

KANTAR

Barometr Bayer 2022

Warsaw, August /September 2022



Information about the study

Objectives

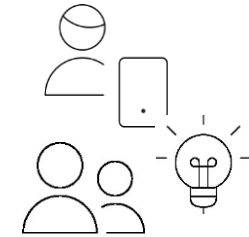
- ✓ To determine the level of knowledge related to water availability in Czech Republic and worldwide. To identify attitudes toward the dangers concerning water shortages.
- ✓ To learn about opinions regarding taking care of oneself and one's health, and also about young people taking care for the elderly 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 Czechs 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 CZ N=499.

Methodology

- ✓ CAWI



Key insights

- ✓ **Young Czechs recognize the issue of water shortages**, but regard it rather to be a global problem, than a domestic one (87% worldwide, 66% in Czech Republic). It's interesting to observe how sure they are when expressing their opinion on the global scale, while only one in five believes that water scarcity in Czech Republic can become reality in the near future.
- ✓ **The responsibility for the dangers related to water shortages** is mainly attributed to everyone (59%). An interesting pattern emerges: those at fault of water scarcity are not adequately seen as responsible for counteracting (with the exception of politicians and international foundations).
- ✓ Over one third of young Czechs admits they don't know how much water is needed for server maintenance (37%) or mining of a tonne of coal (34%) . When giving answers, in general they underestimate water consumption levels.
- ✓ **The most popular allocation of funds for solutions supporting farmers with water shortage problems** would be water retention systems, even if this would result in diminishment of acres under cultivation.
- ✓ Among the **solutions that could be offered to farmers**, 20-year-olds point with equal frequency to plant species that perform well in times of scarcity to new cultivation technologies and irrigation systems. Digital technologies to monitor field moisture also indicated by one in three young Czechs (32%).
- ✓ Among Czech twenty-year-olds there is a **clear preference to meet a doctor in person (69%)**. Interestingly, young Czechs are at the same time willing to accept remote advice for simple situations such as issuing a prescription or making a referral.
- ✓ A really small percentage of respondents explicitly accepts online appointments (4%) and teleconsultation (4%).
- ✓ **More than two-thirds (69%) of twenty-year-olds have installed apps** related to health, exercise, diet or calories count (on their phones). Women significantly more often install apps related to sports activity whilst men – to general physical health. It's interesting to notice the significantly higher penetration by apps related to mental health in the group of younger 20-year-olds in Czech Republic.
- ✓ Over half (53%) of the respondents indicate that **apps for older people make sense**.
- ✓ Exactly half of them presents the data collected by mobile apps to their doctor.
- ✓ According to twenty-year-olds, it's the prescription-related services that will gain popularity in the future (e-prescriptions 49% and codes, 46%).



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01

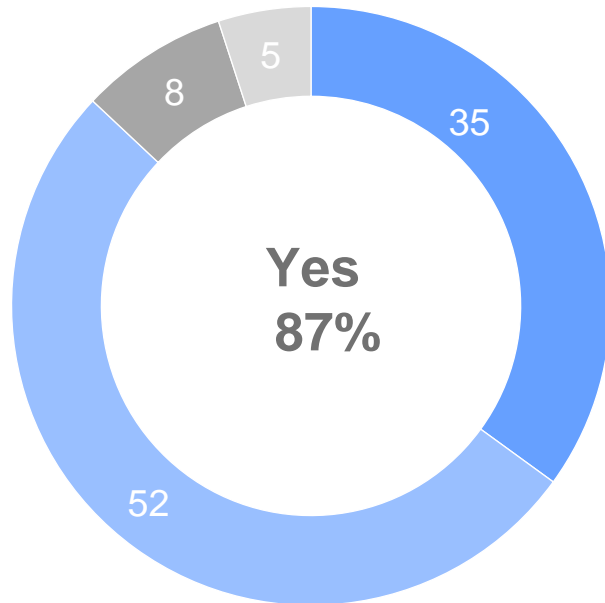
Water resources in Czech Republic and worldwide. Attitudes towards the risks of water scarcity.

Could there be a shortage of water?

Young Czechs recognize the problem of water shortages, but regard it rather as a global issue, than a domestic one (87% worldwide, 66% in Czech Republic). It's interesting to observe how sure they are when expressing their opinion on the global scale (13% in grey worldwide vs 34% domestic). Only one in five of them believes that water scarcity in Czech Republic can become reality in the near future, and nearly half of them thinks that it may occur in the long run. When it comes to the world, 20-years-olds more often declare water problems to happen soon (35% worldwide, 20% in the country).



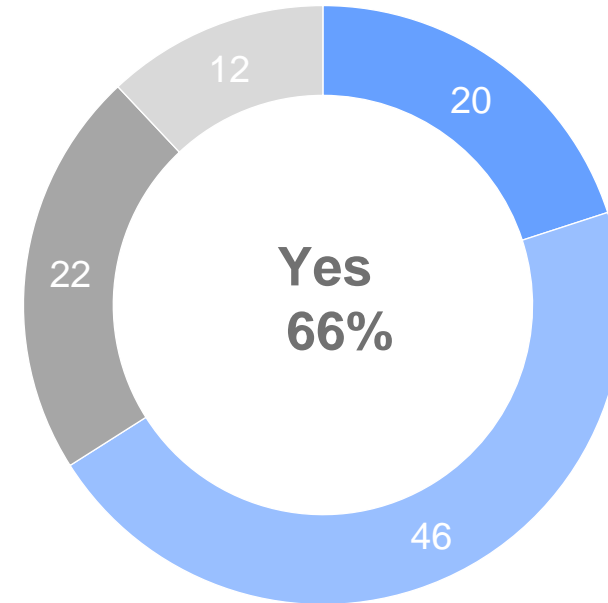
World



The threat of water shortages:

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

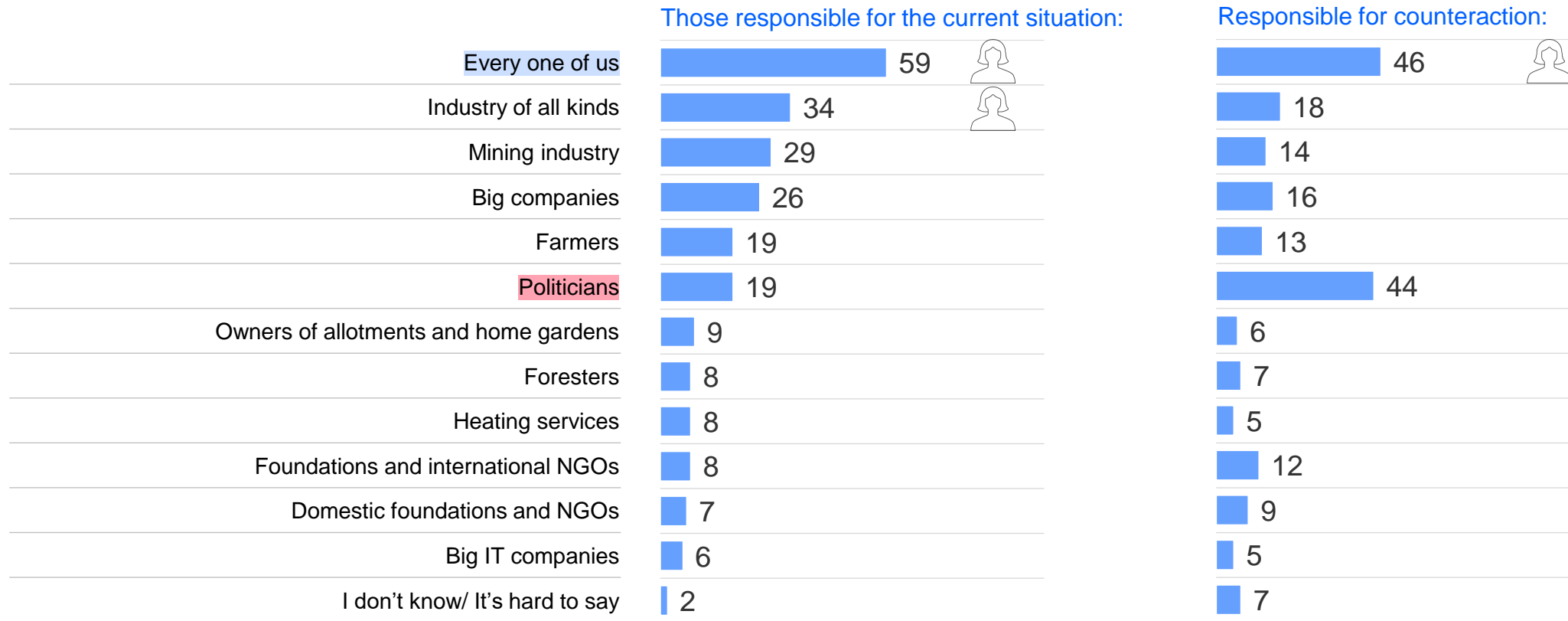
Czech Rep.



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

The responsibility for the dangers related to water shortages is mainly attributed by young Czechs to themselves and other members of society (59%). They also relatively often attribute it to industry in general (34%), to mining industry (29%) and to large corporations (26%).

Interestingly, politicians are responsible for these shortages according to only 19% of 20-year-olds, while as many as 44% of them think that politicians should be the ones to address the shortages. A similar pattern can be seen in other categories: those at fault are not adequately responsible for counteracting (with the exception of politicians as mentioned, and international foundations).

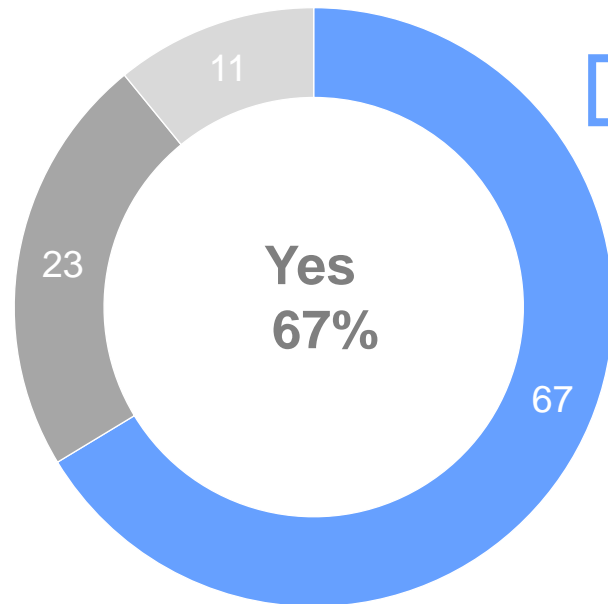


What activities do young Czechs take to reduce water consumption?

