



**STADA HEALTH
REPORT 2023**

A LACK OF PREVENTION IS ERODING EUROPEANS' HEALTH



» WITH THE STADA HEALTH REPORT 2023, WE AIM TO DO OUR PART IN CONTRIBUTING TO A MORE HOLISTIC UNDERSTANDING OF HEALTH-RELATED ISSUES IN CHALLENGING TIMES. «

Editorial

The past few years have been among the most trying times in recent history. Health systems, as well as the health of individuals, have been placed under extreme strain during the pandemic.

As we build our post-pandemic world, several questions and challenges stand before us: how do we collectively and individually ensure we are in the best shape to face future health pandemics and outbreaks? How do we address not only acute needs, but also chronic diseases? How can we improve preventive measures and services? What impact have recent times had on our mental health?

To provide scientifically validated evidence on these and many more questions, we are proud to unveil the results of the STADA Health Report 2023. This unique research draws on extensive online surveys of around 32,000 European adults across 16 countries, thereby providing a comprehensive exploration of how individuals across the continent are adapting to health-related challenges in an ever-changing world.

The findings of the STADA Health Report 2023 are in equal part concerning and encouraging, as well as often eye-opening.

In this era of heightened economic uncertainties and crises, the study uncovers a pressing concern: inflation-induced financial strain has compelled a significant proportion of the population to reduce healthcare spending. At the same time, satisfaction with healthcare systems continues to decline.

The palpable fear of conditions such as cancer stands in stark contrast to the lack of attendance at recommended screenings. Here, the data represents a clear call to action for better preventive healthcare.

On the other hand, positive signs are emerging on anxiety and mental wellbeing. The anxiety and uncertainty that characterised the pandemic's onset have given way to a surprising enhancement in mental health and quality of sleep.

Exploring the intricate interplay between physical health, mental resilience, financial stability, and preventive care behaviours aims to provide a holistic picture of Europe's healthcare landscape for all stakeholders – not just for citizens and patients, but also those at the front line of delivering healthcare services – pharmacists, nurses, doctors, paramedics, wholesalers, pharmaceutical companies, publications, policymakers and politicians, among others.

This can only be achieved by sharing data and insights across the healthcare delivery network. As a leading supplier of medicines and healthcare products in Europe, we are committed to sharing and discussing widely the insights gleaned from the STADA Health Report 2023. For me, this is an embodiment of STADA's Purpose: Caring for People's Health as a Trusted Partner.

We look forward to working with you as a partner to create a healthier future for all.

Peter Goldschmidt
CEO STADA Arzneimittel AG

Origin, Objectives and Methodology

War, inflation, medicinal supply challenges: there seems to be no relief for Europeans in a post-Covid world. New crises have arisen, reinforcing each other and straining people’s lives. Forced to adapt, many Europeans have taken to drastic measures – some of which are to the detriment of their health. Meanwhile, another threat looms. Silent, easily overlooked, but dangerous nonetheless: a lack of prevention. Described by the WHO as the triad of health literacy, early detection and behaviours that support a healthy body and mind, prevention is a cornerstone of the wellbeing and overall satisfaction of the population.

Now that the pandemic has been declared over, we wanted to know how Europeans are coping amid new crises: what efforts are they putting into looking after themselves, in terms of both their mental and physical wellbeing? How knowledgeable are they about basic health-related topics? Has their health become more valuable to them after Covid? What are their worries and fears for the future? The answers to these questions and much more can be found in the STADA Health Report 2023.

Looking back

The STADA Health Report was originally conceptualised as a national study to examine the “health literacy” of the German population. Since then, it has become one of the most comprehensive studies in Europe, covering a variety of health-related topics over the years. Following the Report’s international launch in 2018, it has explored the European population’s behaviour as well as their physical and mental health regarding current trends

and events, and has brought to light corresponding developments and changes over time. True to STADA’s purpose of Caring for People’s Health as a Trusted Partner, the Health Report has since provided a reliable basis for discussion and a data-based indication of how Europeans feel about health-related matters at different points in time. In doing so, the Health Report does not shy away from asking the tough questions, as this is the only way of uncovering truths and pressing issues that might demand inconvenient discussions and require solutions.

Sample and methodology 2023

The 2023 cross-national survey was conducted by Human8 (formerly InSites Consulting) via an online questionnaire from mid-March through mid-April 2023 in 15 of the following 16 countries: Austria, Belgium, the Czech Republic, France, Germany, Italy, Kazakhstan, the Netherlands, Poland, Portugal, Romania, Serbia, Spain, Switzerland, the United Kingdom and Uzbekistan. Uzbekistan was the only first-time participant this year, and its field phase took place from 4th to 19th July. The panel included a total of 32,011 people with around 2,000 respondents aged 18 to 99 in each country. As always, the survey is representative in terms of age, gender and region.

The questionnaire consisted of more than 30 questions covering topics such as war and crisis, health prevention and knowledge, satisfaction with national prevention services and healthcare systems, mental health and more.

Geographically, Kazakhstan and Uzbekistan form part of Central Asia. For the sake of this report and its readability, both countries and the results from their respective surveys, together with the 14 participating European nations, have been subsumed under the term “European”. ■



»» HOW ARE EUROPEANS COPING AMID NEW CRISES? ««



■ **Flying blind:**
why Europeans
are foregoing
prevention -
thus putting their
health at risk



In recent years, the fragility of our health has become more apparent than ever. The good news is: the European population has taken notice and people are once again taking charge of their wellbeing. On the flipside, however, Europeans do not seem to take well-established means of health prevention very seriously, as many of them do not attend health screenings that are recommended to detect diseases like cancer early on. A dangerous trap that could come to cost Europeans dearly.

Over the last year, 73 percent of Europeans have taken at least some action to improve their overall health. Eating better tops the list, with 27 percent saying they have eaten more healthily in the last 12 months. The same number have increased their vitamin intake. The most avid proponents of healthier diets are people in Serbia (47 percent), Romania (43) and Spain (40).

A significant number of Europeans have also sought more advice from healthcare professionals – 22 percent from their GP, 16 percent from pharmacists. In France (39), the Czech Republic (32) and Belgium (31), people were especially keen to seek their pharmacist's opinion on health matters.

Preventive screenings on the uptake after Covid – a drop in the ocean?

Preventive health check-ups, a cornerstone of maintaining good health and detecting diseases early to increase the likelihood of effective treatment, were attended more frequently by 17 percent of Europeans over the past 12 months. In Germany, Poland (26 each), Italy (25) and Austria (24), people were particularly eager to get checked out – perhaps to catch up on appointments they missed during the pandemic.

