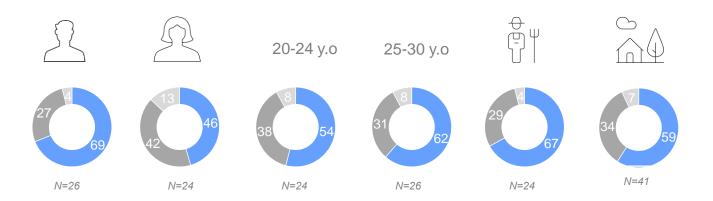


I don't know / It's hard to say

More than half of 20-year-olds present data collected by mobile apps related to health or sport to their doctor.

A third do not (34%) and only 8% have no opinion on the matter.

There were no significantly important differences among the groups.



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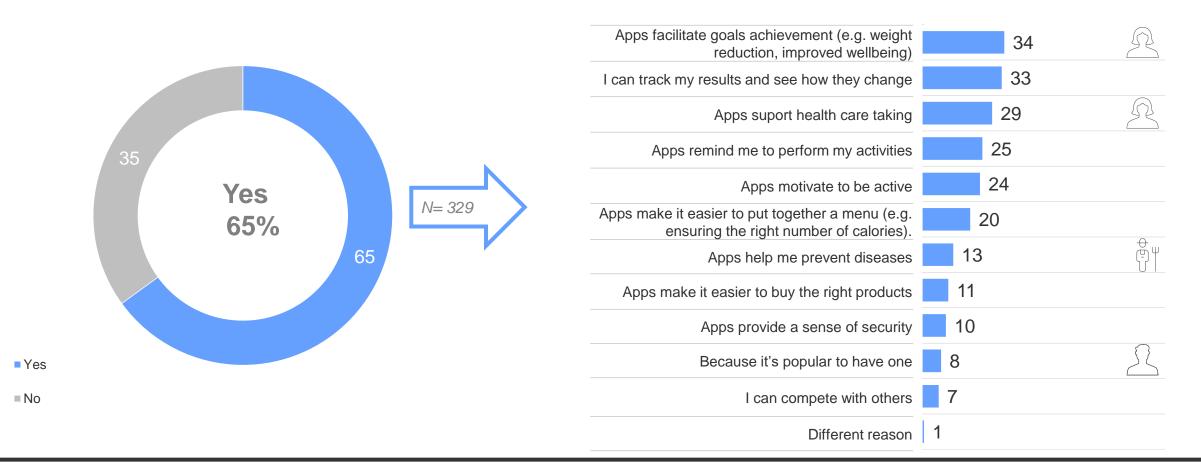
■ Yes ■ No

Significance testing at 95% confidence level against previous quarter/wave

Base - People with health monitoring apps, e.g. blood sugar, blood pressure or heart rate: N = 50

Why do 20-year-olds use apps to support taking care of their health?

The most popular reasons behind installing health-related apps are: the willingness to achieve goals related to health and sports (34%), performance tracking (33%) and general issues concerning taking care for health (29%). Every fourth person indicated reminders and motivational factors. Women install these apps more often because of the goal setting/ achievieng and general health-related reasons. Men more often mention the fab factor (11% vs 8%).



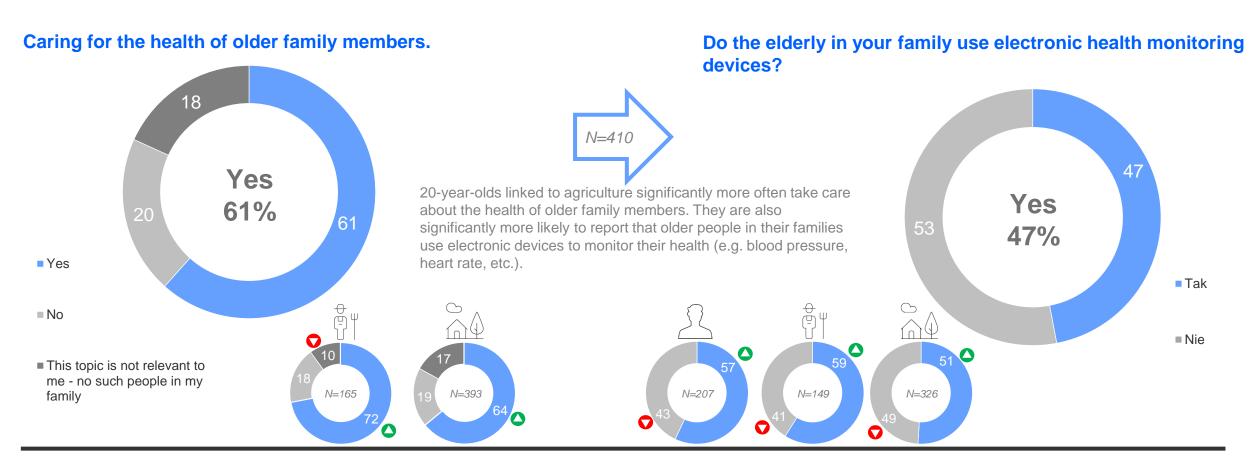
Significance testing at 95% confidence level against previous quarter/wave

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Base: app users N=329; women N=157, men N=172, linked to agriculture N=134

Do 20-year-olds care about the health of elderly family members? What do they know about the devices their charges use?

Nearly two thirds (61%) of 20-year-olds takes care of the health of older people in their family. Nearly half of them (47%) declares awareness that the older ones use either apps or medical measurment devices, monitoring blood pressure or alike parameters.



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A6. Do you look after health of older people within your family in any way? A7. To the best of your knowledge, do older people within your family use any electronic devices (e.g. apps, wristbands, watches, etc.) that monitor their health (e.g. heart rate, blood pressure) or support them in taking care of themselves?



Significance testing at 95% confidence level against previous quarter/wave Base: total N=503

Do health or sports apps for older people make sense?

58% of young Hungarians confirms. Over 40% of them justify this by the need to remind the elders of health-promoting behaviours. One third underlines preventive and motivational functions. One in four mentions security, health-related goals and menu planning.

Top2Box 58 Apps remind to perform an activity 44 (physical, take medication, drink) 40 Definitely yes Apps suport health caring 23 33 Apps prevent getting ill Rather yes 31 Apps motivate to perform physical activity 25 Apps support secure functioning N=292 I don't know/ It's hard to say Apps facilitate goal achievement (e.g. weight reduction, 25 improved wellbeing, etc.) 13 Apps facilitate menu planning (e.g. ensuring the right 24 number of calories, etc.). Rather not 22 Elderly can track their results 22 \bigcirc 13 Apps make it easier to buy the right products Definitely not Because it's popular 8 25-30 y.o 13 Bottom2box Elders can compete with others ÷ ¶ 8 Other reason 0

Are health and sports apps for elders?

Justification for the application:

A10. How do you think, do health and sports apps make sense for older people? A11. Why do you think health and \ or sports apps make sense for older people?

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23

Base: total N=503, A11. women N=137, people aged 25-30 y.o. N=161, with garden or allotment N=232, linked to agriculture N=110

Significance testing at 95% confidence level against previous guarter/wave

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