More than two-thirds of young Czechs (67%) declare that they take actions to reduce water usage. 70% and more of Czechs in their twenties take those steps in the bathroom, reducing the use of running water and 43% reduce their laundry.

There is an interesting discrepancy regarding some of the activities declared as possible to reduce water consumption (see previous slide): more people notice than actually perform them (marked in red). Conversely, some activities are performed more often than mentioned as generally possible (highlighted in blue).

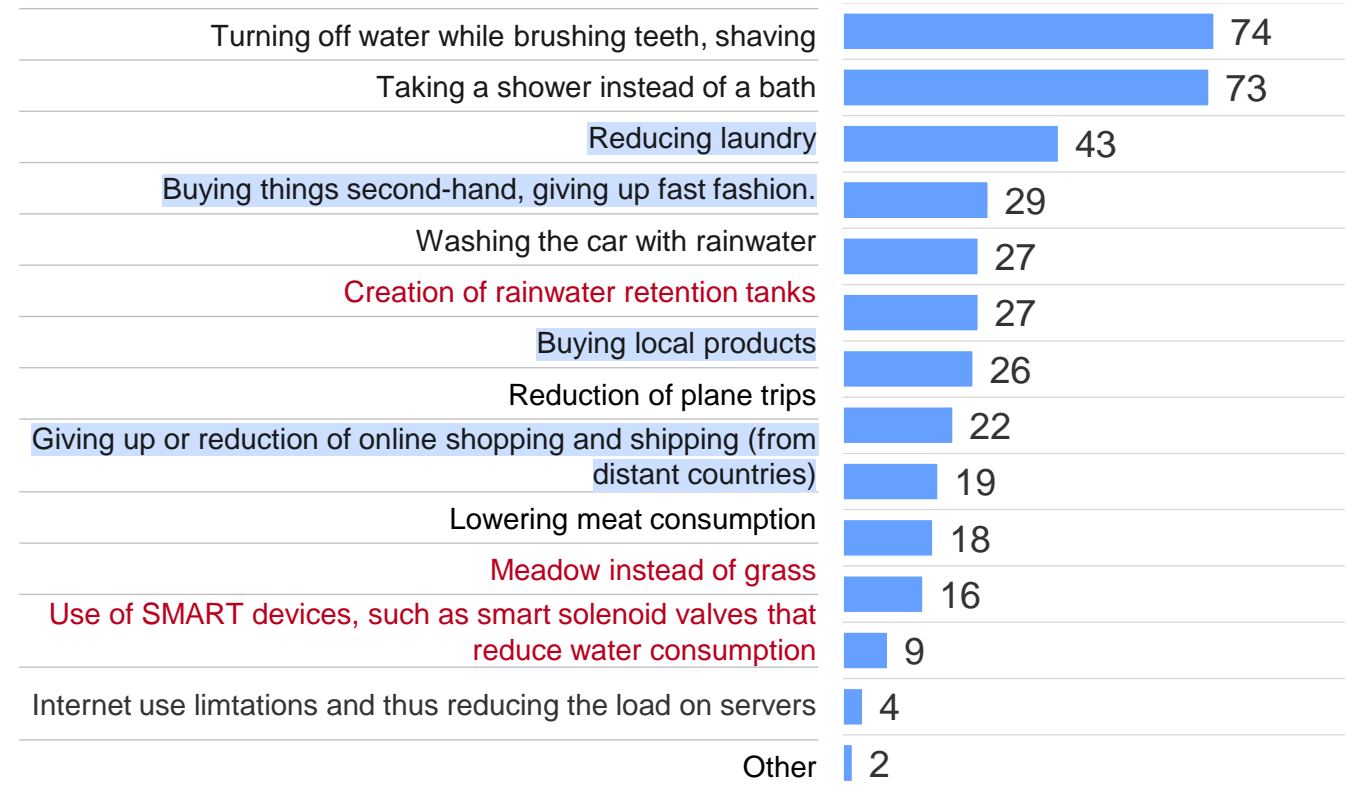
Do you take action to mitigate water crisis?



N=332

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

Types of activities taken:

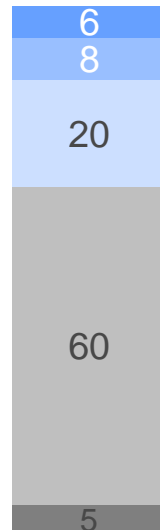


Should crop irrigation be forbidden in times of drought? And car washing?

60% of young Czechs seems to accept farmers watering the fields during water shortages. Only one third (34%) to some extent feels that it could not be right.

Opinions on washing the car when water is scarce are sharper; 83% of 20-year-olds condemn this in some way.

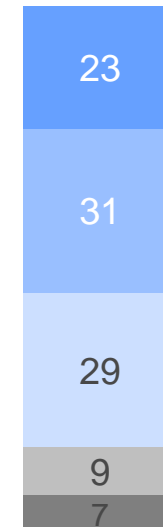
Irrigating plants during drought.



- 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.

0

Washing the car during drought.



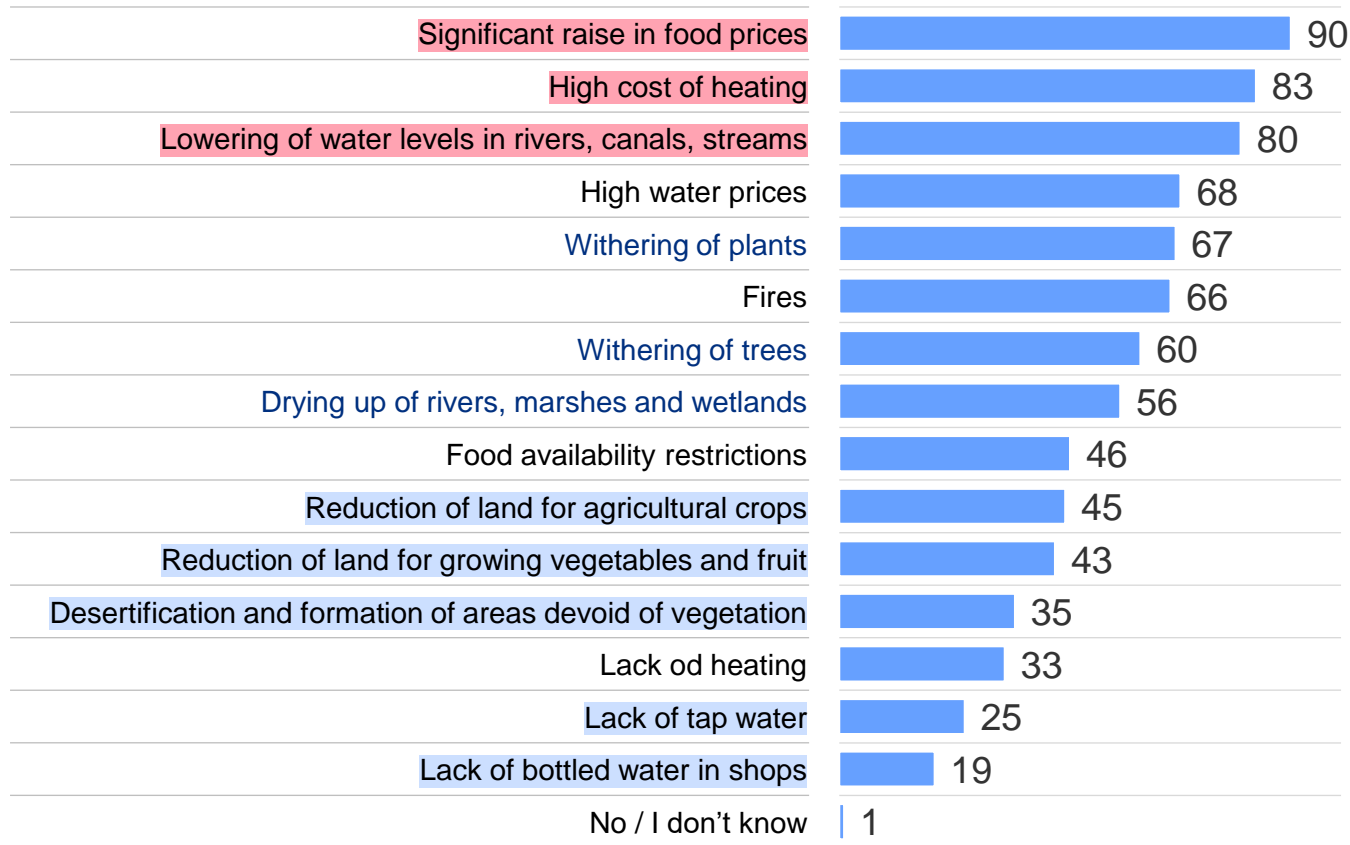
N=513

Young Czech women judge this most harshly, more harshly than their male peers (27 vs 32+).

What symptoms of water scarcity have young Czechs experienced themselves?

Almost everyone have experienced increase in food (90%) and heating (83%) prices. Lowering of water levels in rivers, canals and streams was observed by 80% of 20-year-olds. Other symptoms of withering and desertification are also pretty well known to them (56 – 67% have encountered some). 2/3rd witnessed fires. The lack of bottled water in shops closes the list.

In general, high scores and percentages have to be noticed: the signs of water scarce are really well known.

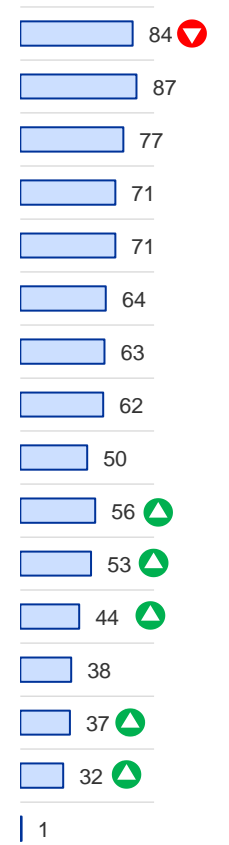


It is young women who, in personal experience, are more likely to perceive rising food and heating prices and fewer food choices.
N=513

20-24 y.o

Younger in their twenties were indeed more likely to mention the drying up of rivers, marshes, wetlands and the withering of trees.