»» FOUR IN TEN EUROPEANS (42) DO NOT ATTEND ANY PREVENTIVE HEALTH CHECK-UPS. ««

But what is the overall status quo of preventive healthcare in Europe? Are Europeans aware of check-ups they should attend, and do they know which are covered under their respective national health services? Of course, attendance rates depend heavily on whether a screening is covered by insurance or, ideally, is easily accessible as a free public service. Regardless of what keeps people from attending, screenings can save lives. Identifying barriers is therefore crucial to improve healthcare services, which is urgently needed, as the Health Report 2023 illustrates.

Close to 9 in 10 Europeans do not receive adequate preventive healthcare

Overall, the preconditions for preventive healthcare differ greatly across different European countries. This does not only apply to the programmes that are offered, but also the individual age recommendations and intervals in which preventive health checks take place. Additionally, some countries offer a great range of regular check-ups free of charge for all, some require patients to



cover some or all cost unless they belong to a specific at-risk group. A number of countries also report long waiting times for state-issued prevention programmes, pushing those who can afford it to seek private care.

Four in ten Europeans (42) do not attend any preventive health check-ups. Of the remaining 58 percent, only 15 percent can confidently say they attend all appointments that are relevant to them. In Uzbekistan, however, 38 percent claim they regularly attend all relevant preventive appointments.

Following the Europeans' self-assessment, 85 percent of them are not receiving adequate preventive healthcare. Looking only at the number of people who do not attend any check-ups at all, Serbia and Poland (62 each) and Romania (60) lead the way, meaning that almost 2 in 3 people in these countries do not get any check-ups at all.

The most frequent screening procedure in Europe is the gynaecological check-up, with 68 percent of women saying they usually have one. In some countries, this might in part be due to regulations requiring women to both personally pick up prescriptions for contraceptive medication at their GP's or gynaecologists' surgery, and undergo regular check-ups to obtain such a prescription in the first place. In the Czech Republic, almost 9 in 10 women (88) say they regularly attend gynaecological check-ups. Austrians (85) and the Swiss (83) also take them very seriously – almost twice as seriously as women in the Netherlands and Uzbekistan (42 each) or the UK (43).

Dental check-ups come in second on the list of most frequented health screenings for women with 61 percent regularly having them. Country-specific regulations or reimbursement and bonus programs to encourage regular dental check-ups might drive the majority of Europeans to get dental checks regularly. One in two European women (51) say they routinely have a general check-up, making it the third most frequently attended preventive appointment – especially in Serbia (68), the Czech Republic (67) and Austria (64).

85%

OF EUROPEANS ARE NOT RECEIVING ADEQUATE PREVENTIVE HEALTHCARE.



Only 1 in 2 women get regular checks for breast cancer

Considering that almost eight in ten European women (77) rank cancer in their top three most feared diseases, they do surprisingly little to ensure early detection. According to the European Commission, breast cancer was “estimated to be the most diagnosed tumour among all cancer types and the first cause of cancer death among women” in 2020 – and experts expect this trend to continue. Still, regular breast cancer screenings are carried out by only 50 percent of women.

The most frequently sought check-ups for cancer detection in men are screenings for prostate (32) and bowel cancer (31). For prostate cancer, Austrians lead by example with 48 percent of men attending appoint-

ments, together with Portugal (44) and Germany (42). Checks for bowel cancer are taken most seriously by men in Belgium (46), France and Spain (42). In accordance with most country’s recommendations, attendance rates for both cancer types increase with age. Early detection for testicular cancer, which is considered the most frequent type of cancer among young men, however, is only considered by 13 percent of men aged 18-34.

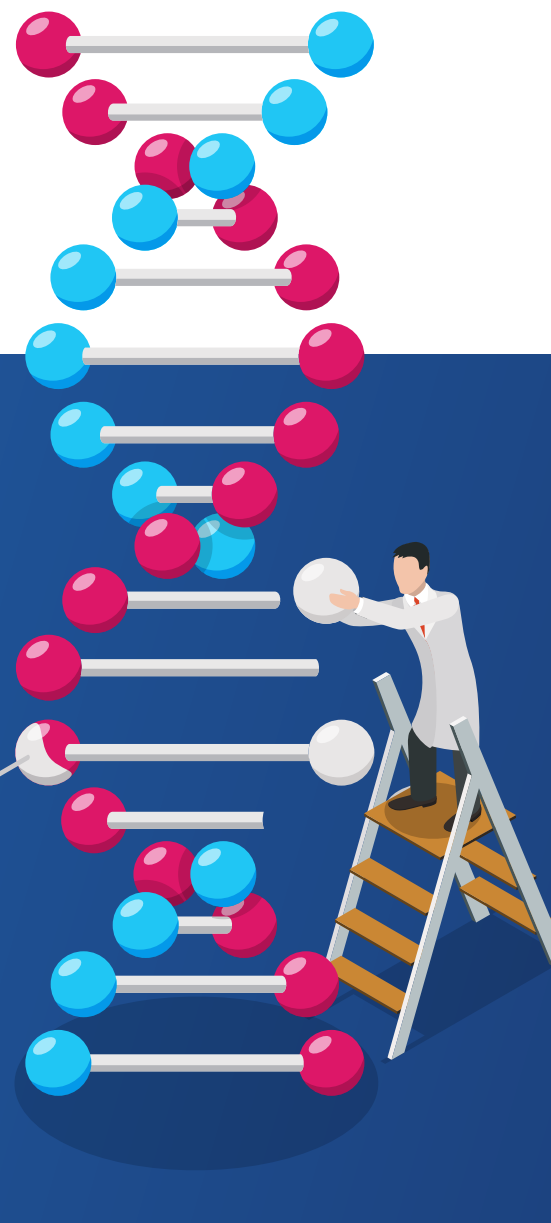
Lack of education and cost main barriers for prevention

The weighting of motivations to take check-ups seriously varies significantly between countries. The conviction that preventive health screenings are important and therefore

useful is reason enough for 62 percent of Europeans to get screened. Personal experience, i.e. having had a health issue detected by a screening in the past, drives 1 in 3 Europeans (35) to their doctor. Personal experience is particularly important for people in the Czech Republic (68), Poland (57) and Uzbekistan (56). And finally, a recommendation from a healthcare professional (HCP), which convinces 27 percent of Europeans. In countries such as France, Portugal and the UK (39 each), explicit recommendations from HCPs play a crucial role.

Looking more closely at the 42 percent who say they do not attend any type of screening, lack of education or knowledge and cost appear to be the main barriers to increased levels of prevention. One in three Europeans (32) admit that they do not know which check-ups they should or can have, depending on their age, gender, insurance status and public healthcare model. This is particularly true in the Czech Republic (40), Portugal (38) and Spain (36). Cost is also an issue for 1 in 4 Europeans (23) – in Romania (42) and Serbia (38), healthcare bills are the main reason people do not attend preventive screenings. A further 22 percent think screenings are unnecessary, and 16 percent struggle to make time for them. The fear of getting a bad diagnosis keeps 13 percent from attending, and the same number feel uncomfortable with preventive check-ups.

