

KANTAR

The Barometer Bayer 2022

Warsaw, August /September 2022



Information about the study

Objectives

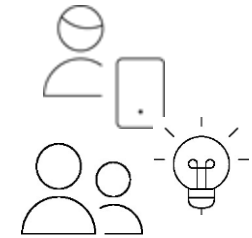
- ✓ To determine the level of knowledge related to water availability in Slovakia and worldwide. To identify attitudes toward the dangers concerning water shortages.
- ✓ To learn about opinions regarding taking care of oneself and one's health, and also about young people taking care for the elderly 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 Slovaks 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 SK N=500.

Methodology

- ✓ CAWI



Key insights

- ✓ **Young Slovaks recognize the problem of water shortages** (80% in Slovakia, 86% globally). Only 1/3 of them believe that water scarcity in Slovakia can become reality in the near future, half of them - that it may occur in the long run.
- ✓ **Responsibility for the threat of water shortages** is primarily placed by young Slovaks on... themselves and other members of society (60%, regarding water shortages in the country). They also relatively often attribute it to industry, large corporations and politicians (between 25% and 28% of respondents states so). Interestingly, ones pointed at as responsible are not seen as ones to mitigate the problem.
- ✓ Young Slovaks in general underestimate the water consumption levels in agriculture and industrial production.
- ✓ Almost all of them have personally encountered a significant increase in food prices (89%) and the high cost of heating (78%).
- ✓ 69% of 20-year-olds consider that **the current requirements for labelling** and use of registered plant protection products are safe for the environment, including water.
- ✓ **Among the solutions that could be offered to farmers**, 20-year-olds point to new cultivation technologies and irrigation systems, as well as plant species that perform well during shortages.
- ✓ There is an interesting discrepancy between what young Slovaks consider to be **a sign of taking care of their health and what they actually do to keep themselves in good condition**. Among the manifestations of taking care of themselves, the respondents most often mention healthy eating habits (42%) and stress reduction (38%), but fewer people implement it than actually declare (31% and 33%, respectively).
- ✓ **More than two-thirds (69%) of 20-year-olds have installed some health, exercise, diet or calorie-related application** in their phones; still among women they are significantly less popular.
- ✓ The most popular reasons behind installing health-related apps are performance tracking (37%) and motivation to be active (30%).
- ✓ **Nearly half of 20-year-olds care about the health of older people in their family**. Further half of them realise that the older ones use either apps or medical measurement devices, monitoring blood pressure or alike parameters. Knowledge of this subject is declared by 53% of the caring respondents.
- ✓ **Self-service pharmacies** seem to be the most believed-in medical services to gain popularity in the future. 41% of young Slovaks would be happy to use them when available, 1/3 even believes they might replace the traditional ones.

An underwater photograph showing the lower legs and feet of a person standing. The water is dark, and numerous small, bright droplets of water are suspended in the air around the person, creating a sparkling effect. The lighting is warm, highlighting the person's skin and the droplets.

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01

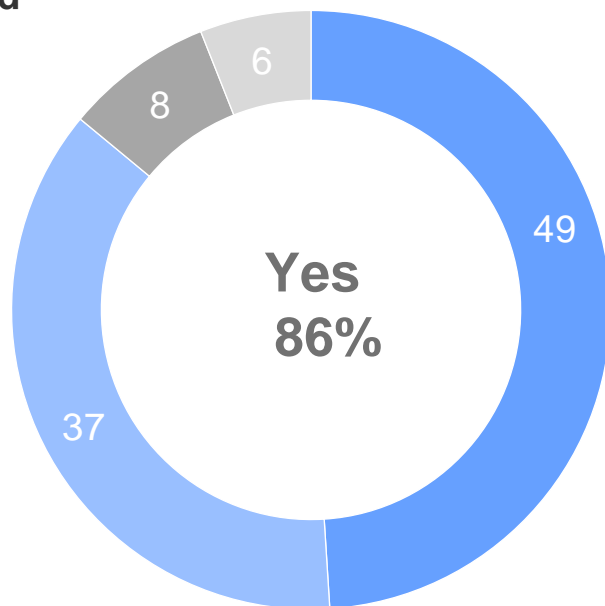
**Water resources in Slovakia and worldwide.
Attitudes towards the risks of water
scarcity**

Could there be a shortage of water?

Young Slovaks recognize the problem of water shortages (80% in Slovakia, 86% globally). Only 1/3 of them believe that water scarcity in Slovakia can become reality in the near future, half of them - that it may occur in the long run. When it comes to the world, the proportions are somewhat reversed.



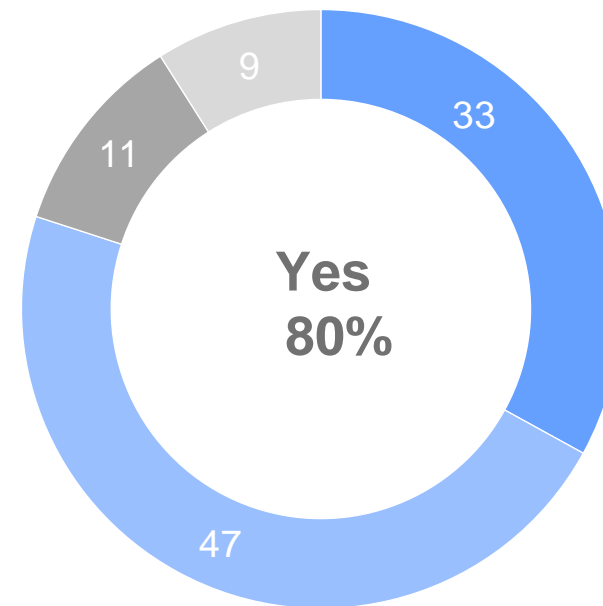
World



The threat of water shortages:

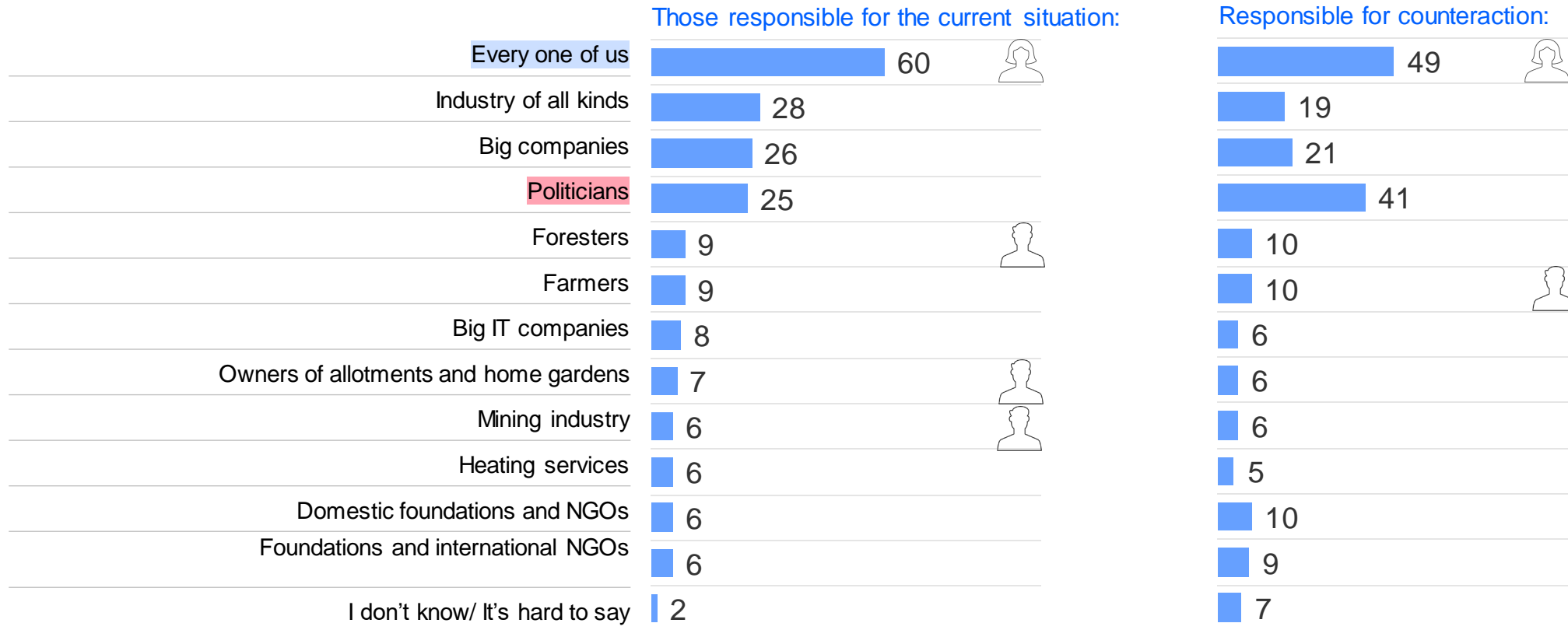
- Yes, in the near future
- Yes, but in the long run
- No
- Don't know / Hard to say