N=425

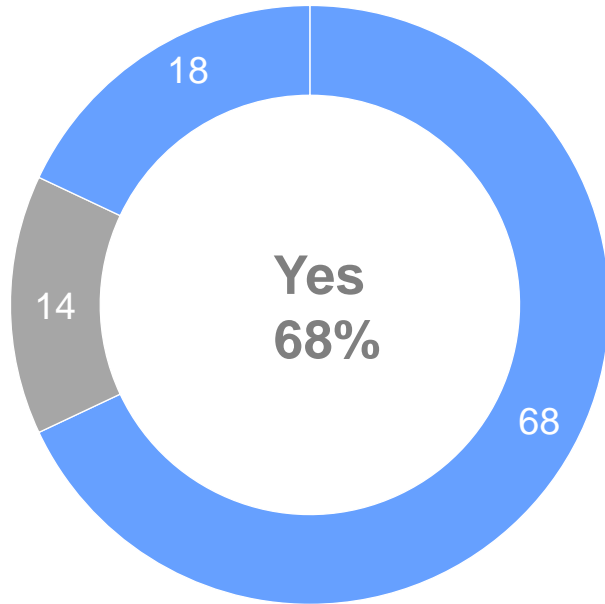


Attention is drawn to the group of 20-year-olds linked to agriculture; they perceive symptoms of water scarcity significantly more often when it comes to daily water supply and to decreasing arable land.

N=409

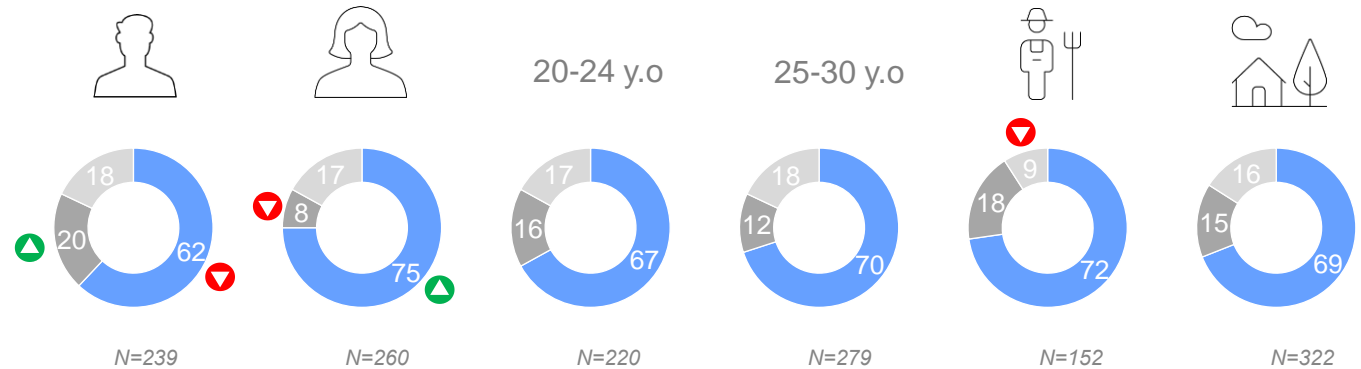
In the opinion of 20-year-olds, do Czech farmers experience water shortages?

Opinions on water scarcity as perceived by Czech farmers.



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

As much as 68% of young Czechs thinks farmers in the country experience water shortages. Among those convinced, women express this conviction significantly more often (75%) and with greater certainty (only 8% articulates the opposite). Men significantly more frequently claim that it is not a visible problem (20% directly say „no”, topbox 38% is somehow against or not sure).

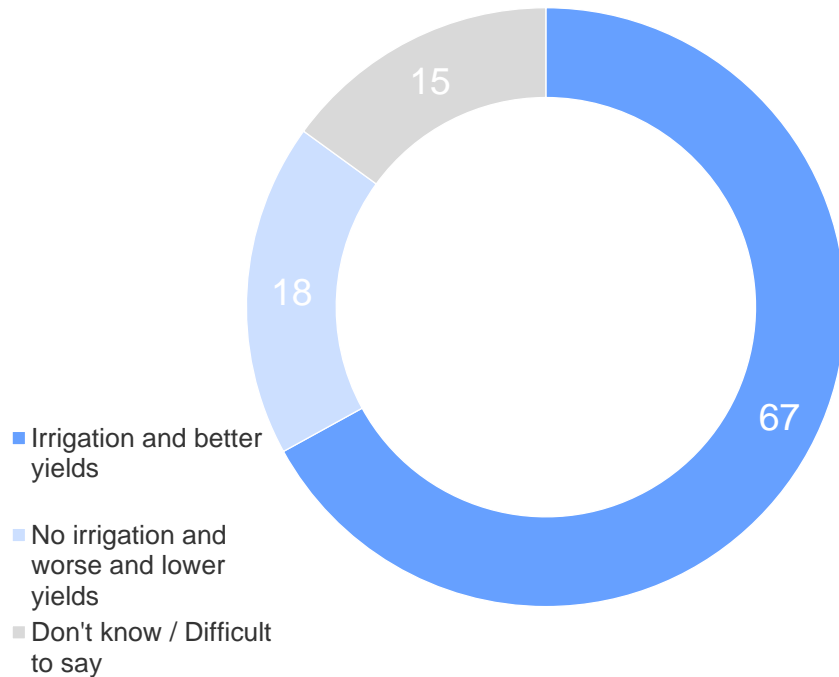


How do the 20-year-olds think farmers would act in case of a drought?

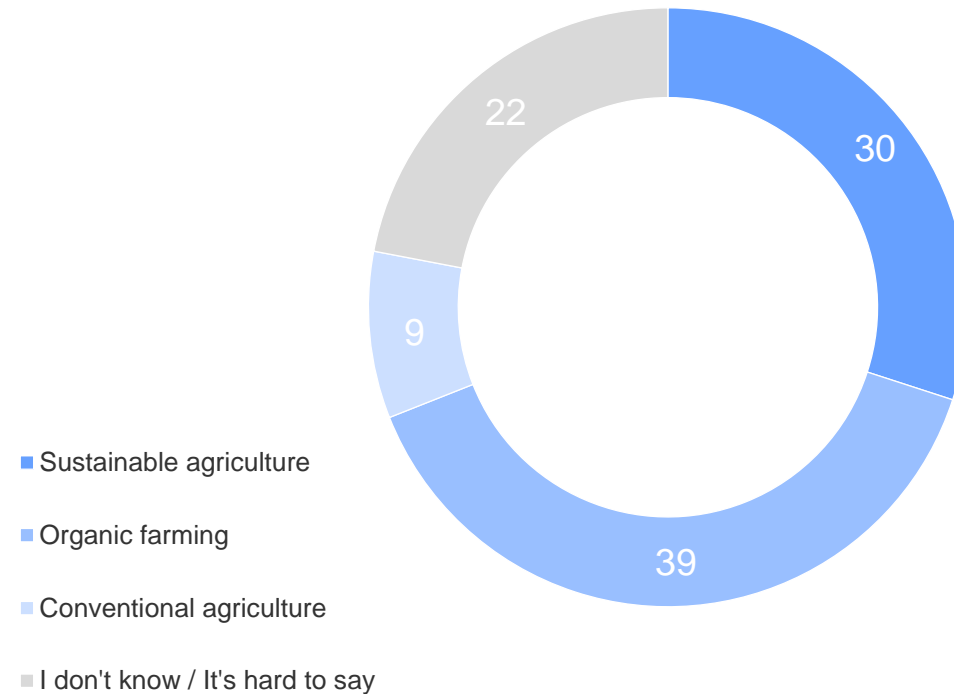
2/3 of young Czechs believe that domestic farmers in case of real water shortage would prioritise irrigation and higher yields over coming to terms with the conditions and sticking to lower yields (18%).

One in three pointed to sustainable farming (30%) as being the most water-efficient type of agriculture, but it is the organic one that is the most popular among young Czechs (39%). Conventional agriculture seems to have a really bad opinion when it comes to water efficacy (8%).

I think Czech farmers would choose to...



The most water-efficient type of agriculture:

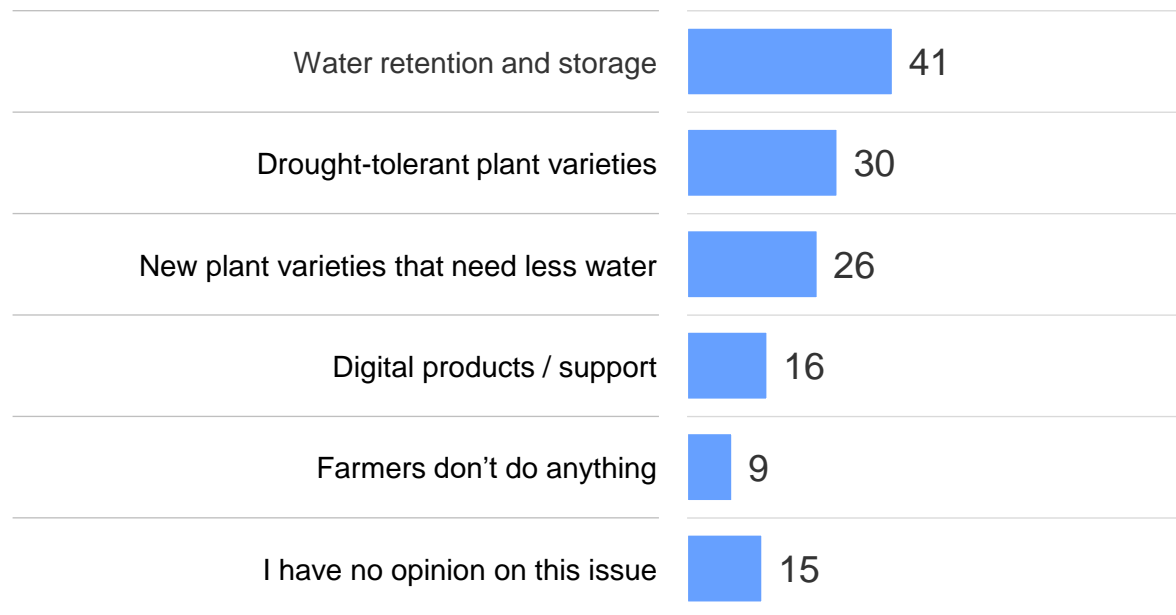


Do young Czechs think there is room for a new offer for farmers to support them in the event of water shortages?