For a variety of reasons, it seems that a significant proportion of Europeans need a lot of convincing to adopt well-established means of detecting disease – could they be more open to more new-age procedures?



81%

OF EUROPEANS CONSIDER GENETIC TESTING TO PREDICT FUTURE HEALTH ISSUES.

8 in 10 would consider genetic testing to predict future health issues

Genetics can play a crucial role in determining a person’s predisposition to certain types of disease. Genetic testing can predict an individual’s risk of certain diseases years before they might develop. At 81 percent, the vast majority of Europeans could imagine taking such a test, while 14 percent would be uncomfortable with the idea of having their genes tested. The main argument of those opposing such tests is preferring to remain in the dark about potential health risks or diseases they might face in the future (12). This reasoning is particularly strong in Switzerland and the Netherlands (21), which are the countries least likely to consider genetic testing overall (70 and 72 respectively). On the other hand, Portugal (94), Poland (89), Romania and Spain (87 each) are very open to genetic testing as a means of detecting diseases such as cancer, possibly long before they manifest themselves.

Cancer most feared disease in Europe

Europeans seem to be generally aware that taking steps such as eating a healthy diet and exercising regularly can have preventive benefits for their health, which in turn might reduce their risk of contracting a serious disease. The most feared health condition among Europeans is cancer. 43 percent rank it first, and 75 percent in the top three diseases they are most afraid of. Fear of cancer is particularly high in Spain (50), Kazakhstan, Italy and the Czech Republic (48 each). Interestingly, the fear of cancer decreases with age: between 18 and 34 years, 48 percent cite cancer as their most feared disease, compared to 46 percent between 35 and 54 years, and 37 percent for those over 55. Women (47) are significantly more worried about cancer than men (39).

Fewer than one in five Europeans (18) cite heart attacks as their top fear, despite the fact that they are responsible for one in six deaths worldwide – closely followed by strokes, which 15 percent fear the most. Conditions that tend to be associated with an older age of onset, such as dementia, Alzheimer’s and Parkinson’s disease, rank much lower on the fear scale, even though symptoms can begin at almost any age. In Spain (16), France (14) and Italy (13), people are most afraid of Alzheimer’s compared to the European average (9).

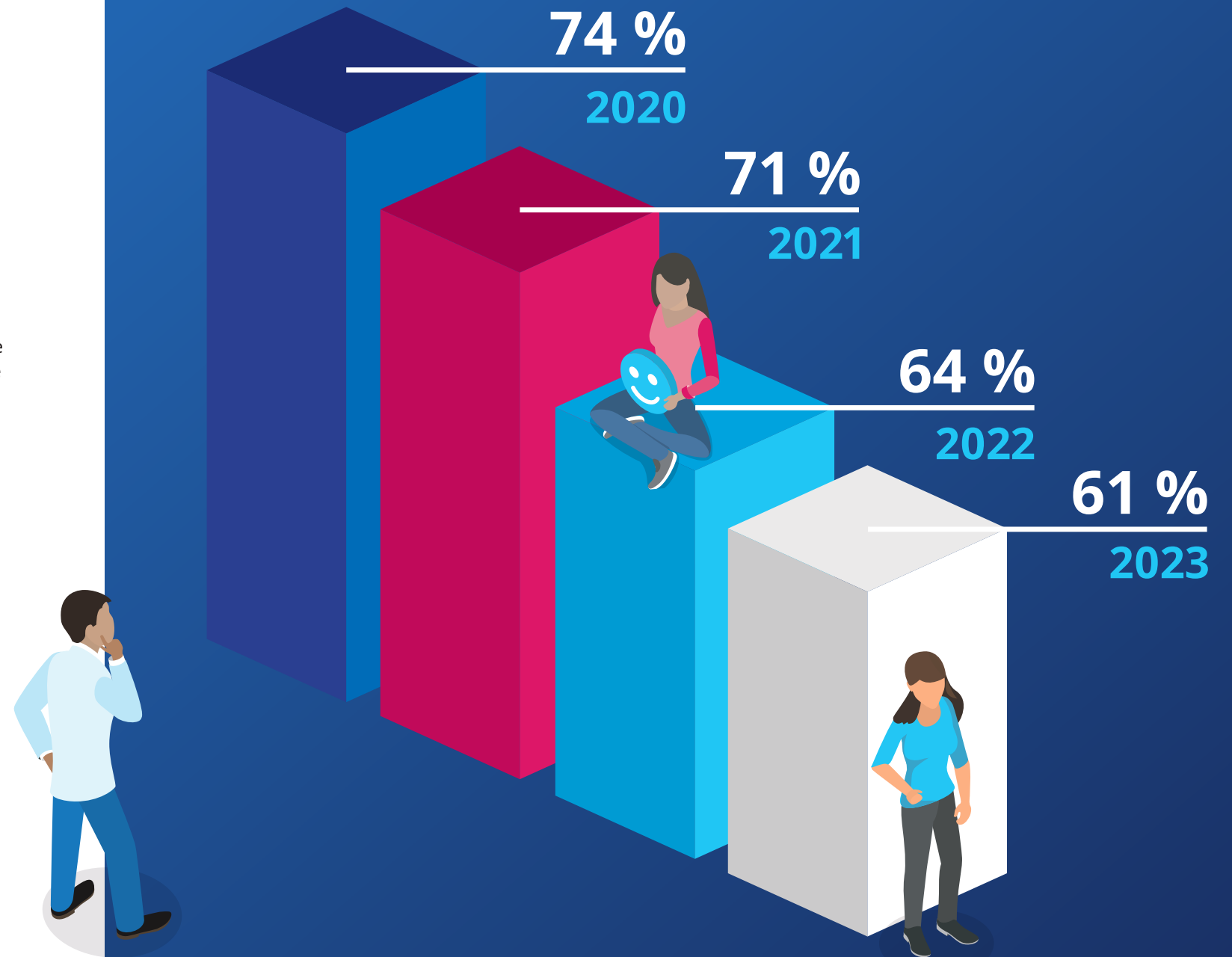
Downward trend in overall satisfaction with healthcare systems continues

Today, 61 percent of Europeans are generally satisfied with the healthcare system in their country. In 2022, the average was 64 percent, compared to 71 percent in 2021 and 74 percent in 2020. This is the third consecutive year of decline in overall satisfaction with healthcare systems in Europe – a trend that needs to be further explored and addressed. Not only to improve care, but also to motivate Europeans to take more control of their health, as those who are satisfied with their healthcare system are much more likely to make use of preventive healthcare.