Slovakia



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

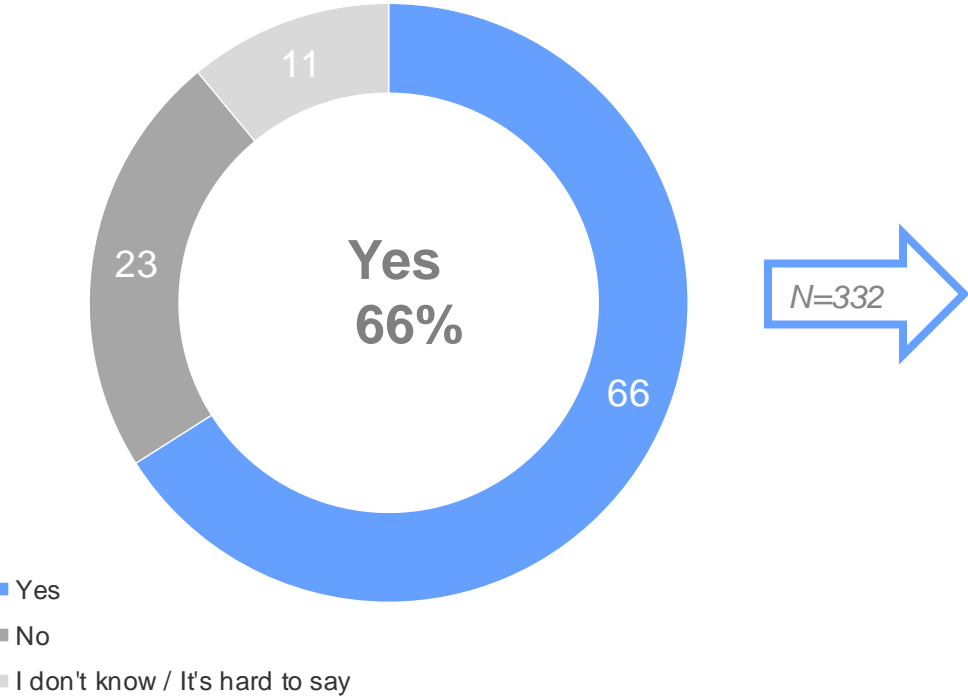
Responsibility for the threat of water shortages is primarily placed by young Slovaks on... themselves and other members of society (60%, regarding water shortages in Slovakia). They also relatively often attribute it to industry, large corporations and politicians (between 25% and 28% of respondents states so). Nearly half of them see the possibility of effective counteraction primarily in the responsible actions of the society (49%,) and in appropriate government policies (41%). Interestingly, ones pointed at as responsible are not seen as ones to mitigate the problem.



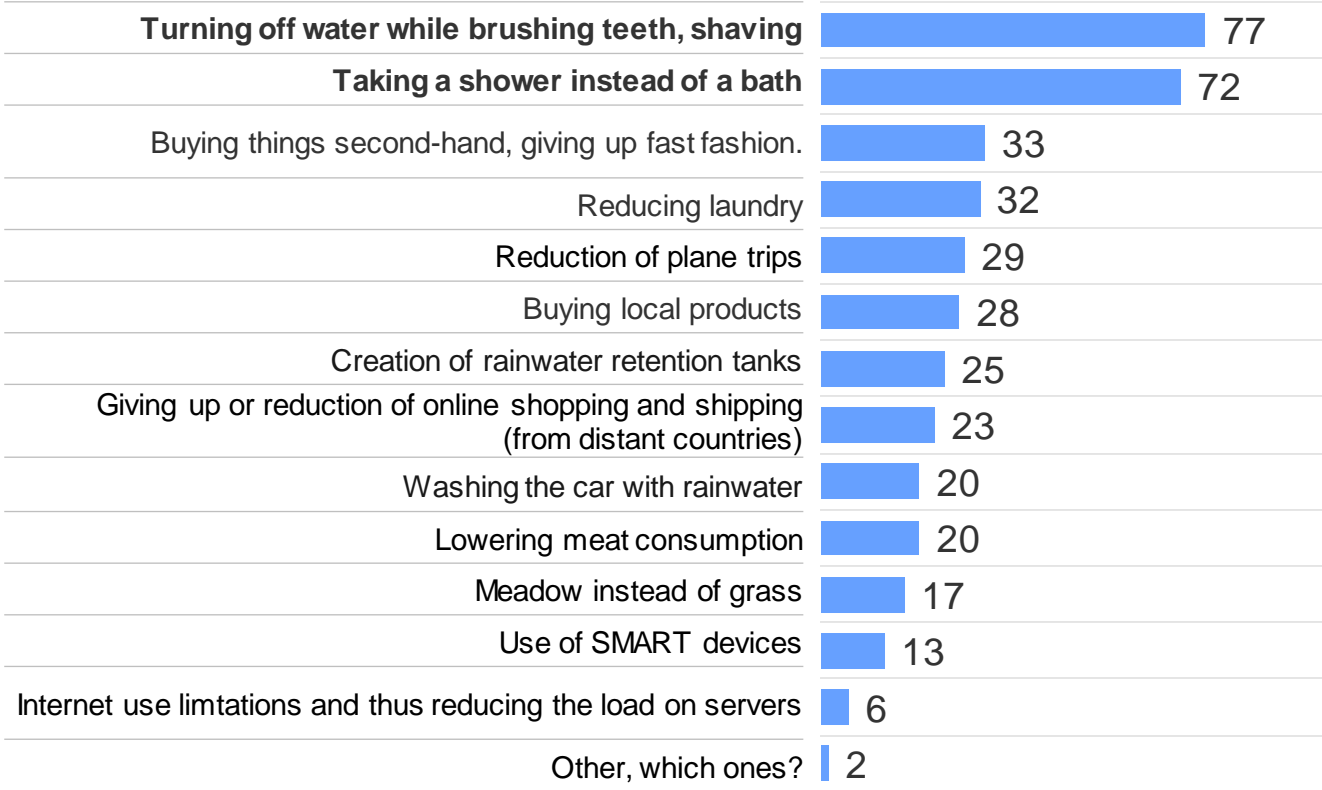
What activities do young Slovaks take to reduce water consumption?

Two-thirds of 20-year-olds say they take measures to reduce their water consumption. 70% and more do it in the bathroom when shaving, toothbrushing and taking shower. Nearly half are giving up buying fast fashion (second-hands are making a comeback). Although washing the car with rainwater is mentioned by ¾ of respondents, only one in five actually does it. The same split is seen with the creation of rainwater retention tanks, giving up fast fashion and reducing laundry.

Do you take activities to mitigate water crisis?



Types of activities taken:

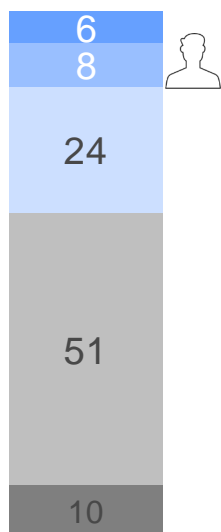


Should crop irrigation be forbidden in times of drought? And car washing?

Half of young Slovaks doesn't see much problem in farmers watering the fields during water shortages (51%). 38% is however to some extent convinced that's it's not right.

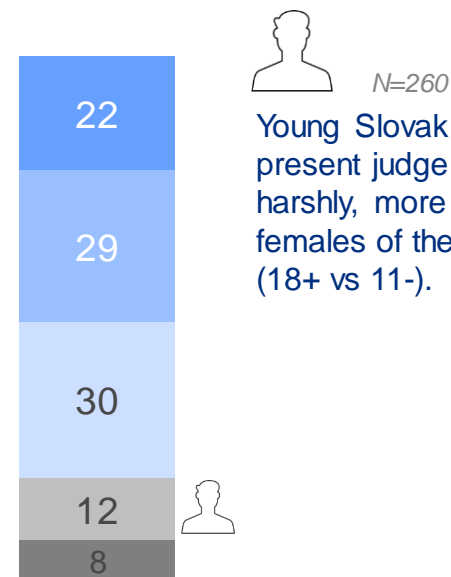
Opinions on washing the car when water is scarce are sharper; nearly 81% of 20-year-olds condemn this in some way.

Irrigating plants during drought.



- It should be banned
- It is embarrassing and shameful
- It's not right, but it's not particularly important
- It's normal, I don't see the problem
- I don't know.