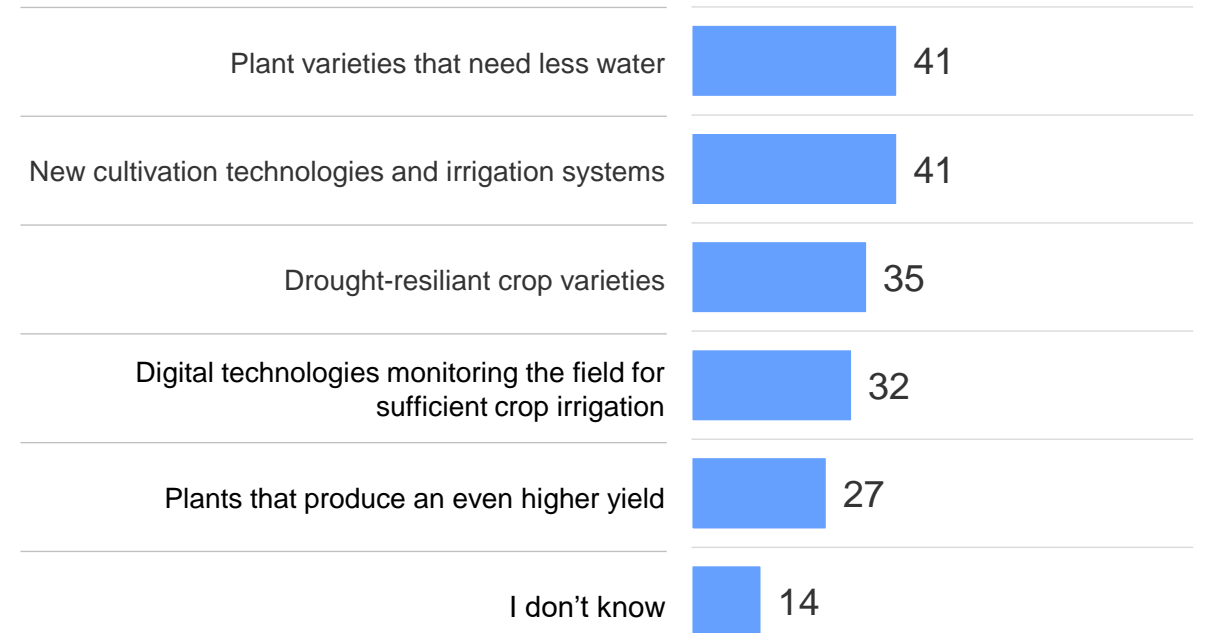
41% of respondents believe that farmers are now choosing solutions that retain and store water. One in three 20-year-olds think that farmers are using new drought-tolerant plant varieties or those that need less water.

Among the solutions that could be offered to farmers, 20-year-olds point with equal frequency to plant species that perform well in times of scarcity to new cultivation technologies and irrigation systems. Digital technologies to monitor field moisture also indicated by one in three young Czechs (32%).

Solutions that Czech 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 a sunset. The sun is low on the horizon, creating a warm, golden glow. The runner is wearing dark shorts and athletic shoes. The background shows a hazy landscape with rolling hills or mountains.

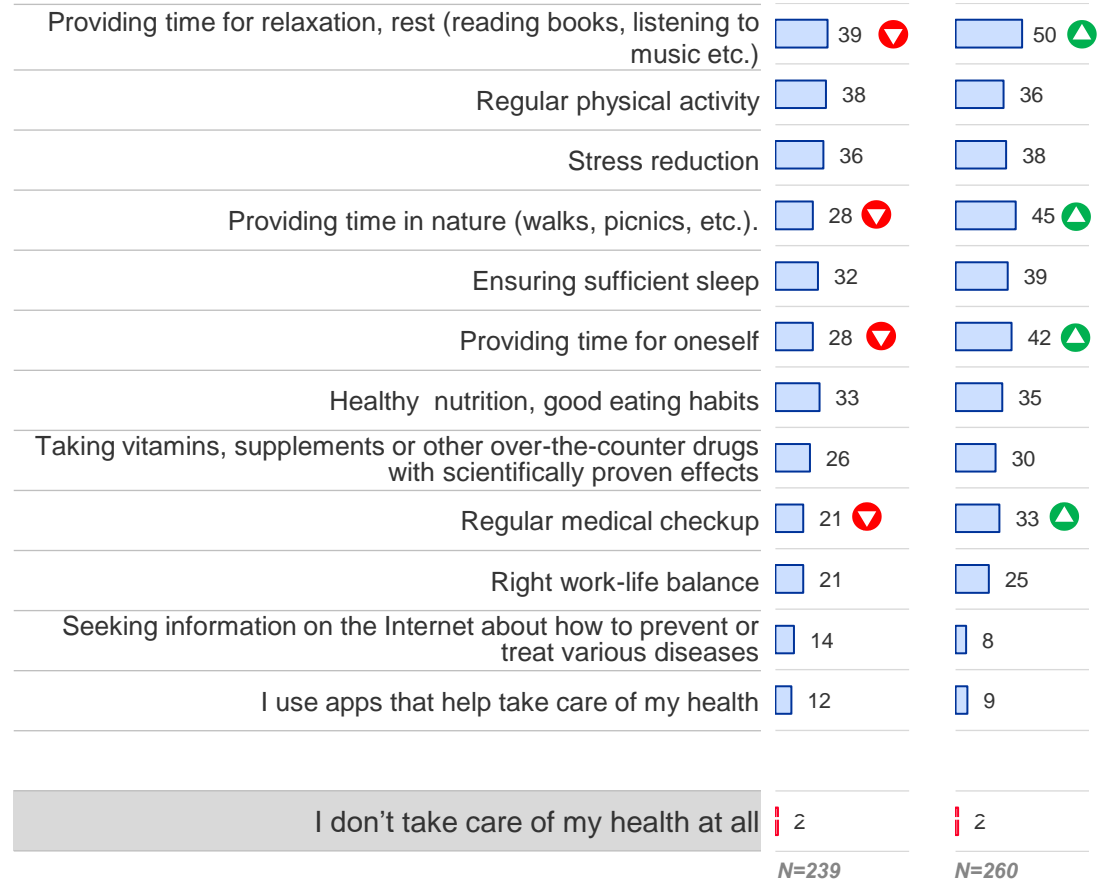
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02

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

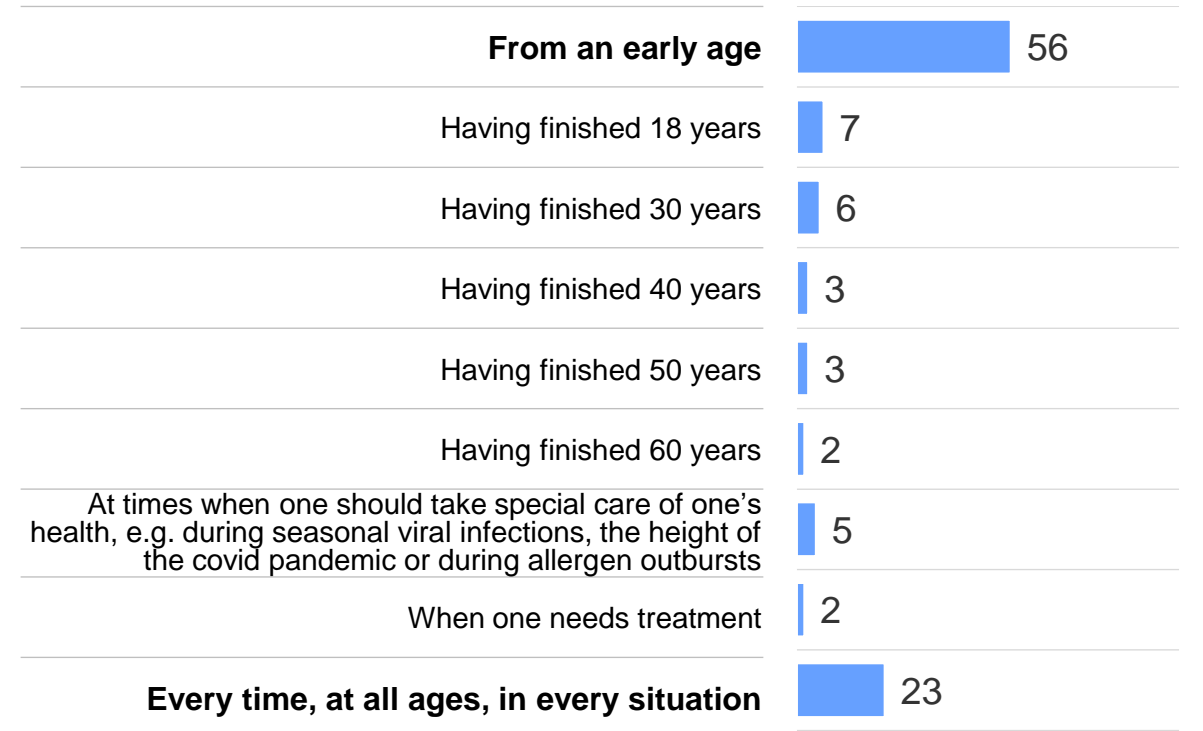
How do young Czechs take care of their health?

In taking care of themselves for real, young Czech women more often take time to relax, ensure themselves contact with nature and time for themselves. They are also significantly more likely than men to examine themselves regularly (one in three).



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

More than half of young Czechs (56%) believe that health should be taken care of from an early age. Every fourth thinks that it is always and in any situation. Those two beliefs prevail.

