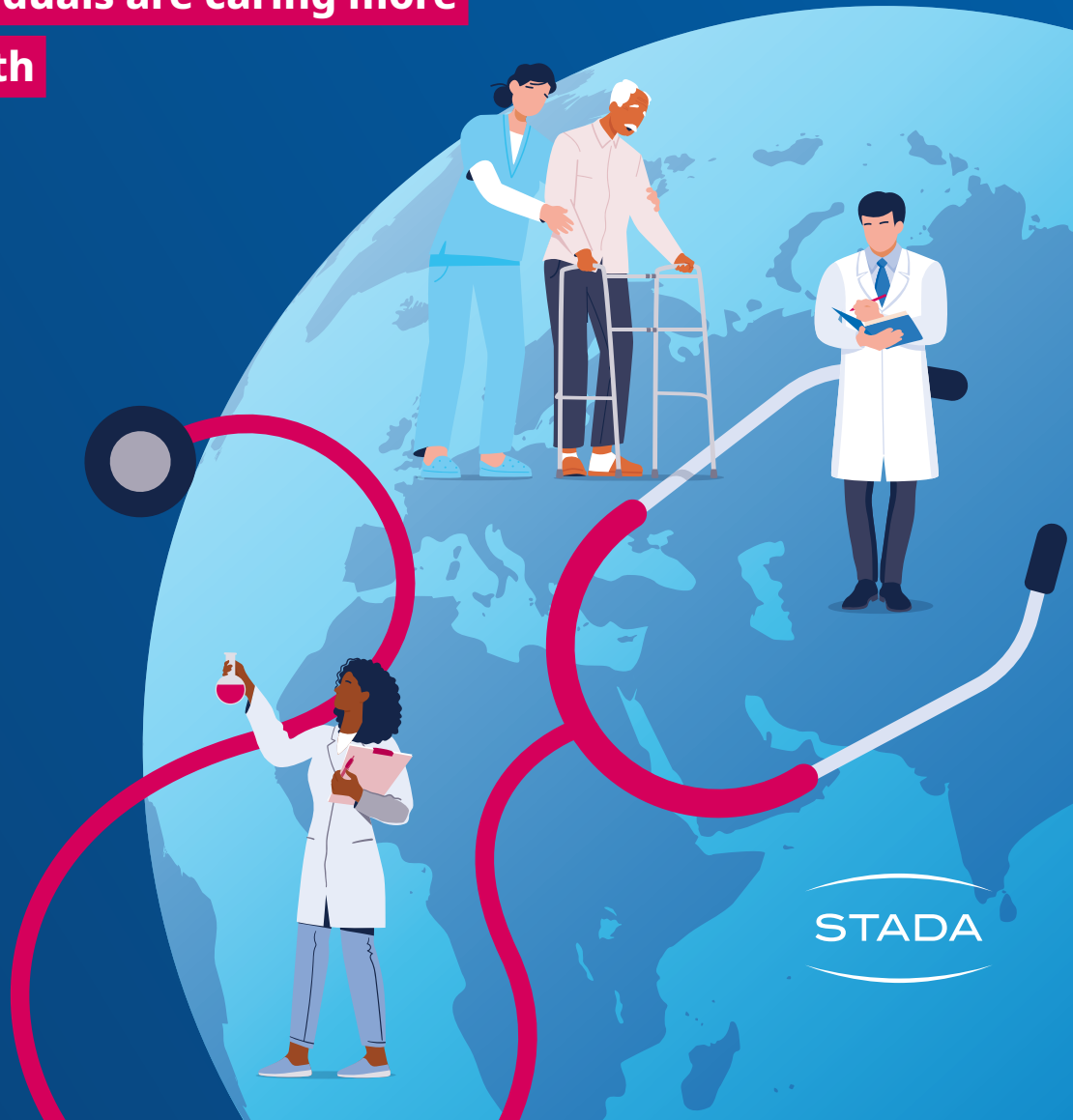


Satisfaction with health systems continues to decline

... while individuals are caring more for their health



46,000 interviews
in 23 countries

STADA

Europeans are taking action to care for their health

Receiving and listening to feedback is key for future progress, also in healthcare. Among the many insightful findings within the STADA Health Report 2024, one stands out as particularly profound: Europeans' satisfaction with their national healthcare systems is falling. Indeed, barely one in two Europeans is now happy with the level of service they receive, down from three in four satisfied citizens just five years ago.