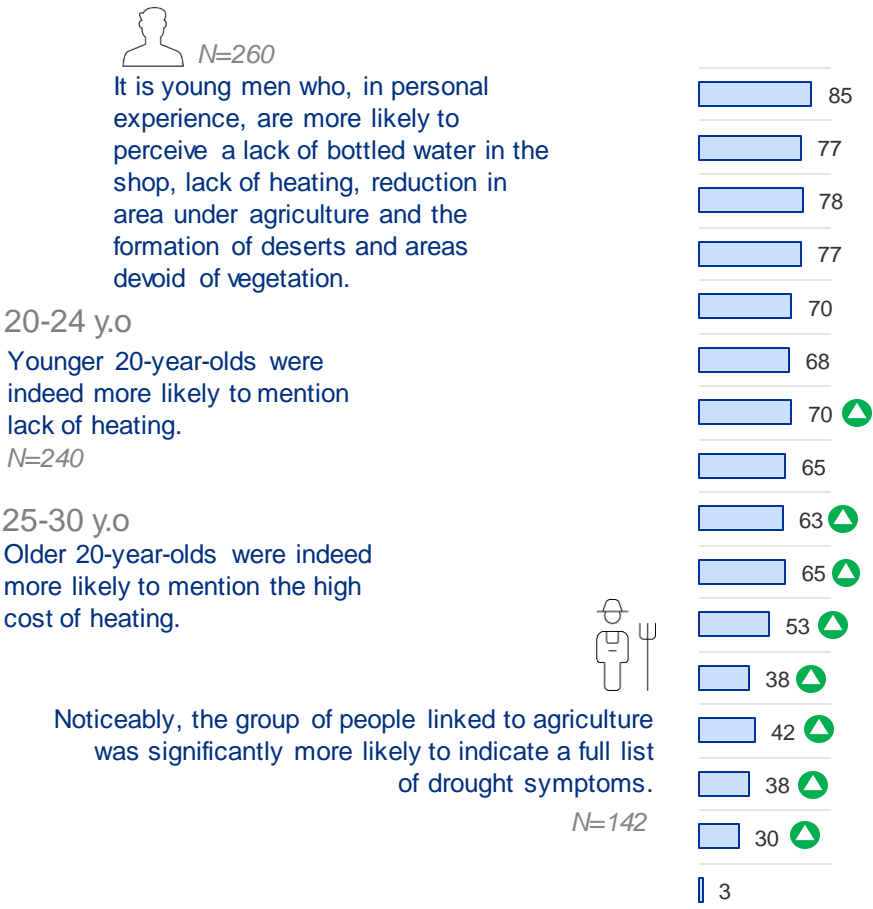
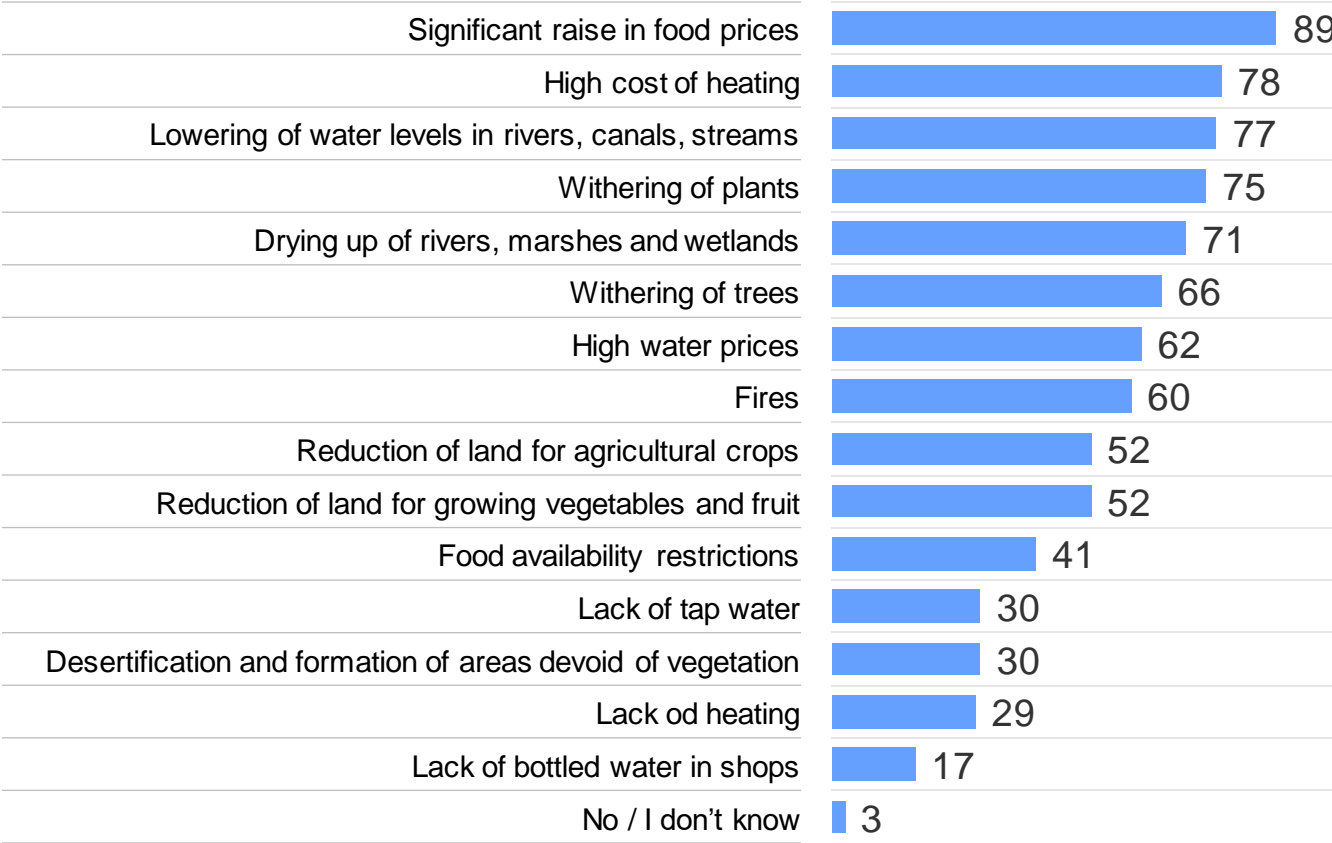
Washing the car during drought.



Young Slovak males present judge this most harshly, more harshly than females of the same age (18+ vs 11-).

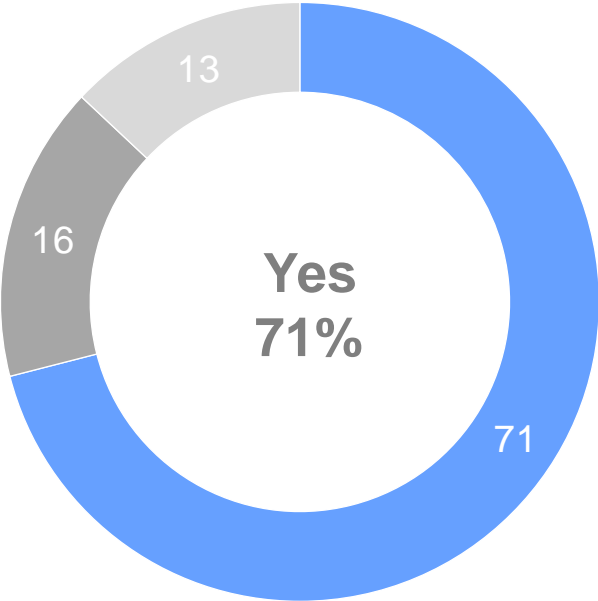
What symptoms of water scarcity have Slovak 20-year-olds experienced themselves?

Symptoms related to the cost of living are among those commonly mentioned - almost all young Slovaks have personally encountered a significant increase in food prices (89%) and the high cost of heating (78%). Another frequently mentioned signs are the physical symptoms of drought, to be observed in nature (decrease in water levels, drying out, fires - between 60% and 78%). Thirdly, the decreasing area under cultivation and deteriorating access to food is mentioned (41% - 52%). The lack of bottled water in shops closes the list.



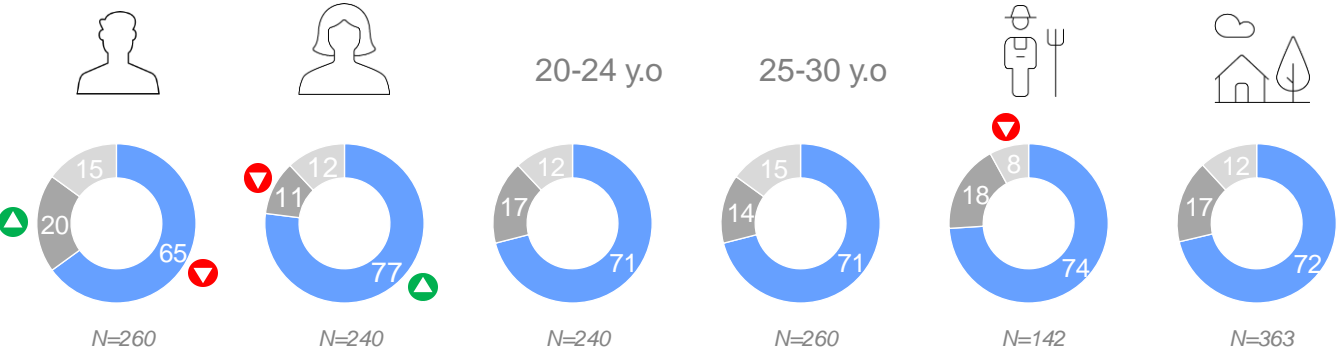
In the opinion of 20-year-olds, do Slovak farmers experience water shortages?

Opinions on water scarcity as perceived by Slovak farmers.



- Yes
- No
- I don't know / It's hard to say

As many as 71% of young Slovaks are of the opinion that water shortages are indeed experienced by farmers in the country. Among those convinced, it is women who indicate this significantly more often, and the most often of all the groups surveyed. Men, on the other hand, most often declare that farmers do not face water scarcity at all.

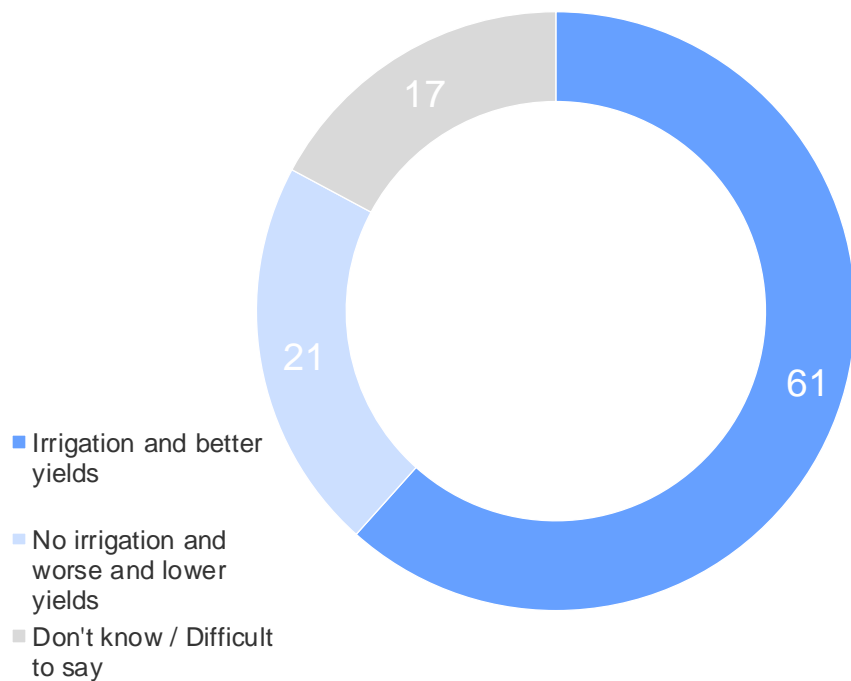


How do the 20-year-olds think farmers would act in case of a drought?