Looking at individual countries, Belgium (85), Switzerland (77) and the Netherlands (76) remain frontrunners in terms of satisfaction with little or no fluctuation. Looking at the lower end of the spectrum, there have been some changes: in 9th place overall, the UK (67) has lost 8 percentage points compared to 2022, and Portugal (53) and Italy (51) have both dropped by 11 percentage points. First-time participant Uzbekistan registers a 65 percent satisfaction rate. Despite bringing up the rear, the only countries with improved ratings are Romania (39 percent, +8 points vs 2022), Kazakhstan (38 percent, +13 points vs 2022) and Serbia (34 percent, +3 points vs 2022). In Poland, just about 1 in 3 (32) are satisfied with the national healthcare system – down 3 points from 2022. ■

»» 43 % OF EUROPEANS RANK CANCER AS THE MOST FEARED HEALTH CONDITION. ««

TREND IN DECLINING PERCENTAGE OF EUROPEANS GENERALLY SATISFIED WITH THE HEALTHCARE SYSTEM IN THEIR COUNTRY CONTINUES:





■ **Is inflation costing Europeans their health?**

War, inflation, dissatisfaction with healthcare systems – this past year has been another turbulent one for the books. How have Europeans changed their daily lives to cope? Have they been forced to cut back on health spending as the cost of living has risen? Are Europeans worried about the availability of medicines? And how has their mental health fared amid all this?

Economic conditions force 58 percent to cut health spending

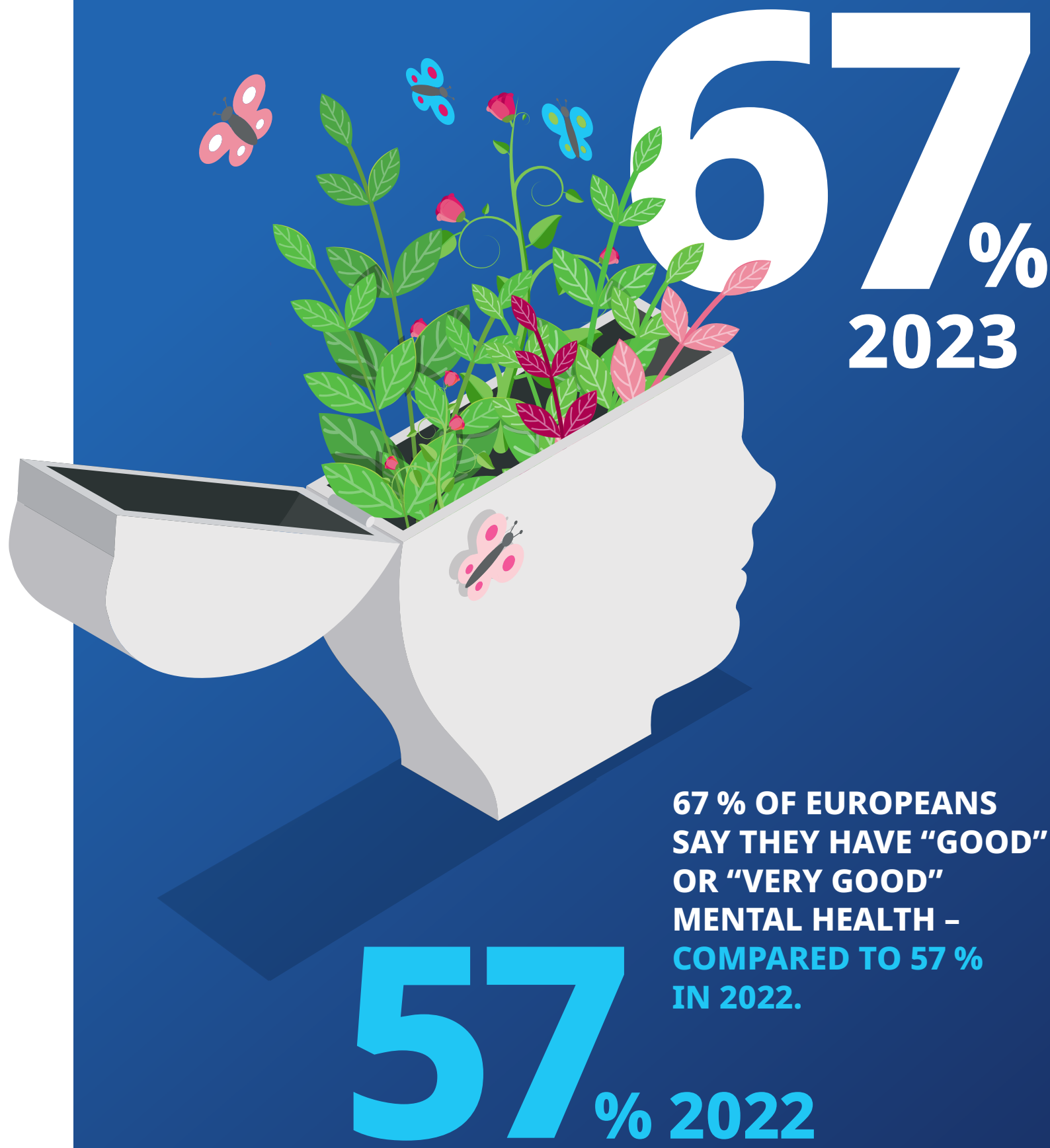
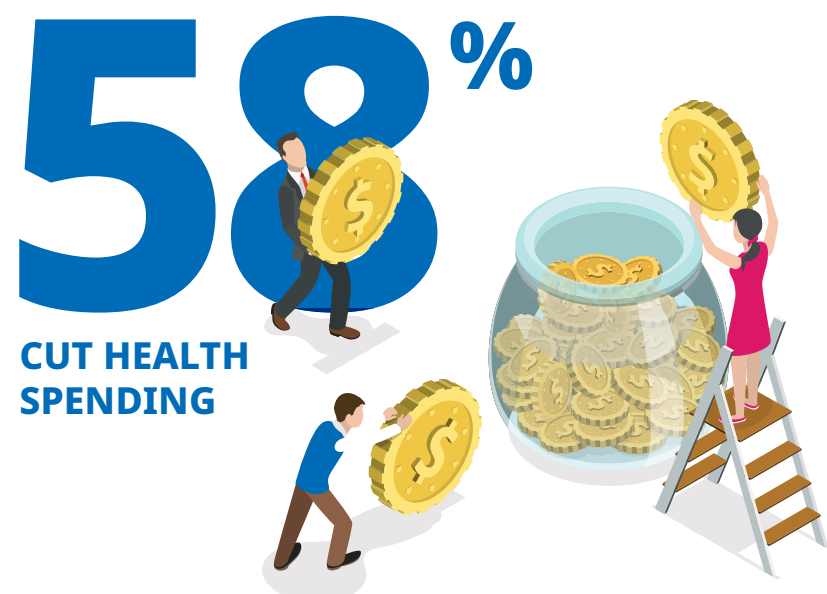
With 1 in 2 Europeans worried about their personal financial situation and 38 percent expecting the economic crisis to have a further impact, they have had to cut back on certain expenses – including those related to their health. One in three Europeans (34) explain they have reduced spending on wellness treatments such as massages or acupuncture to accommodate a tighter budget. While these may be considered non-essential by some, it is more worrying that Europeans have significantly reduced spending on exercise and fresh food (25 each), as these are essential preventive measures in everyday life. When it comes to fresh food, people in the Czech Republic (36), France (37) and Germany (33) have made the biggest concessions. 1 in 5 (19) say they are

now using less of their budget for vitamins and mineral supplements (VMS), and 15 percent have spent less on medication. The Czech Republic (71), Romania (67) and Serbia (66) are among those who have cut their health spending more drastically. At the same time, 42 percent of Europeans say they have not made any cutbacks – this mainly applies to Uzbekistan, where 57 percent say their expenses have remained identical, along with 55 percent in the Netherlands, 51 percent in the UK, 49 percent in Switzerland and 48 percent in Germany.