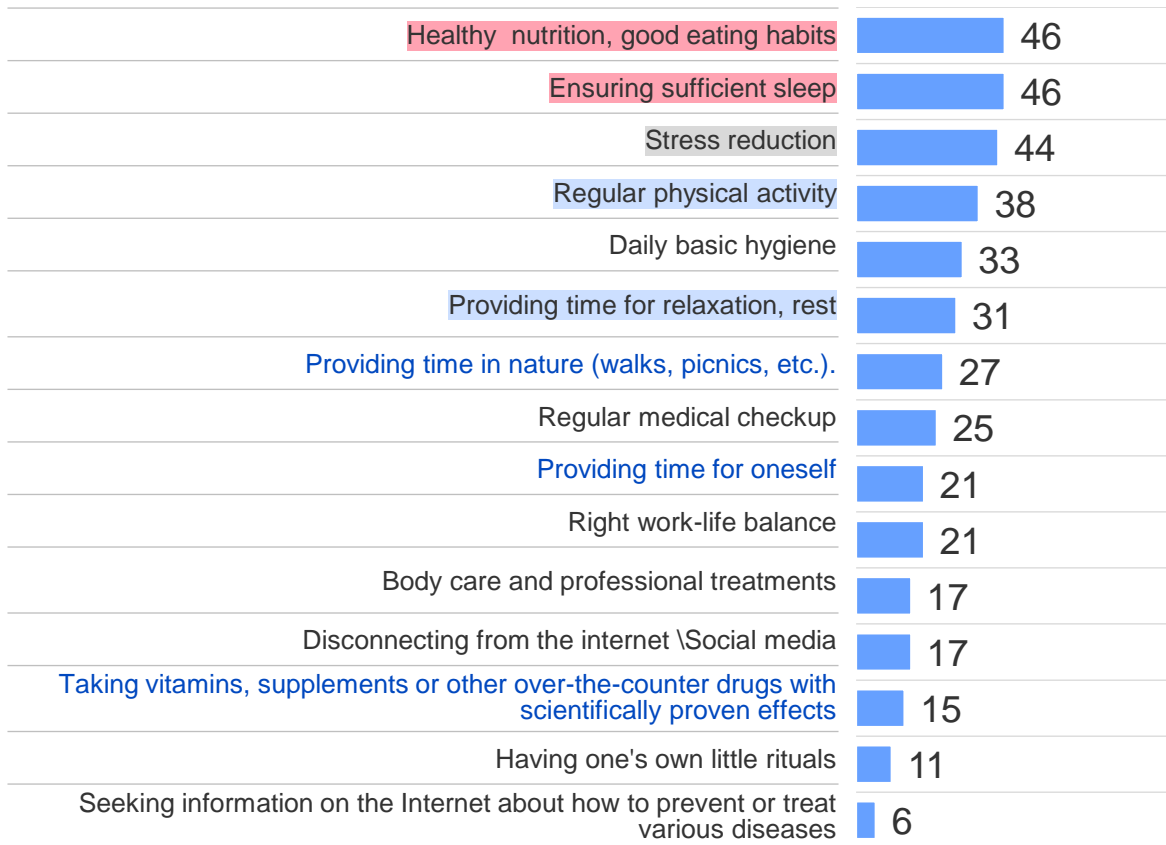


Self-care and caring for one's health: expressions.

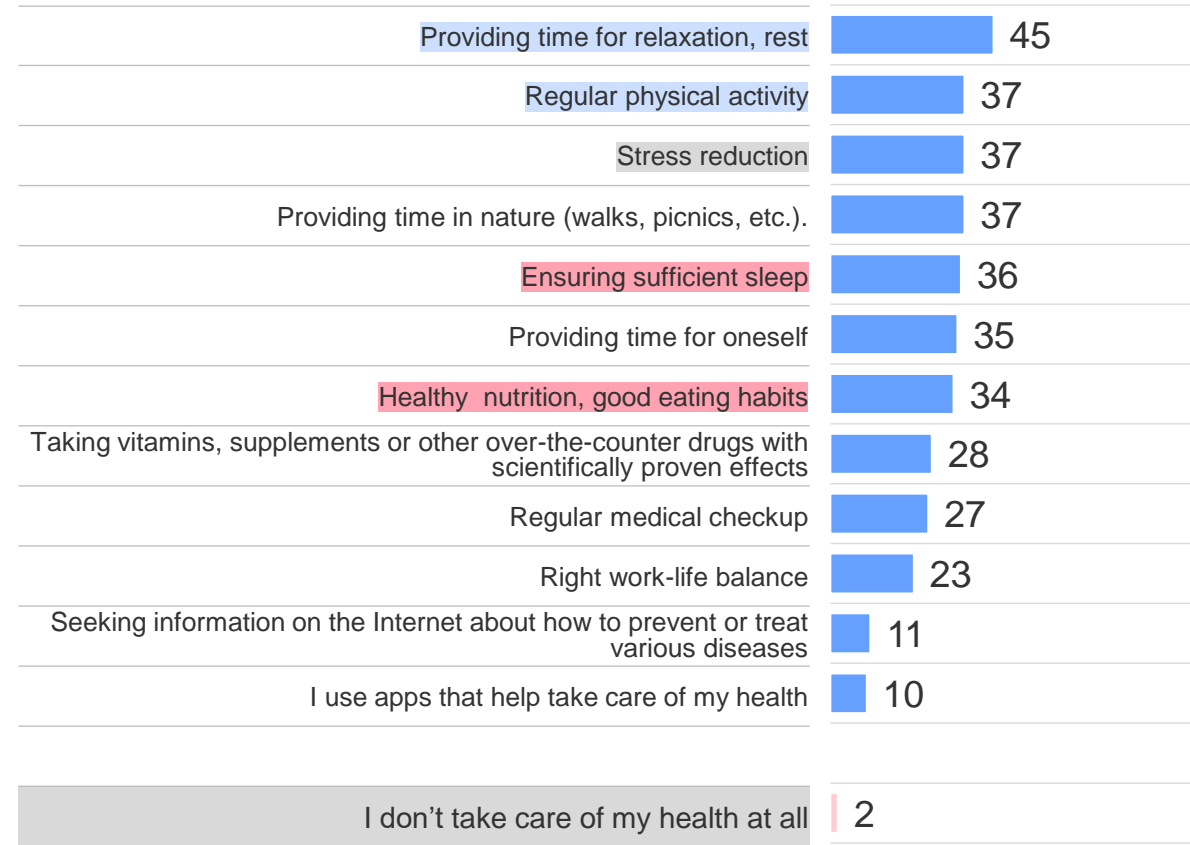
Nearly half (46%) of Czech 20-year-olds regards healthy nutrition and good eating habits together with ensuring oneself sufficient sleep to be important expressions of self and health care. In real life, however, they don't seem to choose those activities: relaxation and rest together with regular physical exercise leads.

In general there are many changes between positions and percentages between manifestations regarded as pro-healthy and ones that young Czechs actually most often perform. Not that many Czechs (36%) seem to sleep enough and eat healthy. On the other hand, almost twice as many actually take vitamins and supplements (28%) in comparison to level declared (15%).

Manifestations of self-care and health care:



Actions taken to foster health:

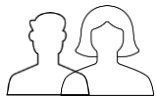


How do 20-year-olds prefer to contact their doctor?

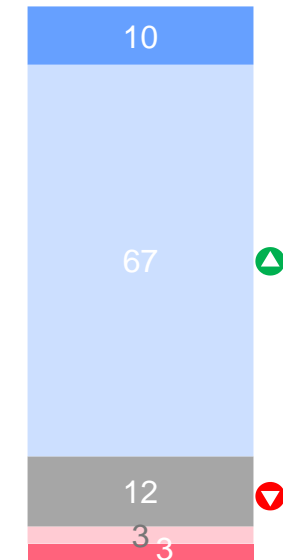
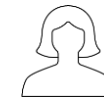
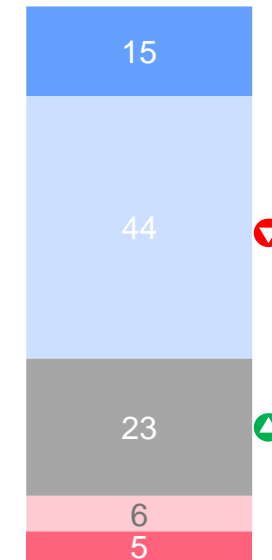
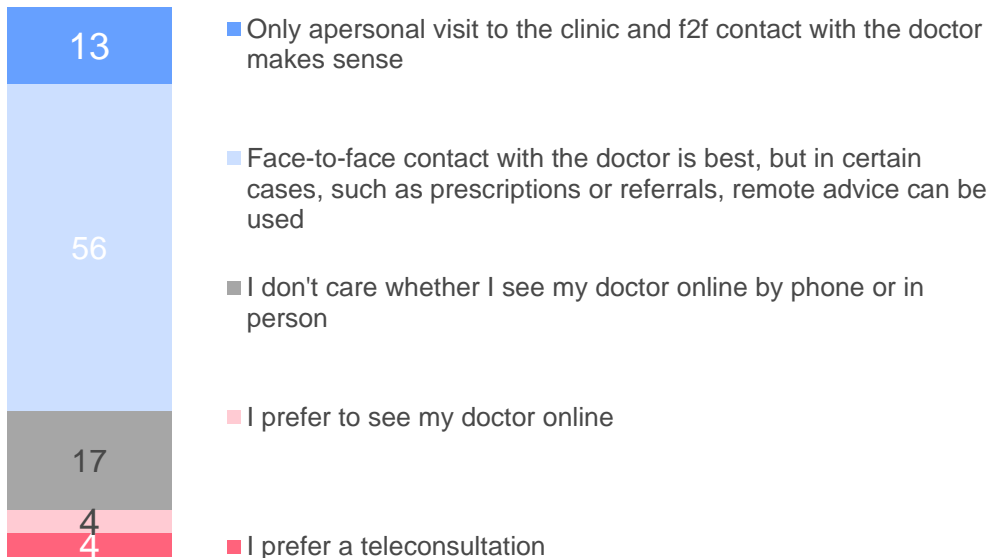
Among Czech twenty-year-olds there is a clear preference to meet a doctor in person (69%). Interestingly, young Czechs are at the same time willing to accept remote advice for simple situations such as issuing a prescription or making a referral.

A small percentage of respondents explicitly accept online appointments (4%) and teleconsultation (4%).