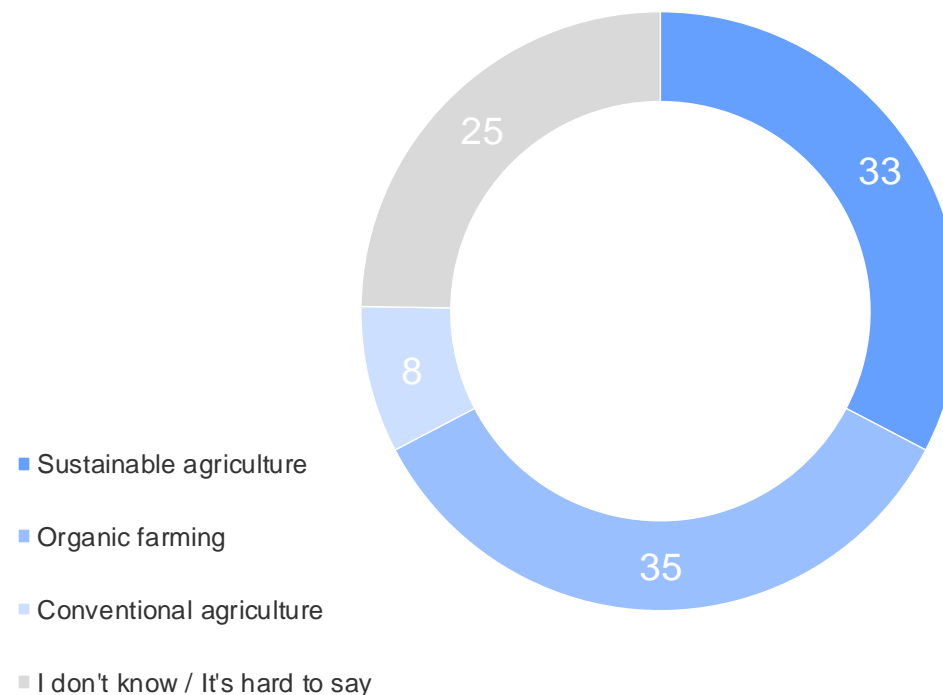
Young Slovaks are nearly three times more inclined to think that in the event of a drought, farmers would prioritise irrigation and higher yields (61%) rather than coming to terms with the circumstances and stick to lower yields (21%).

A quarter of respondents say they do not know which type of agriculture is the most water efficient. One in three pointed to organic farming (35%), to be followed closely by sustainable farming (33%).

I think Slovak farmers would choose to...



The most water-efficient type of agriculture:

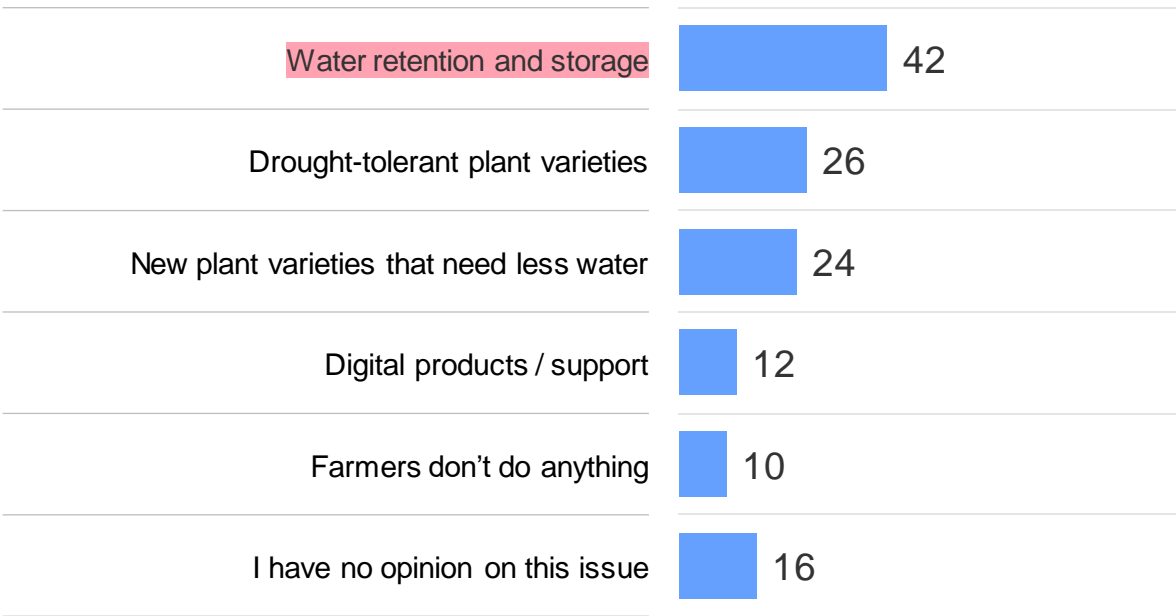


Do young Slovaks think there is room for a new offer for farmers to support them in the event of water shortages?

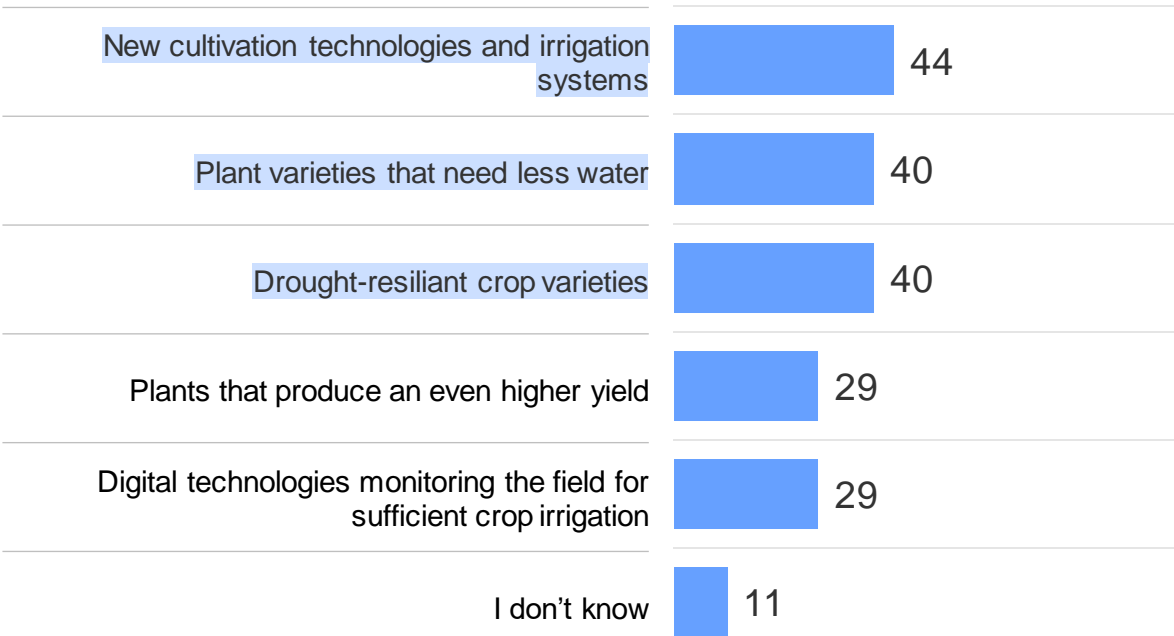
42% of respondents believe that farmers are now opting for solutions focused on water retention and storage. One in four of the 20-year-olds think that farmers are using new crop varieties that are drought-resistant in some way.

Among the solutions that could be offered to farmers, 20-year-olds point to new cultivation technologies and irrigation systems, as well as plant species that perform well during shortages.

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



Solutions that can assist farmers in response to drought:



A person is running on a rocky trail during sunset. The runner is wearing dark shorts and running shoes, with one foot lifted in mid-stride. The background shows a hazy landscape with mountains under a warm, orange sky. The sun is low on the horizon, creating a strong backlight effect.