The reasons for this decline are manifold and vary across the 23 countries covered by this year's STADA Health Report, a research survey which is unique in its scope and breadth. Common complaints among the 46,000 respondents include difficulties in obtaining appointments, inadequate care and a lack of trust in healthcare policy-makers.

However, there are positive signs as well. Trust in healthcare professionals remains strong. Their advice is highly valued amid the flood of often contradictory information available online and on social media.

What is clear from the scientifically validated data is that most people across Europe—regardless of their age, gender and background—are increasingly taking action to care for their own health; be that supplementing their diets, exercising more and the like. There is also a growing awareness that physical and mental well-being are equally important.

As CEO of a company dedicated to its purpose of Caring for People's Health as a Trusted Partner, I find this trend highly encouraging. I invite all stakeholders—the companies that develop, make and supply essential medicines; the policy-makers and regulators who set the frameworks for such products' use; the doctors who prescribe them; the nurses who administer them; the pharmacists who dispense them; and the patients who benefit from them—to join the debate around the many challenges, but also potential solutions, presented in the 10th edition of the STADA Health Report. Through open dialogue, based on empirical data, together, we build resilient health systems for the years to come.

Peter Goldschmidt
CEO STADA Arzneimittel AG

Through open dialogue, based on empirical data, we can together build resilient health systems for the years to come.





23 countries.
46,000 respondents.



STADA Health Report 2024

Origin, Objectives and Methodology

Our healthcare system has been repeatedly put to the test by the crises of recent years. It is, therefore, no surprise that Europeans' satisfaction with their healthcare system has declined, marked by long waiting times, overworked doctors and increasing bureaucracy.

A lack of prevention, one of the most important levers for the health of Europeans, prevails. Nevertheless, Europeans are willing to invest in their own health. Many are changing their lifestyles, exercising more and eating healthier.

Looking back

Originally launched in 2014 as a national study to examine the "health literacy" of the German population, the STADA Health Report has consistently grown and is now celebrating its 10-year anniversary. Over the past years, it has become the largest and most comprehensive international study in the industry, covering a wide range of health-related topics. Since its international launch in 2019, the report has examined the behaviour of the European population and their physical and mental health concerning current trends and events, highlighting developments and changes over time. Following STADA's Purpose of "Caring for People's Health as a Trusted Partner", this year's Health Report not only uncovers uncomfortable truths and pressing issues, but also explores possible causes and solutions.

Sample and methodology 2024

The 2024 international survey was conducted by Human8 via an online questionnaire in February and March 2024 in the following 23 countries: Austria, Belgium, Bulgaria, the Czech Republic, Denmark, Finland, France, Germany, Hungary, Ireland, Italy, Kazakhstan, the Netherlands, Poland, Portugal, Romania, Serbia, Slovakia, Spain, Sweden, Switzerland, the United Kingdom and Uzbekistan. The panel included a total of 46,033 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 satisfaction with national healthcare systems, trust in doctors and pharmacists, health prevention, mental health, and more.

The basic prerequisites for Europeans to take responsibility for their own health are in place, but sufficient support from the healthcare system is still missing. We wanted to know where problems arise in order to identify possible solutions: how do Europeans rate the current state of their healthcare systems? Does this correlate with their overall trust in conventional medicine? How much faith do they place in healthcare policy-makers, doctors and pharmacists? The answers to these questions and much more can be found in the STADA Health Report 2024.

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 21 participating European nations, have been subsumed under the term "European".

Health System & Conventional Medicine

Chapter One

2024

What is the state of healthcare systems in Europe?

With satisfaction at an all-time low, the European healthcare landscape is wrestling with a fundamental issue. Simultaneously, trust in conventional medicine is on the rise. Artificial intelligence could bring relief but is eyed with suspicion when applied to the world of personal healthcare. Healthcare professionals play a critical role in holding the system together.