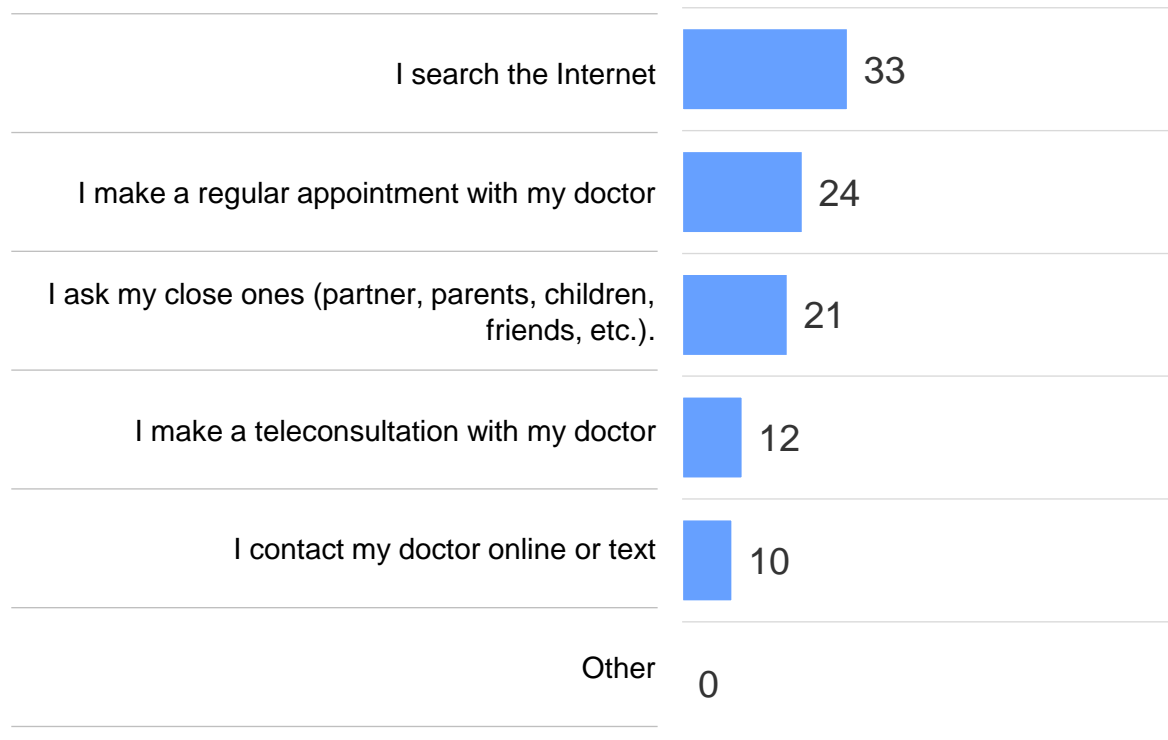
The women's group is very strong on this issue: they are far more likely to declare that they prefer to see a doctor in person, and are far more reluctant to visit online.



Preferred type of medical consultation.



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



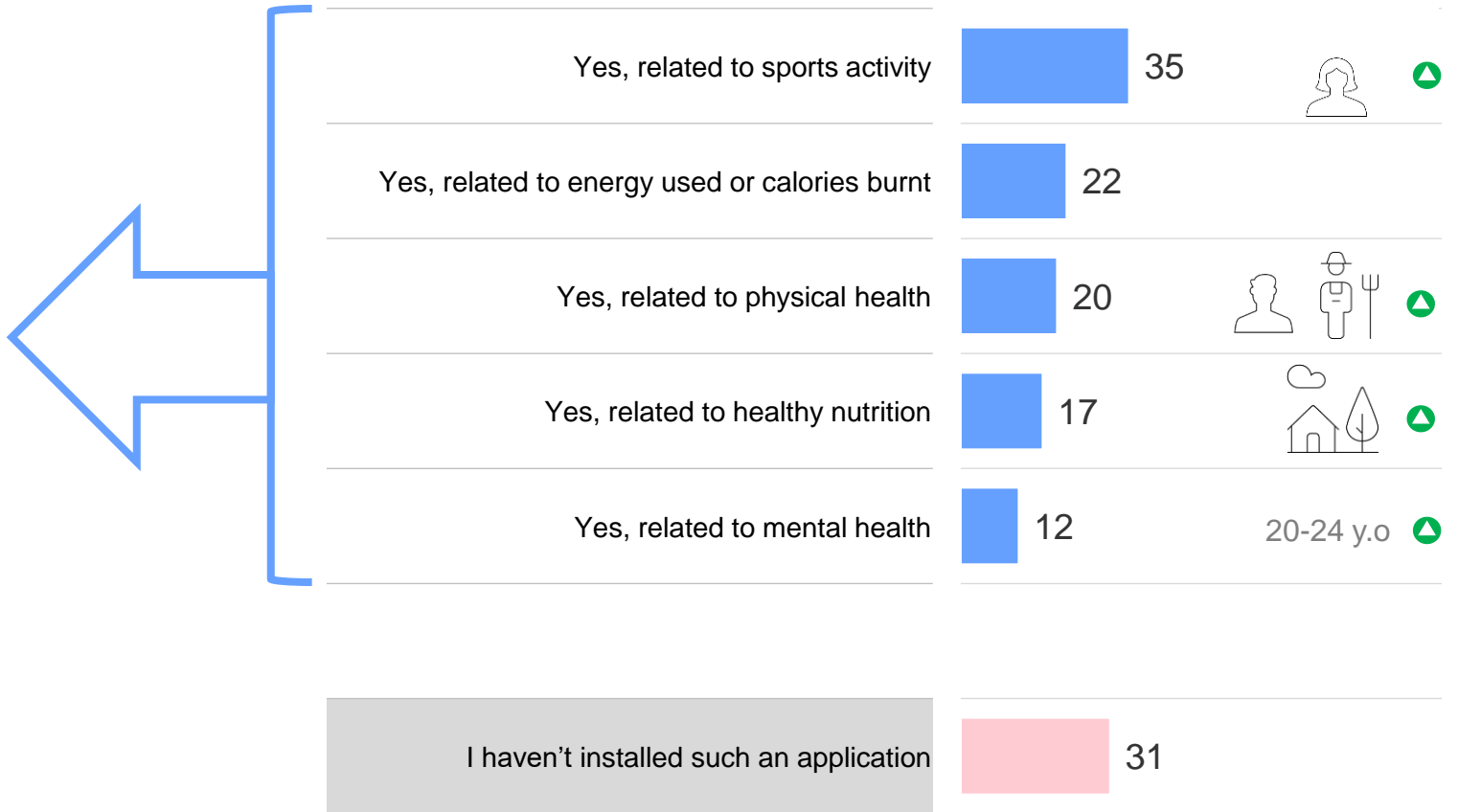
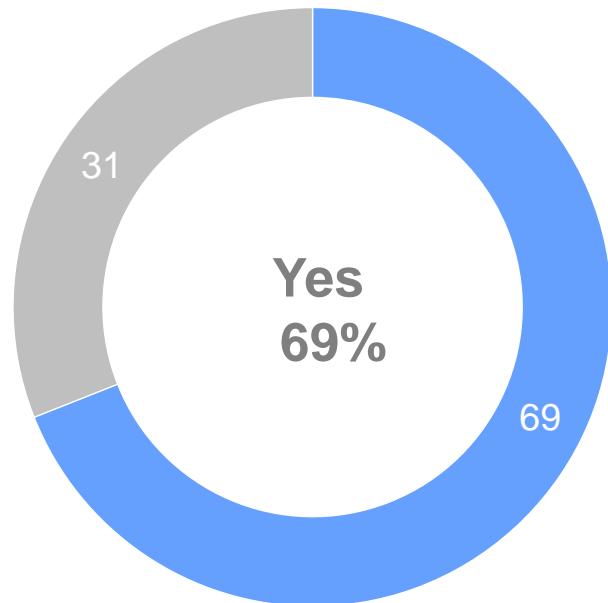
Young Czechs most often (33%, every third) search for information on the Internet first.

Nearly half of them (46%) make an appointment with a doctor in either form (face to face, teleconsultation, online, text). Traditional form of in person appointment is chosen by every four (24%) of them.

One in five (21%) turns to family.

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

More than two-thirds (69%) of twenty-year-olds have installed some health, exercise, diet or calorie-related application on their phones. Women significantly more often install apps related to sports activity whilst men – to general physical health. It's interesting to notice the significantly higher penetration by apps related to mental health in the group of younger 20-year-olds in Czech Republic.

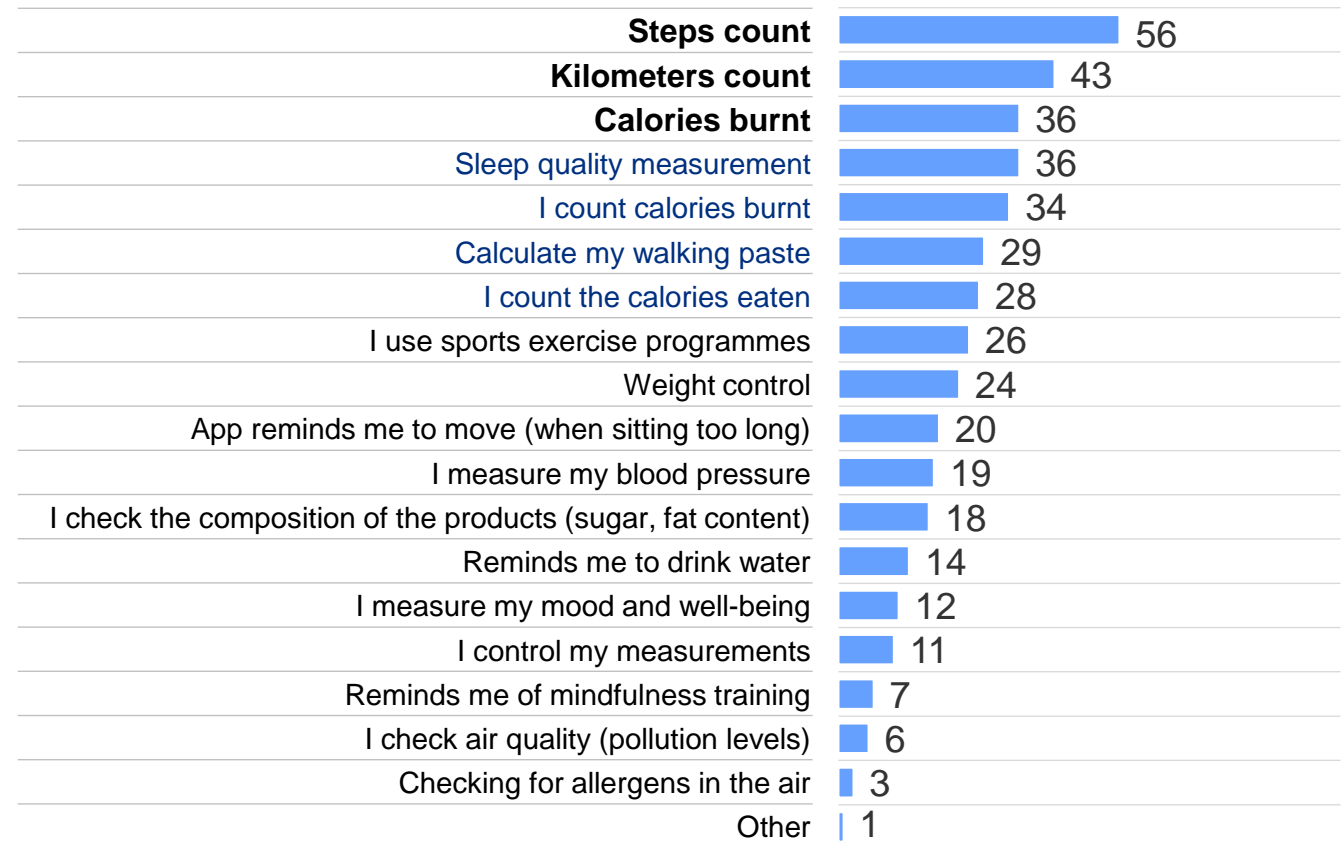
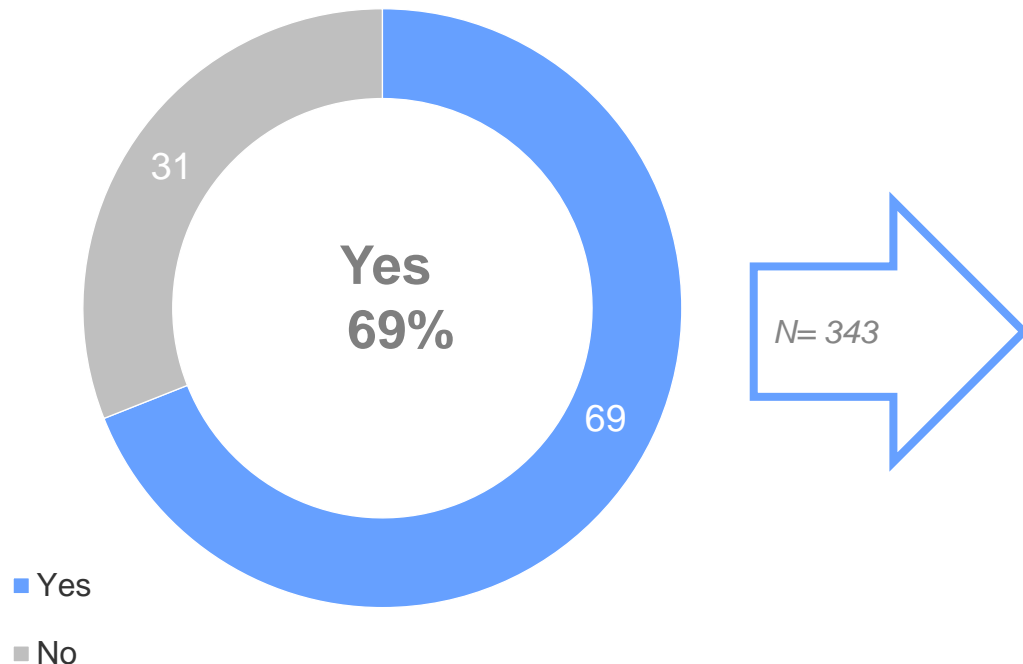