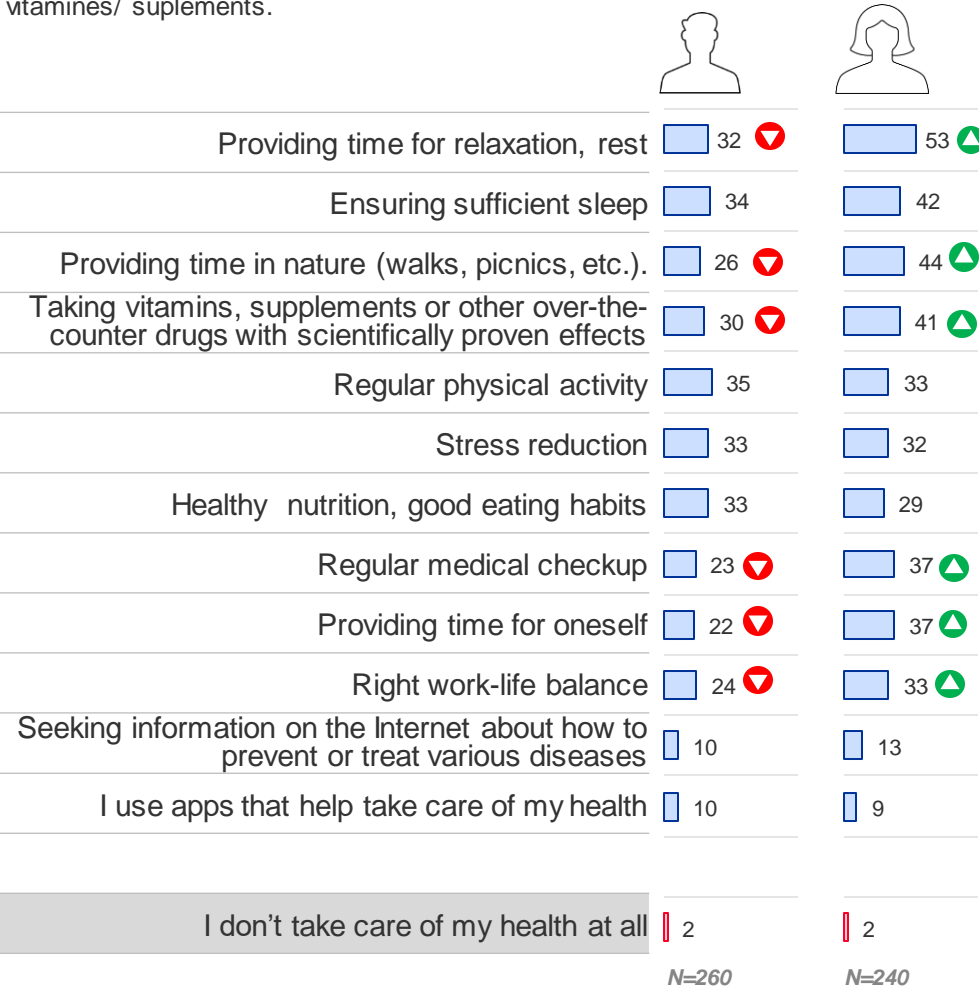
KANTAR

02

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

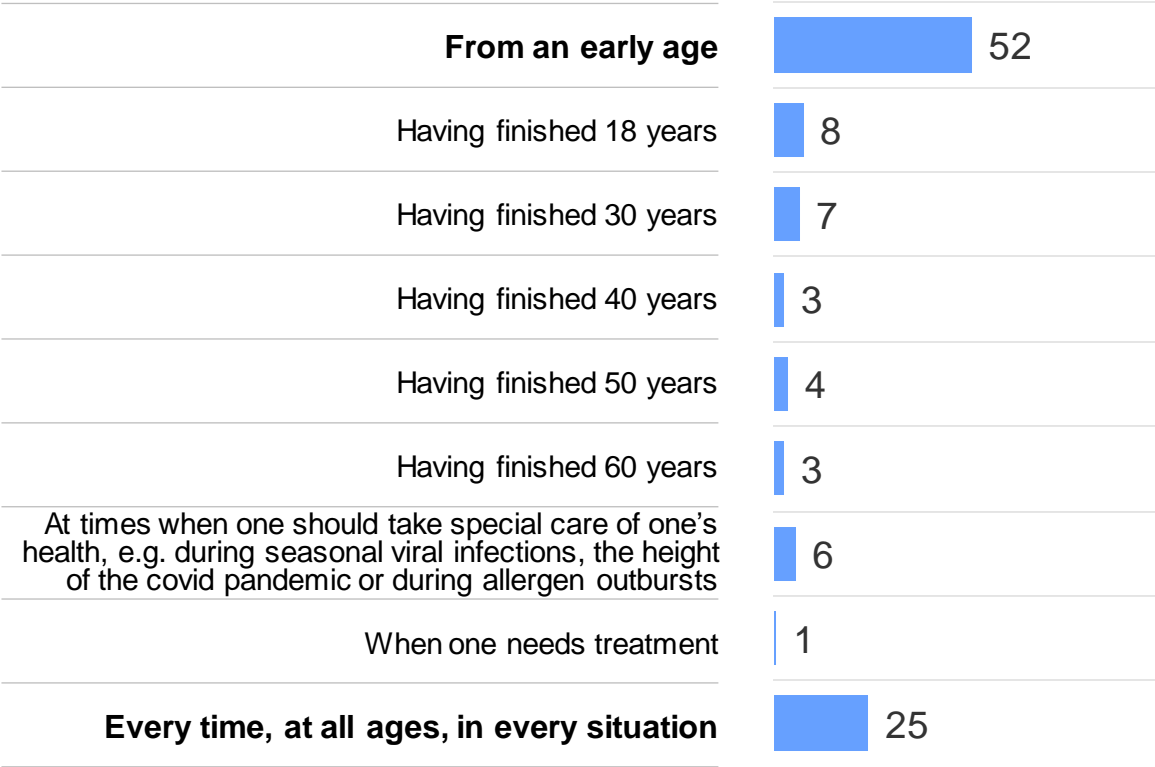
How do young Slovaks take care of their health?

In actual taking care of themselves, young women are overtaking the declarations of the general population in their twenties; they care about relaxation, contact with nature and take vitamins/ supplements.



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

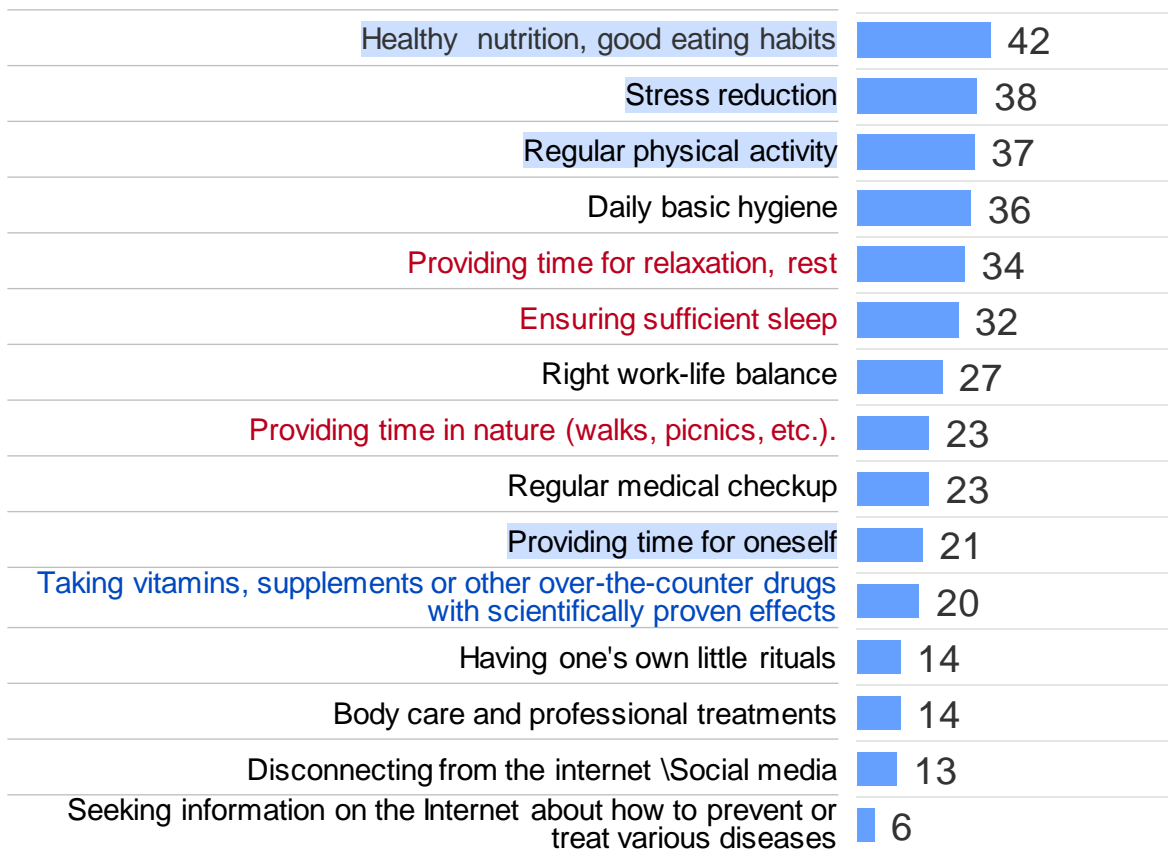
More than half of young Slovaks believe that health should be taken care of from an early age. Every fourth thinks that it is always and in any situation. 1/3 of the respondents provide various, scattered age values.



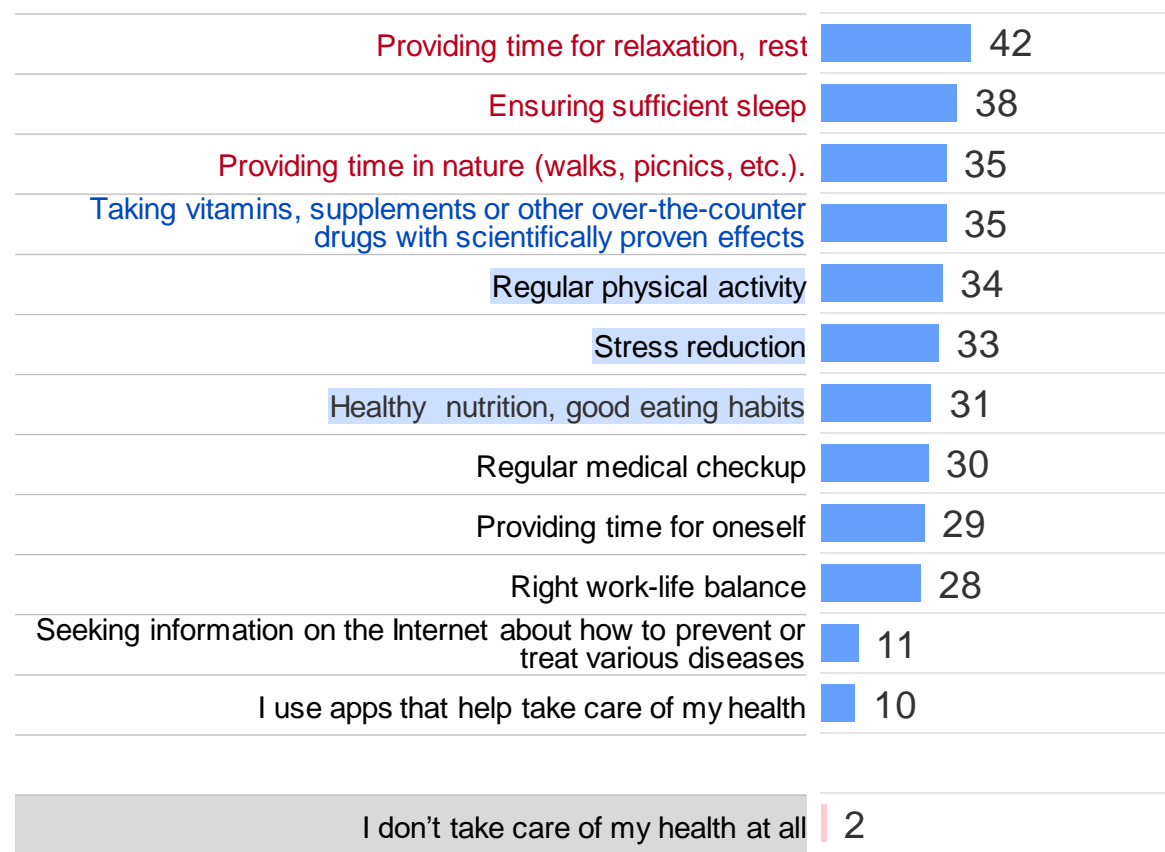
Self-care and caring for one's health: expressions.