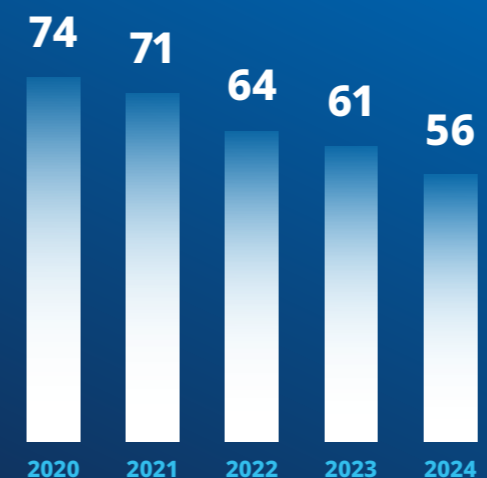
Health System & Conventional Medicine

Analysis



Satisfaction with healthcare system falls for the fourth year in a row—to an alarming low.

All data in %



A Bitter Pill to Swallow:

Europeans' Satisfaction With Healthcare Systems Continues to Decline

Amidst the stellar advancements of modern medicine and healthcare, and its resilience in the face of global health crises, resentment simmers beneath the surface. Frustration with access to healthcare appointments, the standard provided in healthcare institutions, staff shortages and a general mistrust of those making political decisions about health echoes across the European continent.

Never before in the 10-year history of the STADA Health Report have Europeans felt so let down by their healthcare systems. However, their pessimism is accompanied by a contrary trend: growing trust in conventional medicine. This is an interesting contradiction as much as a wake-up call. But it is also an expression of hope for the future of Europe's current healthcare landscape.

Lack of appointments, poor standards of care and distrust drive dissatisfaction

Overall, people in Hungary are the most dissatisfied with their healthcare system: 72 percent of them find it insufficient, followed by Kazakhstan (67) and Serbia (65). Across Europe, the main arguments for dissatisfaction are struggling to get an appointment in the first place (54), which seems to be particularly difficult in Hungary (73), and personally having or knowing someone who has received inadequate care (47), which was most often reported in Sweden (63). Additionally, almost 1 in 2 Europeans (46) say they have a general lack of trust in those responsible for health policy, which is most common in the Czech Republic (66). Other reasons for dissatisfaction with healthcare systems include a lack of sustainability (39), privatisation which negatively impacts healthcare services (30), no access to preventive services and lack of medical staff in hospitals (28 each). While 42 percent of Europeans could imagine paying for better-quality healthcare, especially in Uzbekistan (75), this is not a majority option, mainly because 1 in 3 Europeans say they could not afford to pay more for healthcare.

Healthcare professionals and availability of medicines reassure Europeans

Belgium (85), Switzerland (81) and the Netherlands (77) remain the most satisfied with their healthcare systems—mainly due to doctors or pharmacists giving good advice (56, all), and being able to obtain medicines when needed (64 Belgium, 63 Netherlands and Switzerland). Interestingly, good availability of medication is also the main reason for satisfaction with the German healthcare system (66 vs 56 European average) despite supply shortages for certain products, especially for children's medication. Other satisfaction drivers are

Since 2021, the STADA Health Report has logged a continuous decline in satisfaction with public healthcare systems in Europe—and the trend continues. In 2020, just before the pandemic broke out, overall satisfaction was at 74 percent, dropping to 71 percent in 2021. By 2022, it was as low as 64 percent, and fell to 61 percent in 2023. Today, as few as 56 percent of Europeans are satisfied with the healthcare system in their country. And while some first-time participants are bringing up the rear, average satisfaction among repeat participants has also decreased by an average of 3 percentage points compared to 2023. Satisfaction dropped most notably in the UK, forfeiting 11 percentage points, with discontentment likely fuelled by post-pandemic pressure on the National Health Service; Kazakhstan, where satisfaction dropped by 10 percent; and Germany, with a loss of 8 percent. In those three countries, difficulties to book appointments (69 and 68 in the UK and Germany, respectively) and the standard of care (Kazakhstan, 61) were cited as the main reasons for discontent.