Concerns about medicine supply shortages divide Europe

Opinions vary widely between countries on concerns about the availability of medicines. Overall, 39 percent consider the situation to be “critical”, 48 percent as “uncritical”, 12 percent are “unsure”. The most concerned countries are Portugal (56 percent), the Czech Republic (53) and Germany (50). The UK (32), Serbia (27) and Kazakhstan (24) are significantly less concerned.

Looking more closely at whether negative perception of availability is based on actual experience, it becomes obvious that 1 in 4 (24) express fear of not being able to obtain medicine in the future, but only 18 percent have actually been unable to get the medicine they need or know of someone who has been unable to get the medication they need.



Mental health improves across the board

Despite all the bad news, there is reason to celebrate: in comparison to 2022, the quality of mental health has improved by a total of 10 percentage points across the continent. Today, 67 percent of Europeans rate their mental health as “good” or “very good”, 23 percent describe theirs as “fair” and less than 1 in 10 as “poor”. Among men, 73 percent describe their mental health as good, compared to 62 percent of women. Mental health also appears to improve with age and is significantly higher among those who are financially comfortable (73) than those who are struggling with money (56). Compared to other people, 66 percent of Europeans think their mental health is better, 1 in 5 (19) consider theirs worse and 15 percent are unsure.

Romania (86) and Serbia (80) are the trailblazers of good mental health in Europe – both have improved significantly in comparison to 2022 (Romania +15 percentage points, Serbia +22 percentage points). None of the participating countries recorded a decline in mental health over the past 12 months, although the

Netherlands and the UK both saw a very small increase of one percentage point. The lowest mental health ratings are found in Poland, the Czech Republic and the UK, where only 57 percent rate their mental health as “good”. In addition to a low overall rating, almost 1 in 5 (19) people in the UK explicitly describe their mental health as “poor”.

Sleep quality on the rise despite crises

Along with overall mental health, quality of sleep is on the rise as well – 7 in 10 now say that they get a good night’s rest. This compares to 65 percent in 2022. Almost all participating countries have benefited from this trend, with Kazakhstan and Serbia recording the most significant increase in sleep quality (KAZ 87 percent, +10 pts vs 2022; SER 77 percent, +8 pts vs 2022).

In Uzbekistan, people also seem to enjoy excellent quality sleep (87). In Switzerland (66 percent, -6 pts vs 2022), Poland (64 percent, -3 pts vs 2022) and Portugal (64 percent, -1 pt vs 2022), quality of sleep has remained mostly stable. As with their mental health, people in the UK also report the lowest sleep quality (59). However, there is no immediate indication that poor mental health necessarily

stipulates poor quality of sleep, as Poland and the Czech Republic, although low in terms of mental health, have just below average or even above-average sleep quality.

There is a very clear correlation between financial worries and sleep quality: those who describe themselves as “financially comfortable” sleep significantly better (74) than people who struggle financially (61).

Though the majority of Europeans sleep well, possible consequences of lack of sleep tend to be underestimated: 46 percent do not know that too little rest can cause increased levels of anxiety, lead to depression (46) or even elevate risks of cardiovascular disorder (78).

Fear for loved ones outweighs financial and geopolitical conflicts

When asked specifically about their most pressing worries, most Europeans cite the idea of losing family members or friends as their top concern (60). Health issues come second (53 percent), followed by personal financial issues (50). Almost 1 in 2 (45) are worried about wars and geopolitical conflicts. This fear is particularly strong in Poland (65) and Romania (56), both of which share a border with Ukraine, but Germans are also rather concerned (58). At a macroeconomic level, 38 percent of Europeans are worried about the economic crisis as a whole. About 1 in 3 (30) feel anxious about supply shortages in the healthcare system and environmental issues. The possibility of unemployment keeps 26

» 60 % OF EUROPEANS ARE SCARED OF LOSING FAMILY MEMBERS OR FRIENDS. «

percent awake at night. Overall, the Portuguese are the most anxious, with above-average scores for most scenarios, while people in Uzbekistan are the least worried – in fact, they are over three times as likely to not be worried at all (21 vs 6 European average).

Women tend to worry more than men – especially about losing a loved one, personal finances (+9 percent each vs men), as well as health issues (+7 percent). Europeans with poor mental health are more concerned about finances (+22 percent vs people with good mental health), losing their job (+12 percent) and their own health (+10 percent).