There is an interesting discrepancy between what young Slovaks consider to be a sign of taking care of their health and what they actually do in keep themselves in good health and shape. Among the manifestations of taking care of themselves, the respondents most often mention healthy eating habits and stress reduction, but fewer people implement it than actually declare. Apps and Internet as a source of knowledge on preventive health - not very popular.

Manifestations of self-care and health care:



Actions taken to foster health:



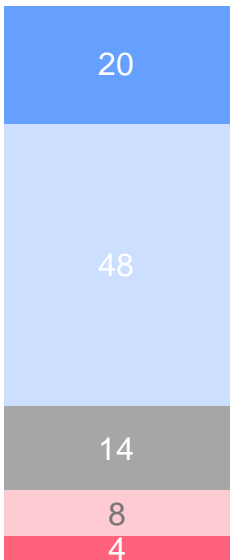
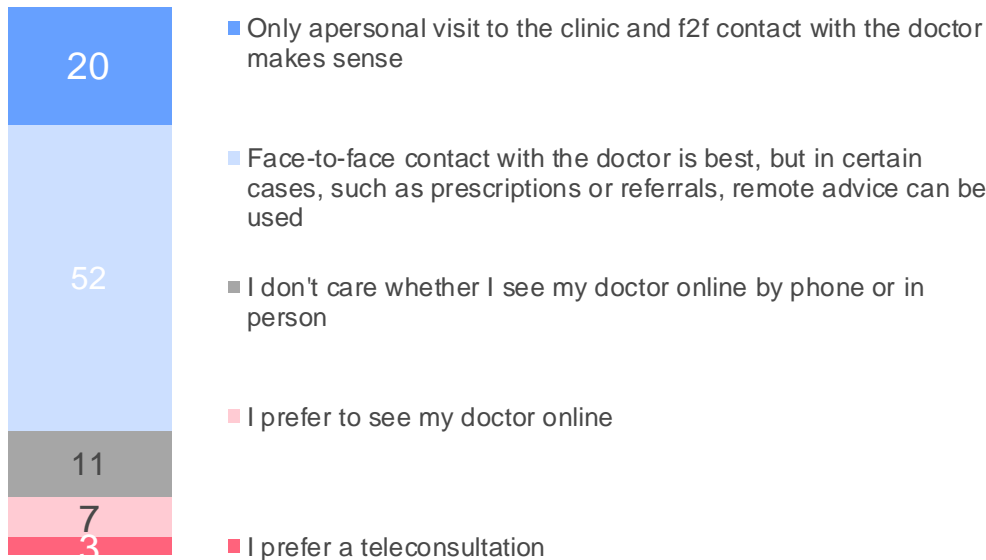
How do 20-year-olds prefer to contact their doctor?

The preference for an in-person meeting with a doctor still prevails, with the possible exception of a simple , repeated prescription.

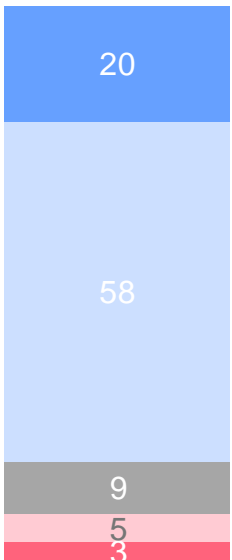
Women, although they also prefer a personal meeting, significantly more often declare that they accept remote meeting in the case of prescriptions or referrals.



Preferred type of medical consultation.



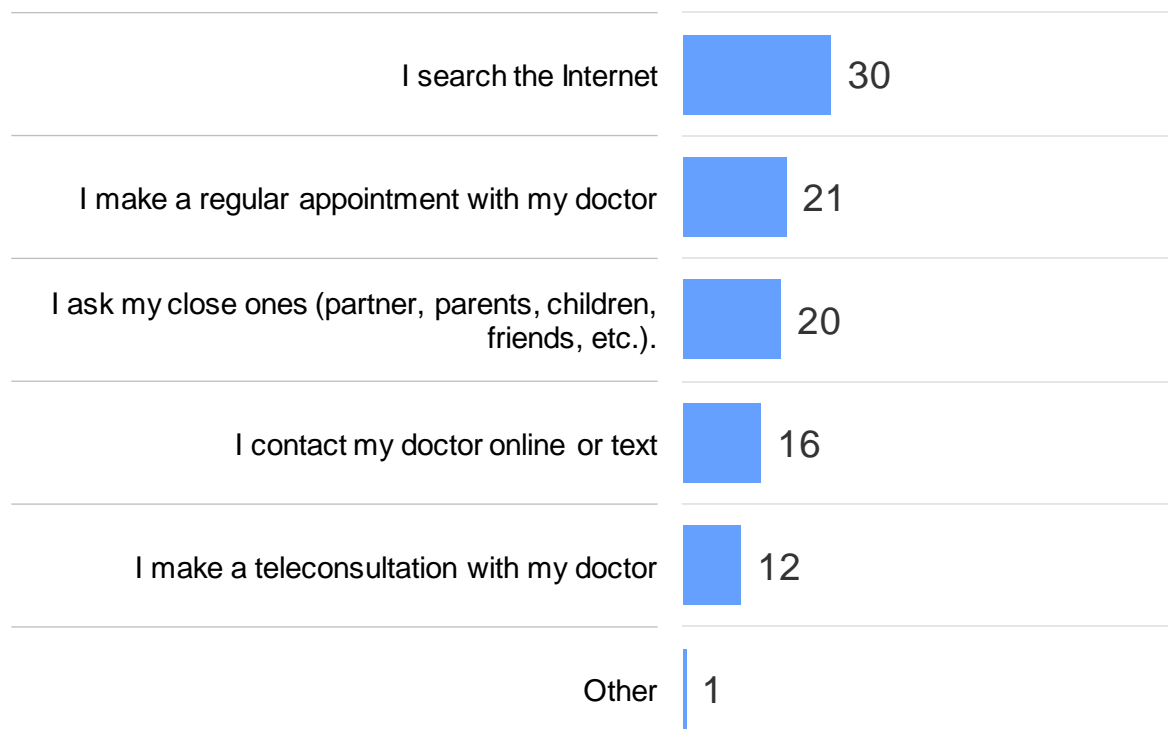
N=260



N=240



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



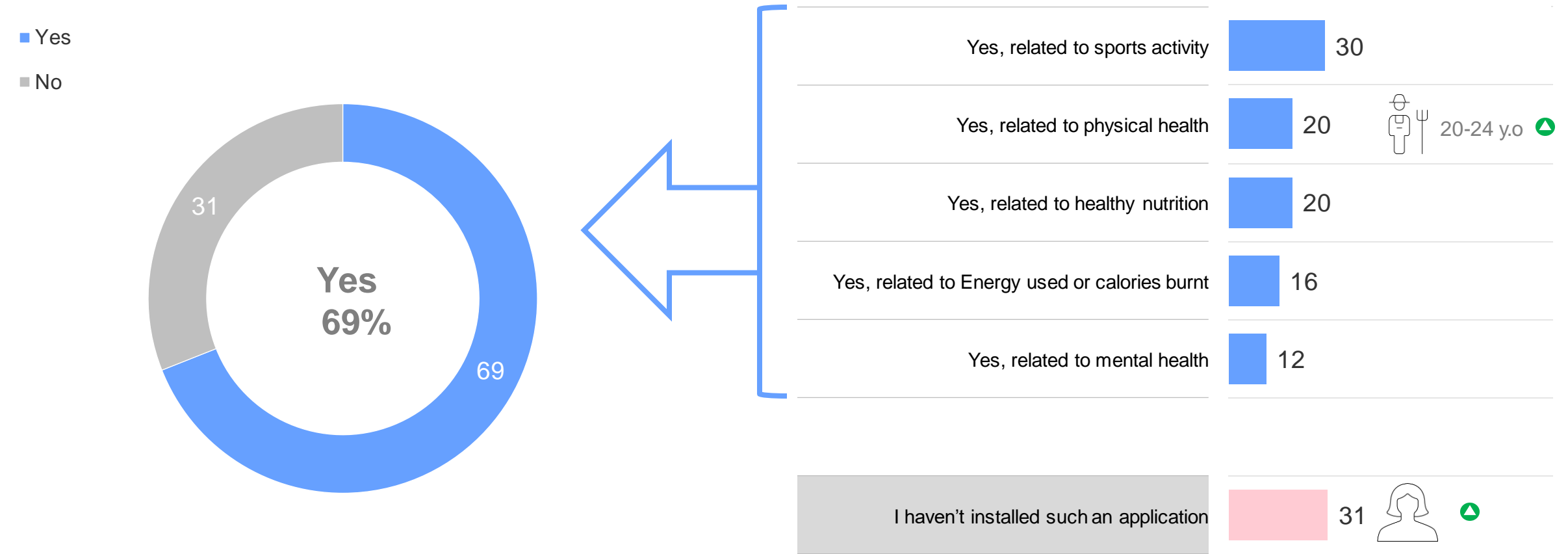
Young Slovaks most often (30%) search for information on the Internet first.

Nearly half of them (49%) make an appointment with a doctor, in either form (traditional form of in person appointment is chosen by every fifth of them).

One in five turns to family.