■ Yes
■ No

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

Among those, who have installed the apps on their phones, the step count, calorie count and calories burnt calculator are top three reasons behind installation. Quite popular (about 30% and more) are four further reasons (marked in blue). In general, the most popular reasons are ones connected to walking/ running and processing food/ calories. Air related measurements (pollutions, allergens) are the least frequent.

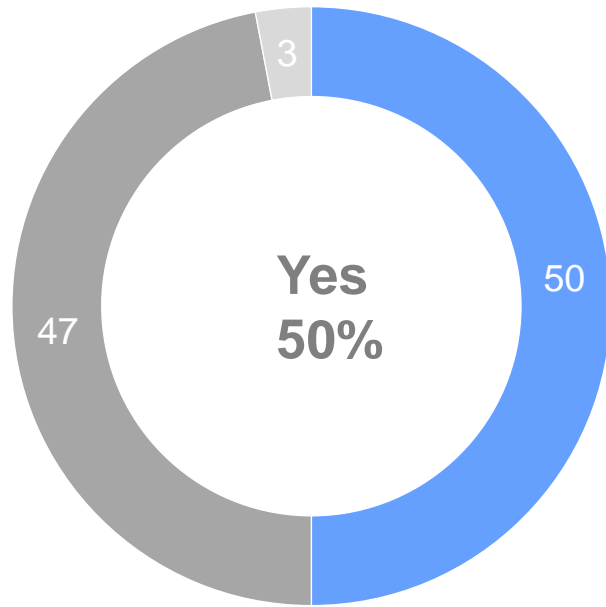
Have you installed the application related to health on your phone?



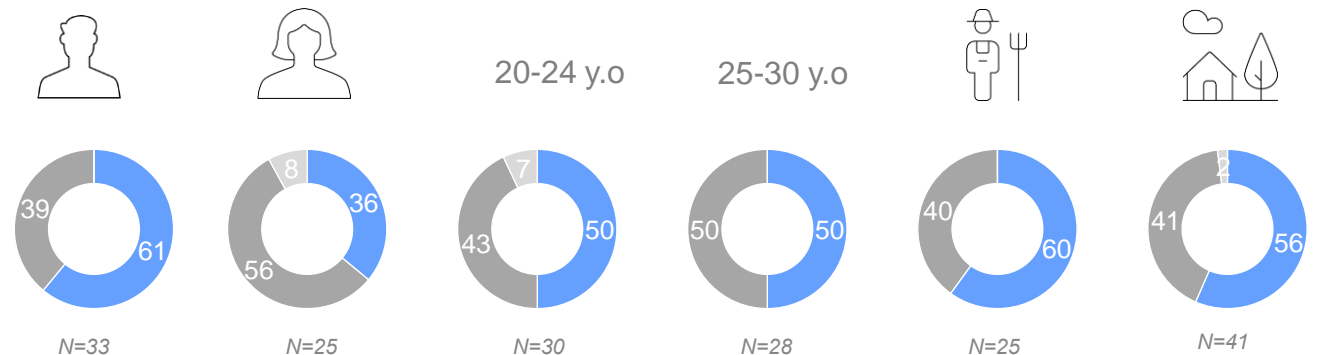
Do young Czechs share the data collected by the app with the doctor during medical consultations?

Among young Czechs, attitudes towards sharing data from apps with their doctors are polarised. Exactly half of them presents the data collected by mobile apps to their doctor. The other half either does not do so (as much as 47%) or has no opinion on the matter (3%).

Moreover, the attitude is quite homogeneous, with no significant differences between the groups.

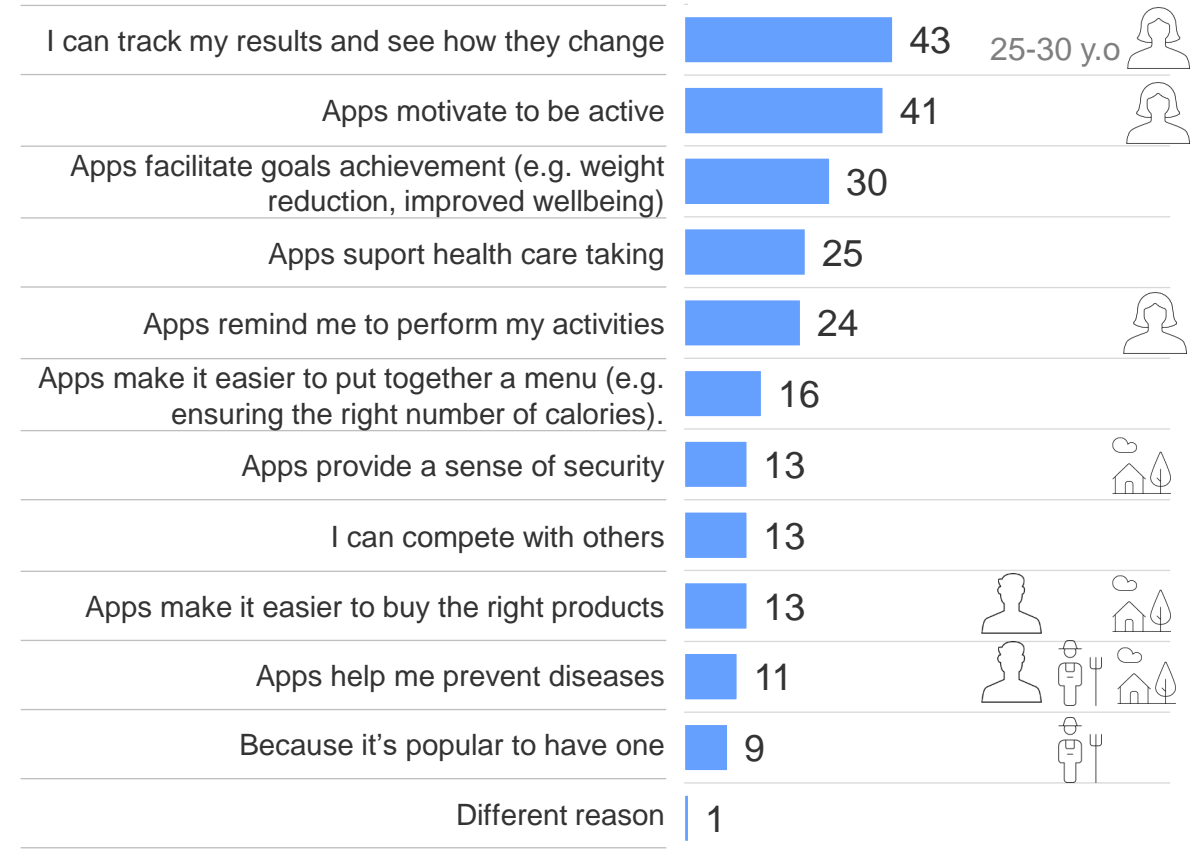
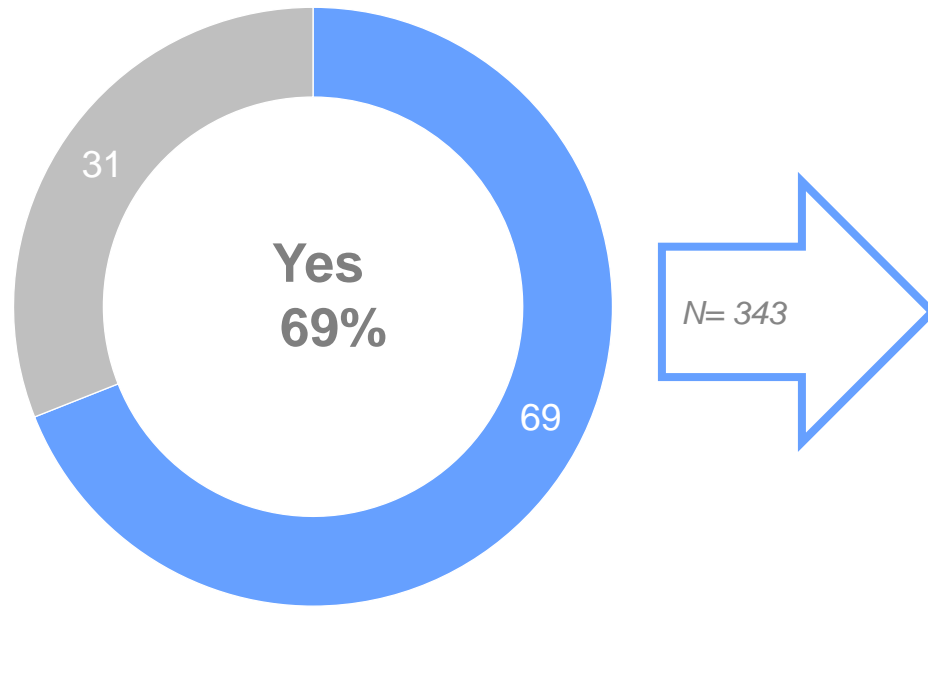