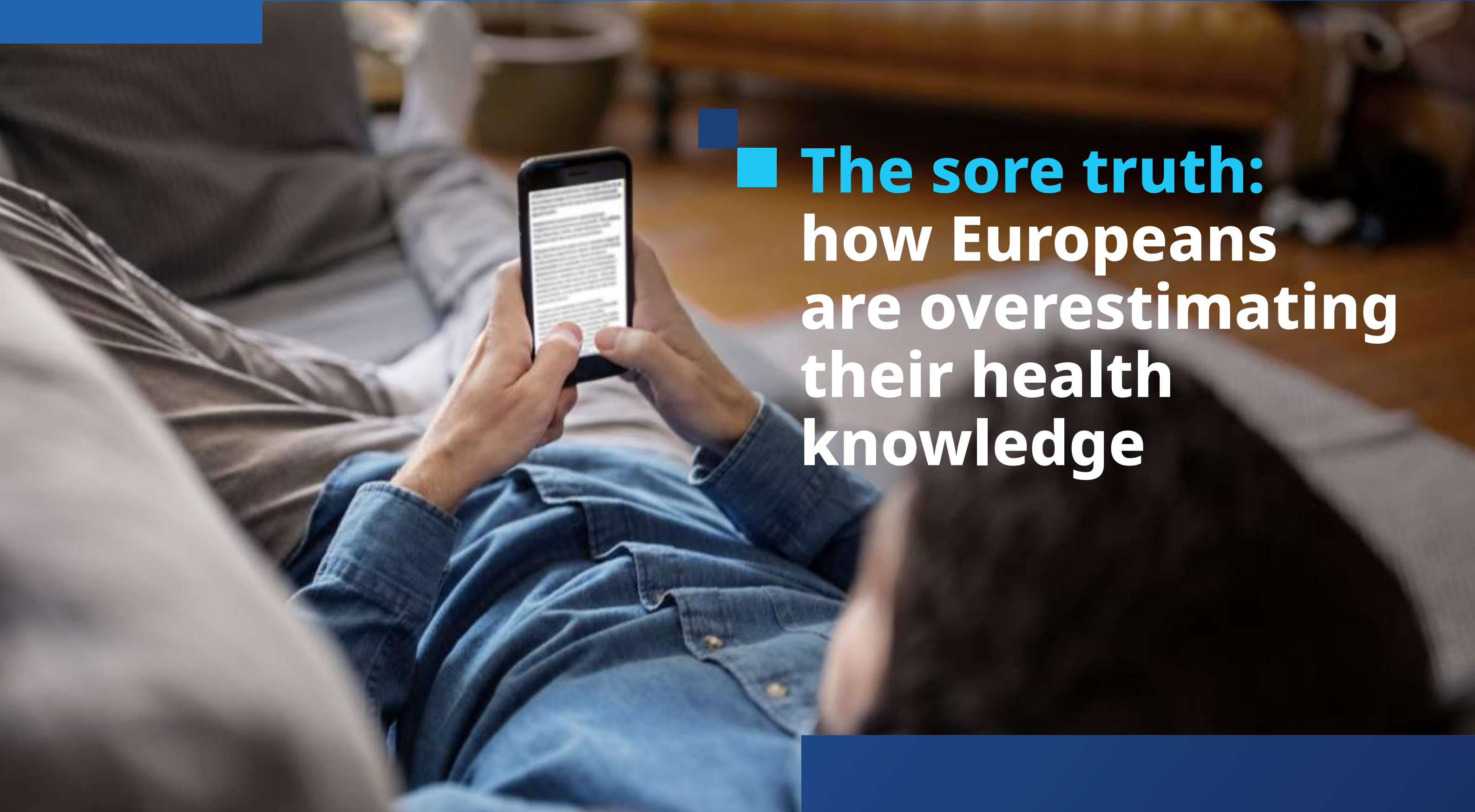
With all that is weighing on their minds, who do Europeans confide in about their sorrows? Friends or family (49) and their partner (47) are the first port of call for the majority of Europeans. GPs follow in third place (13). Less than 1 in 10 (9) say they talk to a mental health professional about their worries. One fifth of Europeans (22) keep things bottled up and do not talk with anyone about what is bothering them – a considerable increase from just 12 percent in 2022.

Despite all challenges, the majority of Europeans are optimistic about the future of their mental health: 62 percent are convinced it will remain stable, and over 1 in 4 (27) reckon it might even increase compared to today. Among young Europeans between the ages of 18 and 34, almost half feel their mental health will improve over time (47) – among 34-54-year olds, the figure is just over 1 in 4 (27), and only 11 percent of those aged 55 and over expect their mental health to change for the better. ■

FOR
53%
OF EUROPEANS, HEALTH ISSUES ARE THEIR MOST PRESSING WORRIES.



QUALITY OF SLEEP IS ON THE RISE:
70%
SAY THEY GET A GOOD NIGHT'S REST.



■ **The sore truth:
how Europeans
are overestimating
their health
knowledge**

88%

OF EUROPEANS BELIEVE THEY HAVE GOOD HEALTH KNOWLEDGE.

WOMEN APPEAR TO BE MORE CONFIDENT.



91%
OF ALL WOMEN

86%
OF ALL MEN

Increasingly eroding trust in healthcare systems, a considerable gap in health prevention, Covid legacies and cutbacks on health-related spending due to inflation: the overall outlook for the future of health in Europe is not too rosy. With the current state of affairs, do Europeans at least have a sufficient level of health knowledge to fall back on? Or do they perhaps think they know more than they actually do?

89 percent believe they have good health knowledge

Health literacy is a crucial cornerstone of prevention: if people are unaware of what is considered “normal”, then how would they know when to consult a professional and seek help? Generally, 1 in 4 Europeans say they are “very knowledgeable” when it comes to health topics, 63 percent would attest themselves mediocre knowledge and 12 percent confess they do not know very much about it. Among the most confident in their abilities are Serbia, where 37 percent think they have very good health knowledge, the Netherlands (30) and Romania (29). On the other end of the spectrum, France (18) and Kazakhstan (16) have the biggest share of people who consider their health knowledge sub-par.

Across Europe, 63 percent take an active interest in healthcare topics, either because they like to keep up to date on the latest developments or because they think such information is relevant to their everyday lives. The remaining 38 percent either do not feel the need to be in the loop at all times (30) or find health-related information generally irrelevant (8). Portugal (91), Italy (86) and Spain (84) are Europe’s top performers when it comes to staying informed.

25%

OF EUROPEANS ARE FREQUENT USERS OF PAINKILLERS.

Dangerous half-knowledge about painkillers

Self-medication with painkillers allows us to take on everyday life while keeping minor aches and pains at bay. In most instances, they are very easily accessible and can even be bought at supermarket checkouts in some European countries. Still, they quite literally should not be taken lightly. 1 in 4 Europeans are frequent users of painkillers, with 18 percent taking them weekly, and 7 percent even reach for them on a daily basis. In the UK, painkillers are used most often with 35 percent of the population relying on them at least weekly, followed by Poland (33) and the Netherlands (32). The most common ailments for which people use painkillers are headaches (63), toothaches (41) and back pain (32).



A significant, and frankly, dangerous blind spot about painkillers concerns Acetylsalicylic acid (ASS), an ingredient often used to treat headaches, for example: almost 1 in 2 Europeans (47) are unaware of its blood-thinning properties. 42 percent also falsely believe paracetamol to have anti-inflammatory attributes. The majority however correctly identify it as fever-reducing (80), and know of ibuprofen's anti-inflammatory (67) and fever-reducing (61) qualities. Speaking of fever: only 37 percent of Europeans know that the lowest temperature classified as fever in adults is 38° Celsius – 45 percent guessed 37.5°C and below, 18 percent 38.5°C and up.

Increased point-of-sale education could be a valid approach to increasing awareness of the correct scopes of application of different types of painkillers, thus empowering Europeans to pick the correct one for their individual purpose. The local pharmacy is the number one place to purchase painkillers (64), followed by drug stores (34) and online pharmacies (13).