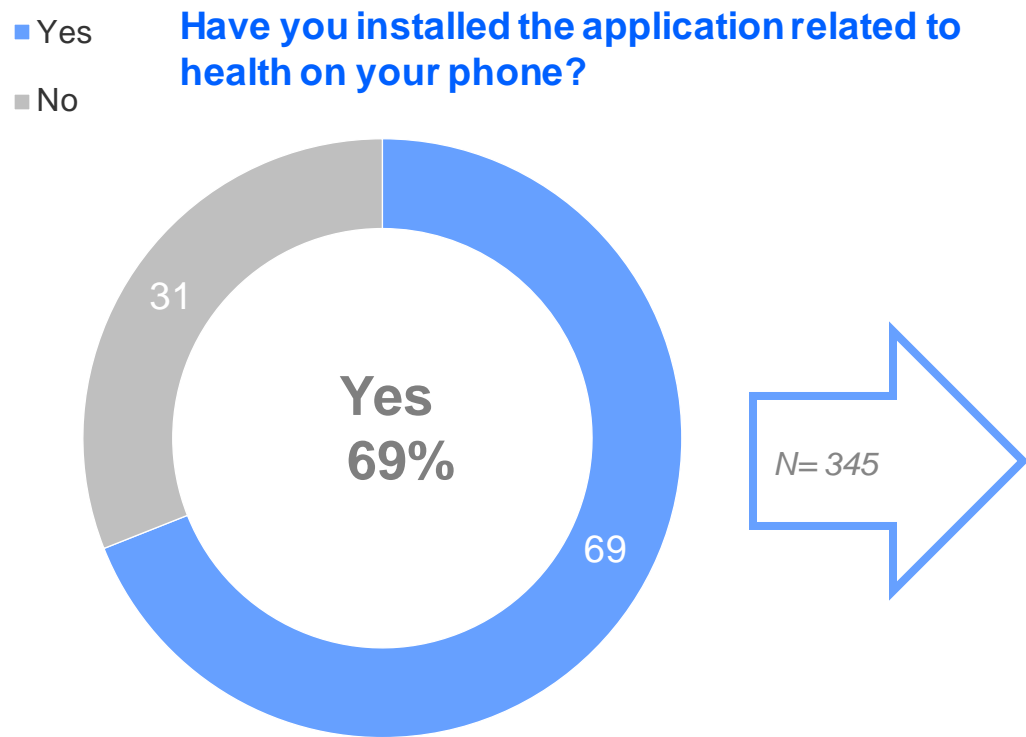
Do young Slovaks install apps to support themselves in taking care of their health?

More than two-thirds of twenty-year-olds have installed some health, exercise, diet or calorie-related application on their phones; still among women they are significantly less popular. In the group of young Slovaks in some way linked to agriculture, a slightly higher share of people installed applications related specifically to sports activity (30%).

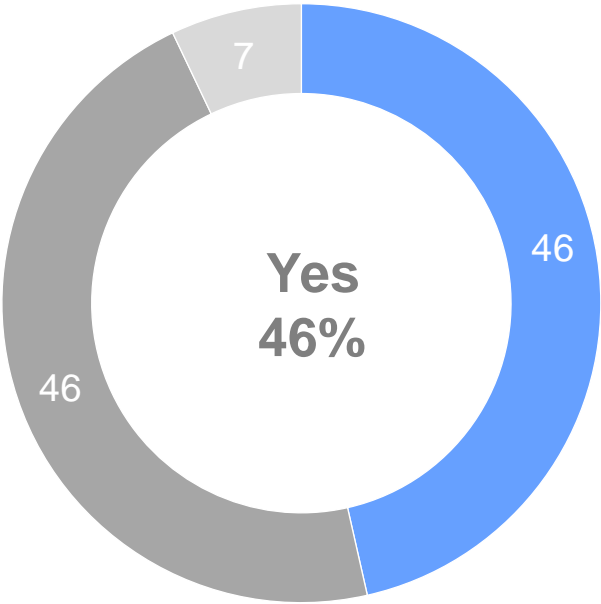


Have young Slovaks installed health apps on their phones? What were their reasons?

Nearly half of young Slovaks measure the number of steps using mobile apps. About 40% of them indicates, that they use the app to measure steps. 1/3rd measures kilometers. Pulse measurement, sleep quality and sport exercise programmes follow. Measurements control, pollution and allergenes check are the least popular.



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

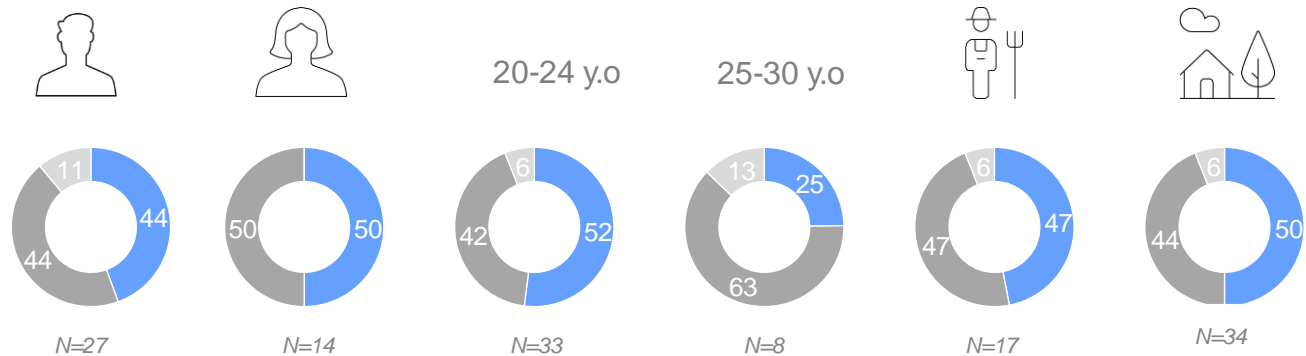


- Yes
- No
- I don't know / It's hard to say

Nearly half of those surveyed (46%) present data collected by mobile apps related to health or sport to their doctor.

The other half doesn't do it (46%).

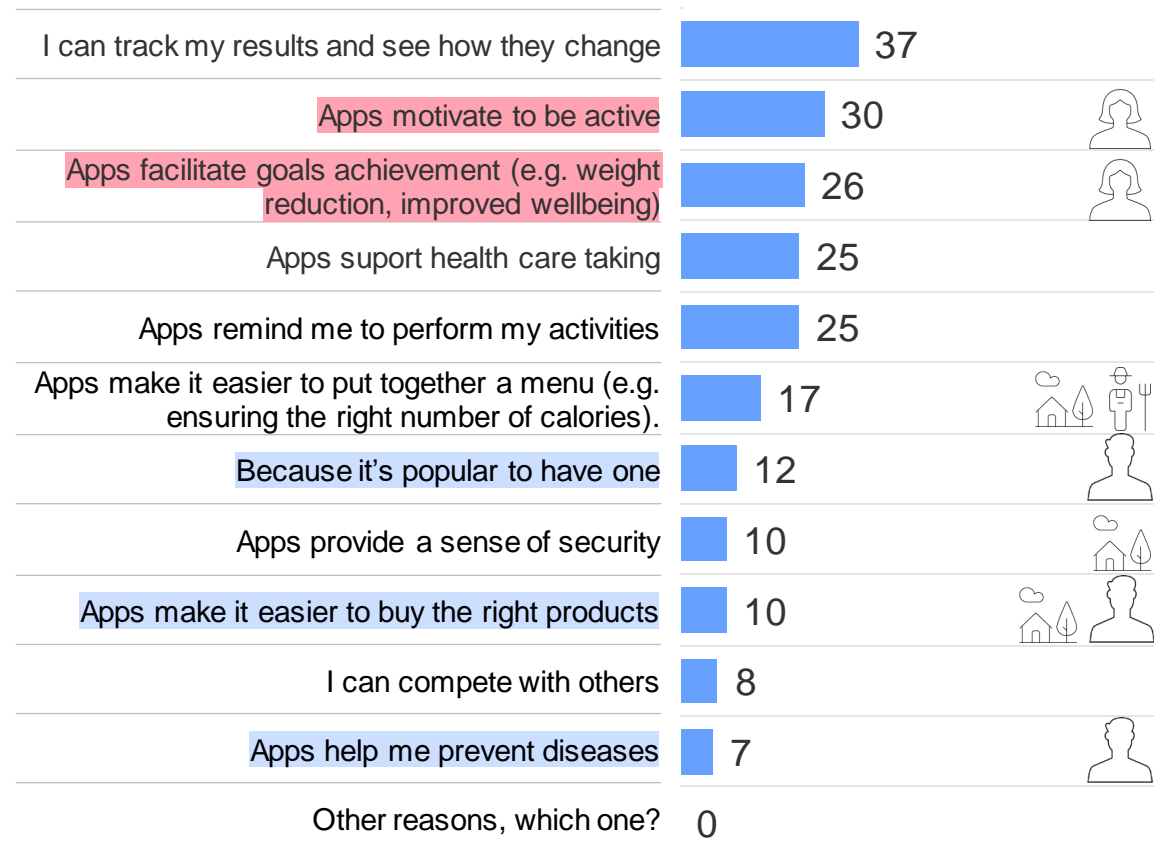
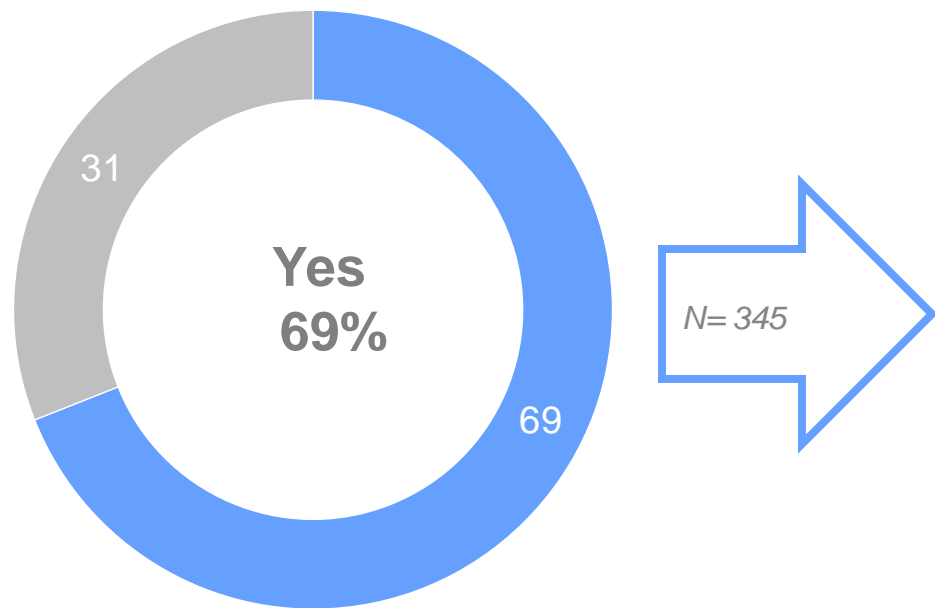
Among those who do, older 20-year-olds are much less likely to show their doctor app data.