- Yes
- No
- I don't know / It's hard to say



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

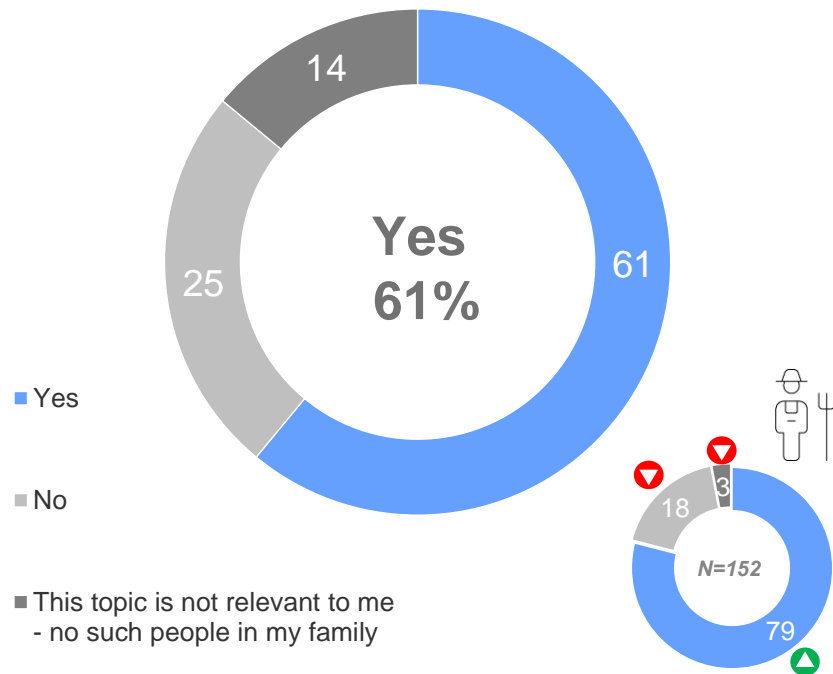
The most popular reasons behind installing health-related apps are performance tracking and motivation to be active. Every third person indicates achieving their health-related goals as an important reason for installation. Women and younger respondents even more often does so. Male respondents significantly more often install apps because they support them when buying products and because of their general preventive effect.



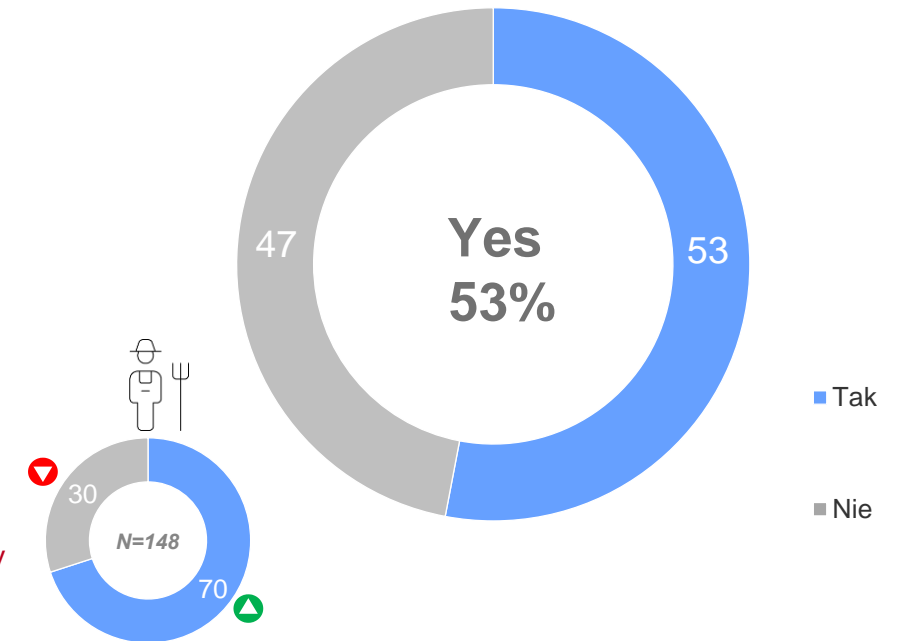
Do 20-year-olds care about the health of elderly family members? What do they know about the devices their charges use?

As many as two-thirds of Czech 20-year-olds care about the health of the elderly in their family. Among them, those who are aware that their charges use some sort of measuring medical device are slightly outnumbered. Knowledge of this is declared by 53% of those caring for respondents.

Caring for the health of older family members.



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

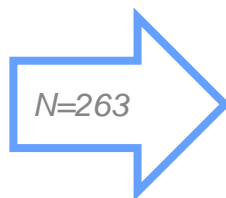
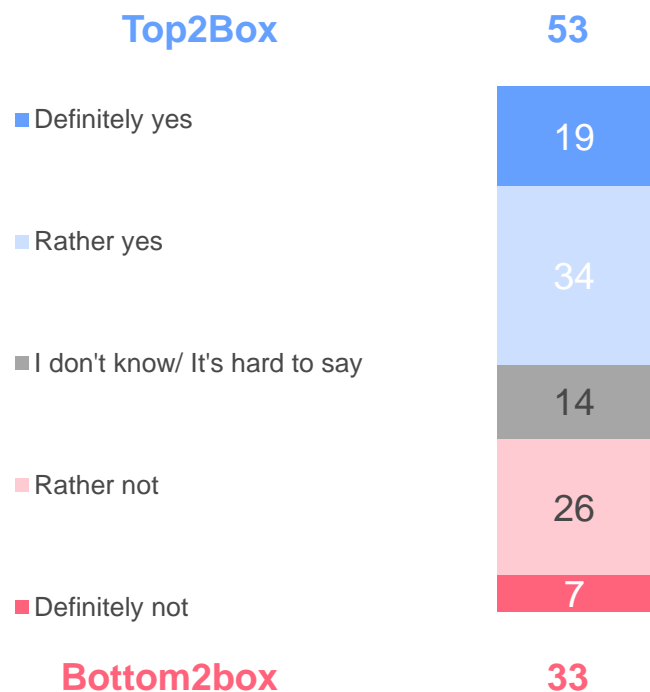


Those in their twenties associated with agriculture are significantly more likely to care about the health of older family members. They are also significantly more likely to declare that older people in their families use electronic devices to monitor their health (e.g. blood pressure, heart rate, etc.).

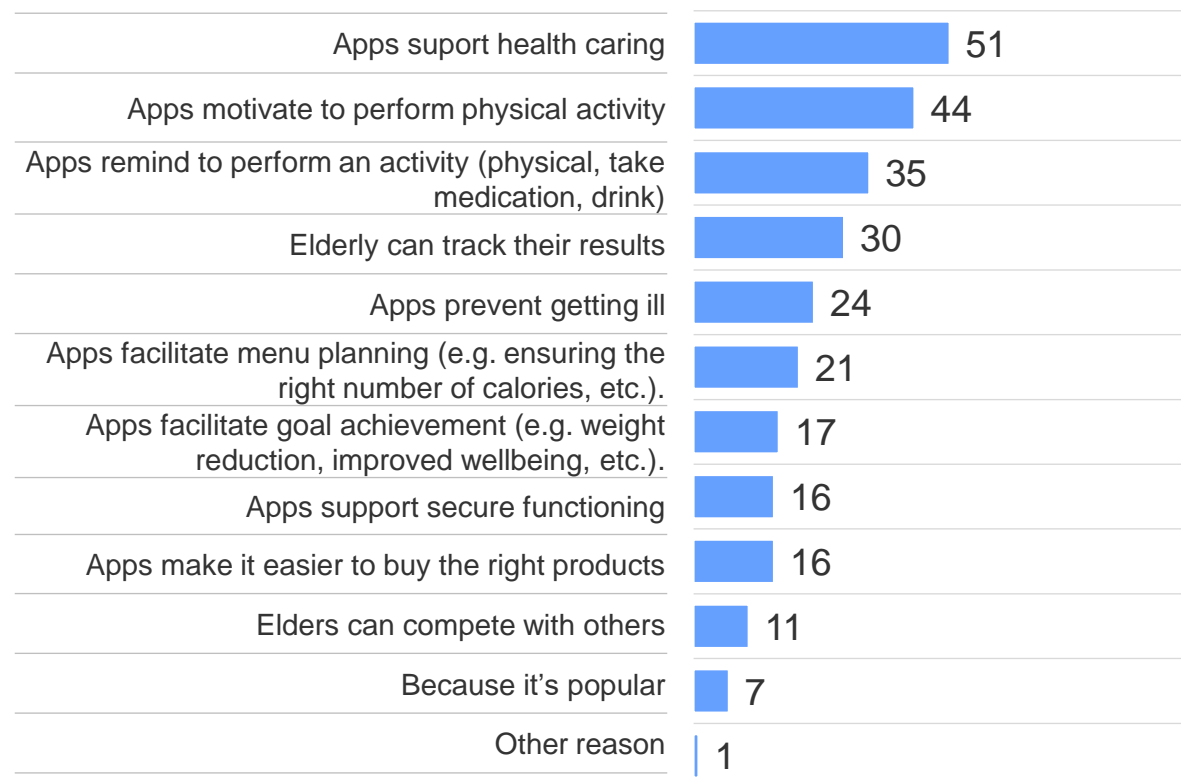
Do health or sports apps for older people make sense?

Over half (53%) 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. About one in three Czech 20-year-olds thinks that older people can benefit from apps in terms of general reminder to do something health-related (take the medication, move, drink, 35%). Almost similarly popular (30%) is the belief that the elderly can track changes in performance.

Are health and sports apps for elders?



Justification for the application:



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