Good awareness of average baseline pulse

With close to 9 in 10 Europeans considering their health knowledge respectable, they should probably be aware of the correct average resting pulse in healthy adults? A high "baseline" or resting pulse can be a symptom of cardiovascular disease, the world's number one cause of death. Fortunately, 75 percent of Europeans correctly identify 60-80 beats per minute (bpm) as the average resting pulse. The remaining respondents either suspect an elevated rate of 100-120 bpm (9) or even 140-160 bpm (1), or a dangerously low 20-40 bpm (3) as average baselines, 13 percent say they do not have any idea. Serbians (90) are most likely to pick the correct answer, while people in the UK need to brush up on their knowledge (67). Men, who are more likely to suffer from coronary heart disease than women, are slightly more successful at identifying the correct answer (78 vs 73). Unsurprisingly, as the importance and frequency of blood pressure measuring increases with age, so does awareness of the average resting pulse.

Perceived impact of pandemic on immune system especially high among European youth

With mental health and sleep quality on the rise after the pandemic, what are tangible long-term effects for the general population? 1 in 4 Europeans (23) have an answer to that – compared to pre-pandemic times, they now feel more susceptible to colds. Approval ratings among 18-34-year-olds are even higher: a third (32) of the European youth believe they now fall ill more easily. At the same time, 12 percent think their feeling more susceptible to colds has nothing to do with the pandemic, and 62 percent of Europeans say that they have not noticed any changes and have colds just as often.

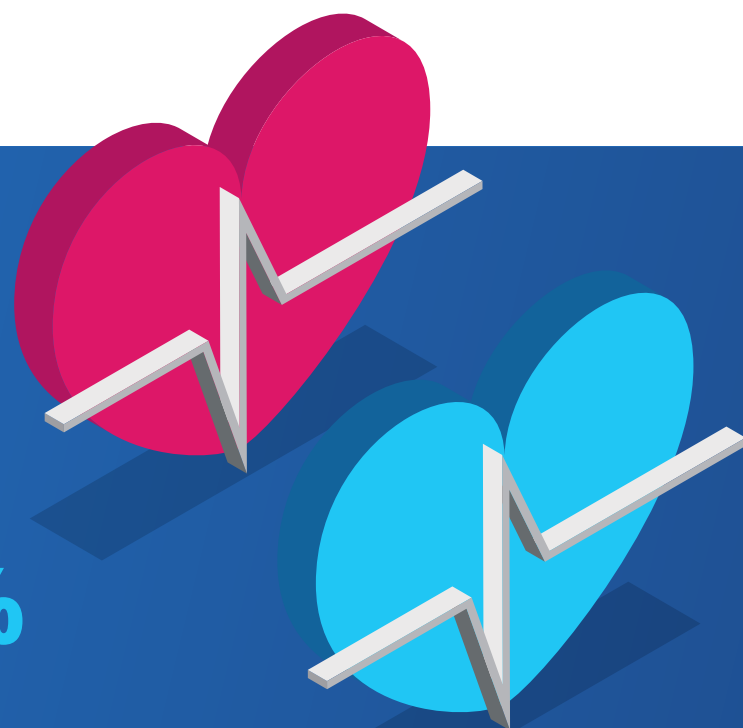
41 percent of Europeans try to ward off an infection when their partner is sick by avoiding physical intimacy. For 1 in 3 (30), kissing remains on the table regardless, and an additional 29 percent would not want to forego intercourse because of a cold.

People in the Netherlands and Austria (67) as well as Switzerland (66) are most likely to be intimate with a sick partner, compared to only 48 percent in the UK. Across borders, men are more likely to pursue intimacy (63) in spite of illness than women (55), and people between the ages of 18 and 34 (31) care less about possibly catching their partner's cold than middle-aged (40) and older people (50). ■



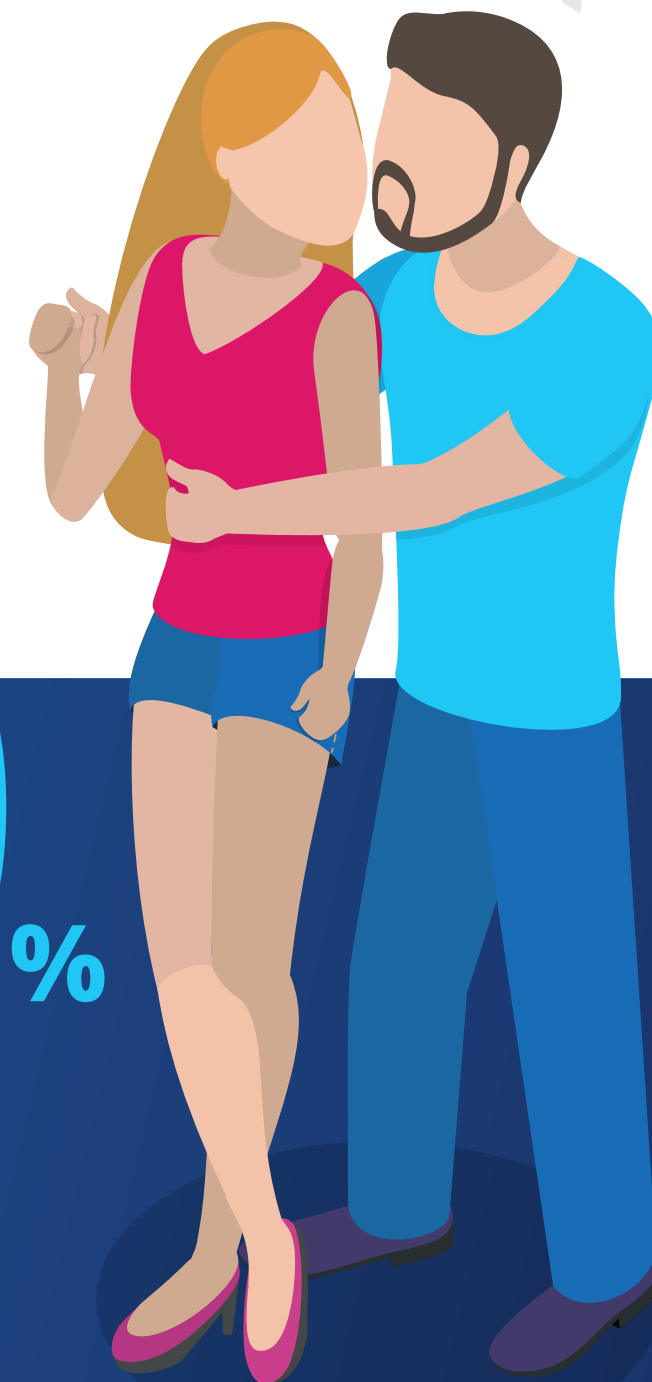
75%

OF EUROPEANS CORRECTLY IDENTIFY 60-80 BPM AS THE AVERAGE RESTING PULSE.



30%

OF EUROPEANS DO NOT REFRAIN FROM KISSING THEIR PARTNER DESPITE A COLD.