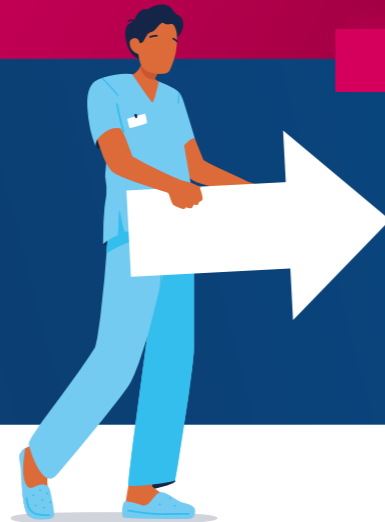


Health System & Conventional Medicine

Possible solutions

What can be done to improve healthcare systems in Europe?

Expertise and incentives are right at the top of Europeans' minds:



affordability of medication (43), which is rated especially high in Belgium (59), and good access to preventive health services (41), which is particularly valued by the Czech population (62). In the STADA Health Report 2023, the Czechs were also among the countries with the highest number of regular preventive healthcare visits.

A general observation: satisfaction with healthcare systems could be linked to regular self-care. People who regularly engage in self-care are more likely to be happy with the healthcare system (57) than those who reportedly do little to support their own health (47).

Expertise and incentives are widely called for across Europe

Beyond addressing the immediate causes of dissatisfaction mentioned above, Europeans have some broader ideas about what needs to be worked on to improve healthcare systems in the future. Almost 1 in 2 Europeans (48) believe it would make a difference if health policy-makers have a health-related background—a rather sensible suggestion, considering that a lack of trust in this group is a major driver for dissatisfaction. Increasing the wages of people working in medical professions is the second most popular measure, with 47

percent hoping this might motivate more people to pursue a career in healthcare. 43 percent also believe that increased production of medicines in their own country rather than relying on imported goods could help. More than 1 in 3 Europeans (35) would like to see the scope of their pharmacists' responsibilities expanded to free up doctors' capacities, and almost as many (31) would like to see alternative career paths to becoming a doctor offered to address shortages. On a similar note, 1 in 5 Europeans believe entry requirements for medical professions should be reduced to increase the number of people employed in the sector.

But, for all that Europeans are unhappy with healthcare systems, their trust in conventional healthcare is on the rise

Almost 7 in 10 Europeans (69) say they trust conventional medicine completely or mostly while educating themselves independently on the internet—an increase by 7 percentage points compared to 2022. Men (35) are more likely to have no reservations whatsoever against conventional medicine than women (25). Looking at individual countries, returning participant Finland (84) takes the lead in terms of trust, followed by Spain (82), which has always been among the fiercest proponents of conventional medicine.

Solution 2

47%

call for increased wages for people in medical professions

Solution 1

48%

think health policy-makers should have a health-related background



Solution 3

43%

would be put at ease if more medicines were produced in their own country

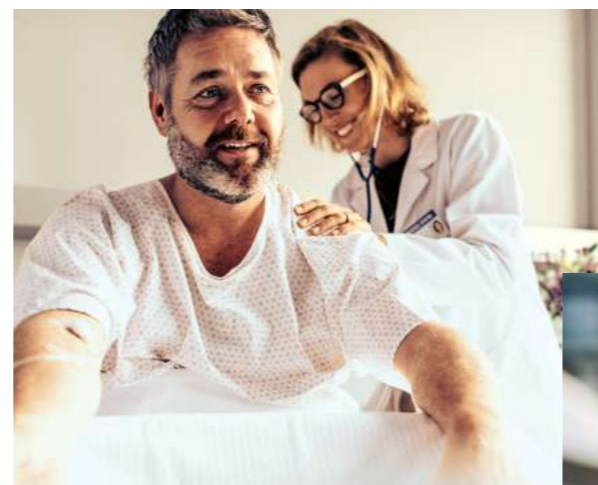
The main reasons for high levels of trust are health practitioners such as doctors and pharmacists: 48 percent expressly appreciate their advice, believing that healthcare professionals (HCPs) "know what's best". People in Belgium and Ireland hold their professionals' opinions in particularly high regard (56). An additional 42 percent say they trust conventional medicine because it has proven effective—especially in Finland (57), the United Kingdom (UK) and Ireland (51). Another 41 percent base their trust on the decades-long research that has led to many breakthroughs in conventional medicine, and 39 percent are put at ease by high quality standards, regulatory processes and controls.