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

The most popular reasons behind installing health-related apps are performance tracking and motivation to be active. Every fourth person indicated achieving goals, generally understood as caring for health and reminding function. Women install these apps more often because of the motivational support and goal they set for themselves (e.g. weight loss or indicators of well-being).

■ Yes ■ No

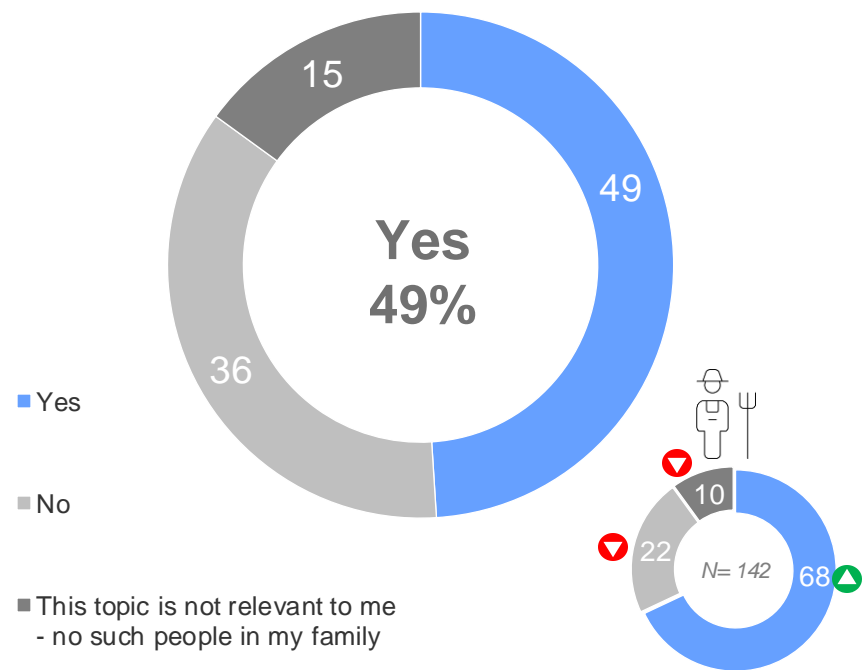


Do 20-year-olds care about the health of elderly family members?

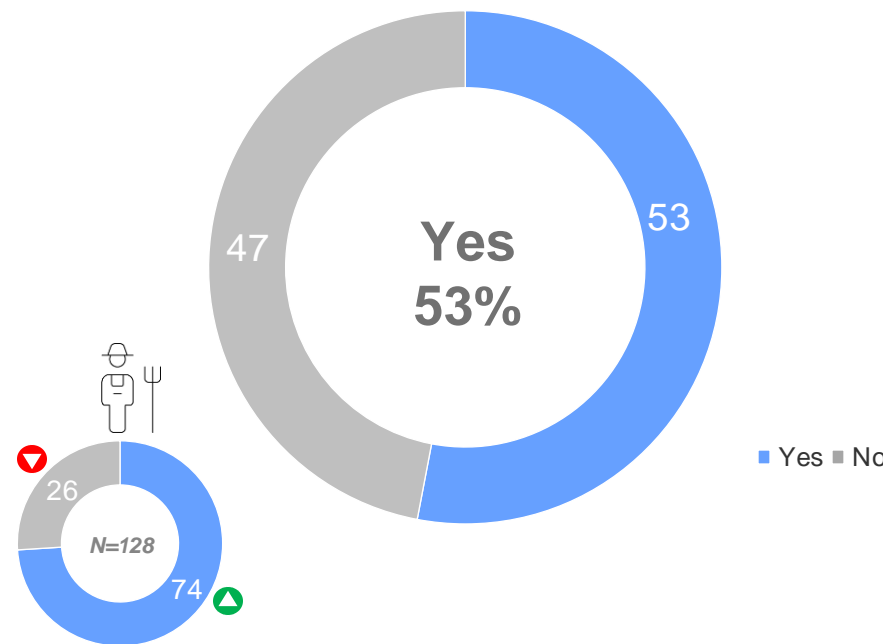
What do they know about the devices their charges use?

Nearly half of 20-year-olds care about the health of older people in their family. Further half of them (53%) realise that the older ones use either apps or medical measurement devices, monitoring blood pressure or alike parameters.

Caring for the health of older family members.



Do the elderly in your family use electronic health monitoring devices?

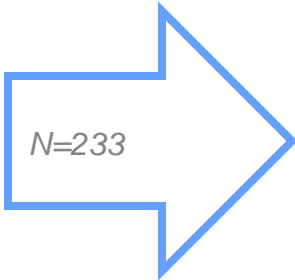
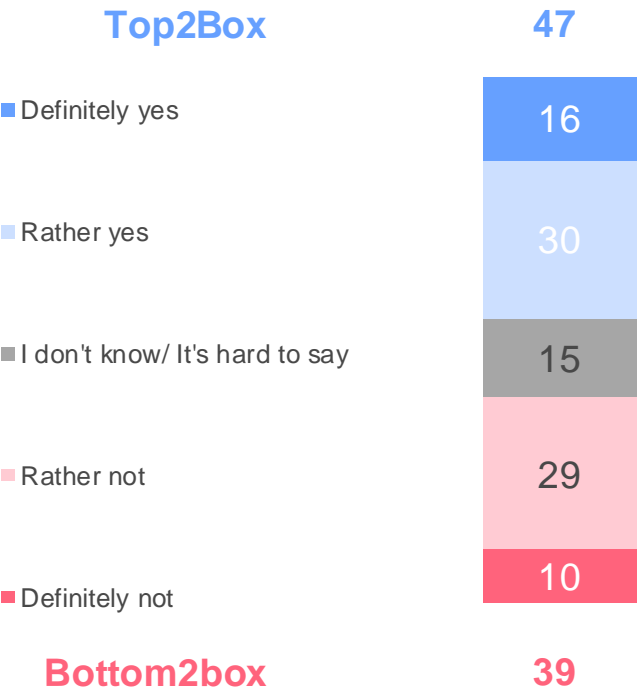


Those in their twenties linked to agriculture are significantly more likely to care about the health of older family members. They are also significantly more likely to report that older people in their families use electronic devices to monitor their health (e.g. blood pressure, heart rate, etc.).

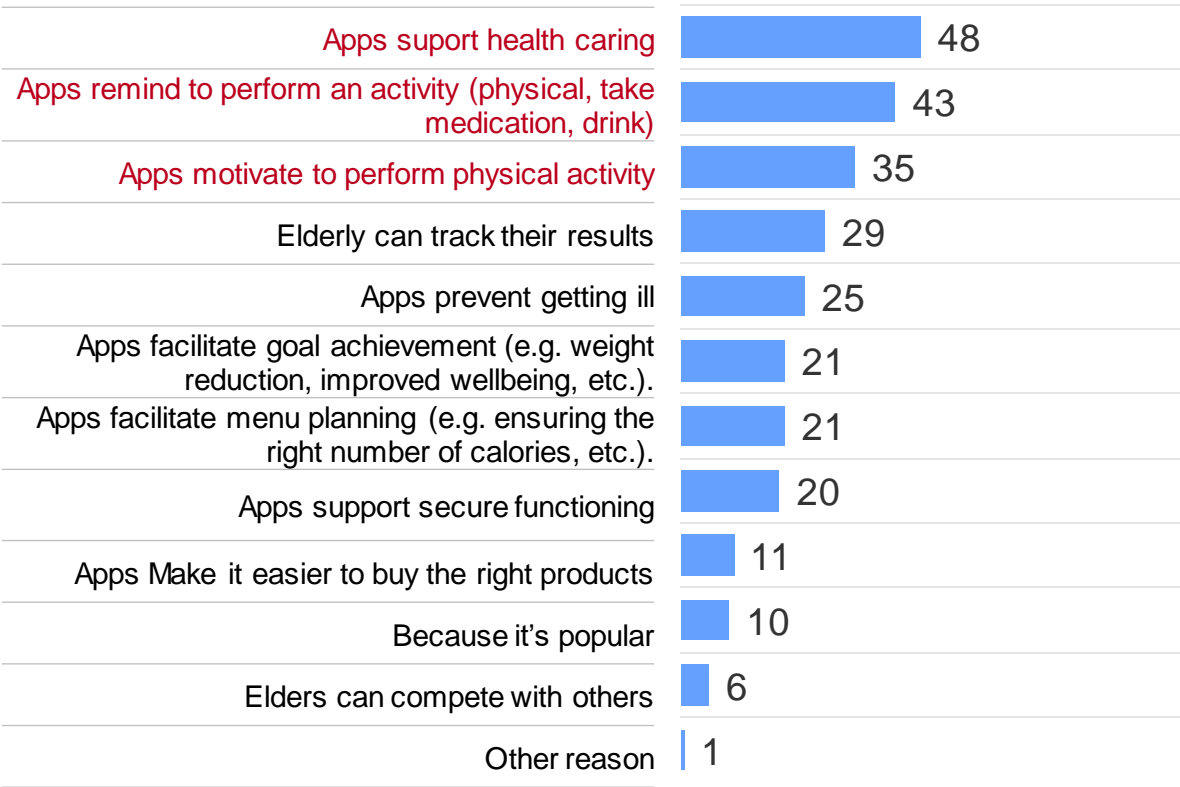
Do health or sports apps for older people make sense?

Nearly half of the respondents indicate that apps for older people do make sense. They justify this by the need to remind them of health-promoting behaviours and motivate older people to be physically active. For a third of 20-year-olds, it is important to track changes in performance.

Are health and sports apps for elders?



Justification for the application:



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