PHARMACIES AROUND EUROPE:

CLOSE TO 1 IN 2 EUROPEANS USE ELECTRONIC PRESCRIPTIONS



Although one might think that countries with a greater interest in health issues would automatically be more open to innovations in medicine, a closer look reveals a more nuanced picture. The Czech Republic for instance is one of the countries where most people are already avid users of electronic prescriptions with 76 percent of the population relying on them (European average 45), and Kazakhstan scores above-average rates for online bookings of doctor's appointments (52 vs 43 European average). Overall, electronic prescriptions and arranging to see a doctor online are among the least polarising healthcare services, with close to half of the European population already using them and only 19 and 17 percent respectively refusing

to adopt them. Consultations via webcam are considerably less popular – or not yet established. Currently, only 8 percent consult with their doctor online and an additional 43 percent could imagine making the switch in the future. 49 percent of Europeans cannot yet make use of such a service or are categorically opposed to it. In 2022 even 64 percent were willing to seek digital advice from a doctor. ■



SLIGHT INCREASE IN PHARMACY VISITS DESPITE CUTBACKS

With restrained readiness to cut back on costs for medicines and 1 in 5 (19) explaining they have taken more medication over the last 12 months, the frequency with which Europeans visit their pharmacy or parapharmacy has increased by 3 percentage points compared to 2022. Almost 6 in 10 (59) now say they go there at least once a month. The largest increases were recorded in Austria (+7 pts vs 2022), Belgium (+6 pts vs 2022), Poland, Kazakhstan and Serbia (+5 pts each vs 2022), the latter of which has the highest number of pharmacy visits of all the countries surveyed (79). In Spain (72) and the UK (47), the frequency of visits has remained constant. ■



61 PERCENT OF EUROPEANS WILLING TO PAY FOR ADVICE ON "TABOO TOPICS" AT PHARMACIES

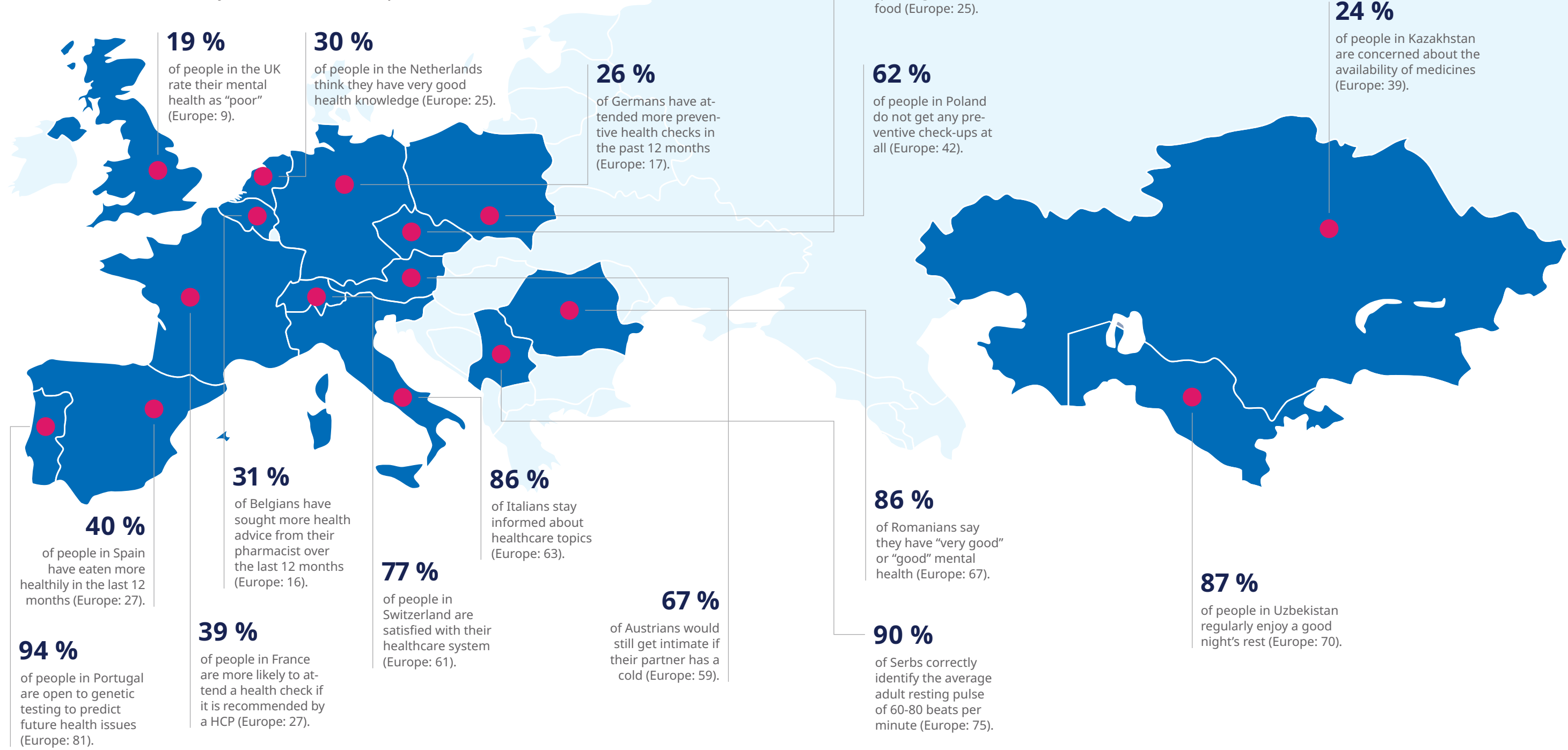
The services Europeans value at their pharmacy have not changed much compared to 2022. The most significant increase is in "payment by card" – an item that was by far the most important must-have in 2022, at 57 percent. Today, 64 percent of Europeans see cashless payments as the number one non-negotiable. Romania (74), Spain (72) and Italy (69) are most likely to expect this from their pharmacy or parapharmacy. The possibility to obtain selected standard prescription medicines directly from their pharmacist has also gained traction, with more than 1 in 3 (36) in favour, particularly in Serbia (65), Romania (47) and Portugal (45). The demand for home delivery by courier has grown slightly from 26 to 29 percent overall, with the Netherlands being particularly interested (40). Online orders remain a must-have for 1 in 3 (34), same as health check-ups and measurements (27) and being able to order via an app (25). Despite

their increased visits to pharmacies, demand for individual counselling on health-related topics has decreased from 35 to 26 percent, although 37 percent of people in France would consider such a service essential. They are also the main advocates of vaccinations in pharmacies (52 vs 24 European average). Looking at services that most pharmacies do not offer yet, but could potentially offer or charge for in the future, a significant share (42) could imagine paying to receive advice on discreet and taboo topics – an additional 19 percent would go further and consider this a must. 1 in 2 (48) would consider paying for cosmetics and skincare advice. Half of the European population would appreciate advice on nutrition (50) and vitamin status measurements (50). Overall, Romania, Spain, Italy and France are most open to charging for pharmacy services. ■



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