It seems that trust in conventional medicine coincides with a higher likelihood of healthcare satisfaction: 59 percent of people who say they trust conventional medicine are satisfied with their healthcare system, compared to only 28 percent of those who have reservations against conventional medicine. But still, improving confidence alone is not enough to compensate for the ever-growing discontent with healthcare systems—system deficiencies seem to be the root of the problem, not medicine itself.



Meanwhile, scepticism prevails in some countries

People in Kazakhstan are most wary of conventional medicine (23). And Uzbekistan seems in two minds about the topic: it has the highest share of people saying they completely trust conventional medicine (56), as well as 22 percent who say the opposite. Across the continent, 44 percent are worried that people involved in conventional medicine are just trying to make money, and an equal share (43) are frustrated with conventional medicine's focus on symptom management rather than addressing root causes. This point of view is more prominent among women (46) than men (39). Just over 1 in 3 (35) think that the pandemic brought to light the limitations of conventional medicine, an opinion shared most often by people in Serbia (49) and Romania (48). 17 percent have been disappointed in advice received from a GP or prefer to use alternative treatments, the latter being especially popular in Switzerland (34). For 16 percent, negative press about conventional medicine has been off-putting, and 15 percent complain that conventional medicines are often unavailable or in short supply.

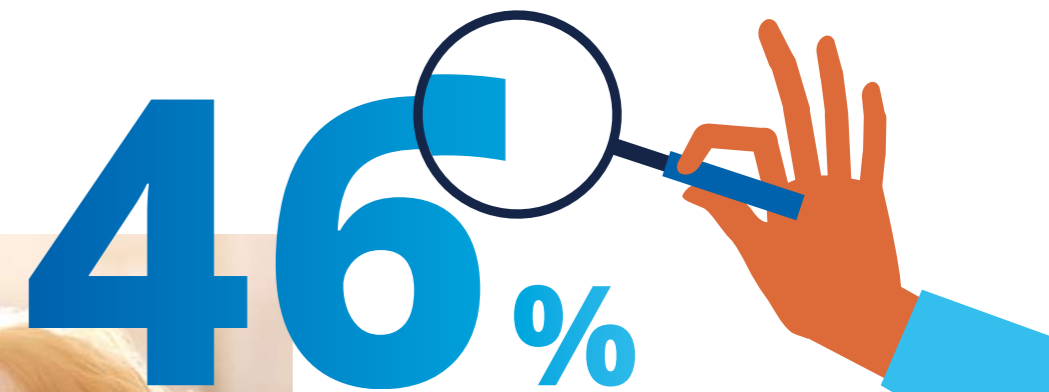


Trust in conventional medicine remains firm—but Europeans still see room for improvement

To further improve confidence, 46 percent of Europeans believe that conventional medicine should focus more strongly on the individual patient case and their demands—and this sentiment comes primarily from Spain and Finland, the strongest advocates (59). Improved communication between HCPs and patients during consultations would also help improve conventional medicine's overall reputation. In Portugal, more than half of the population would approve of clearer, more lay-person-friendly communication. In terms of performance, 41 percent of Europeans would like to see more breakthroughs in conventional medicine, especially in the treatment of serious diseases such as cancer, while 40 percent want to see a more holistic approach to medicine, taking into account both physical and mental health. To make conventional medicine even more accessible, 29 percent would like to see lists of doctors who specialise in treating specific diseases, easier access to appointments around work commitments (28), more comprehensive materials to help them learn about diseases and treatment options and more user-friendly medicines (25).

Amid eroding satisfaction: healthcare professionals serve as bastions of trust in medicine

Health professionals such as general practitioners (GPs) and pharmacists are also the most important sources of information when it comes to buying over-the-counter (OTC) medicines and dietary supplements. GPs are the most trustworthy sources for recommendations (63), closely



think conventional medicine should focus more strongly on the individual patient case



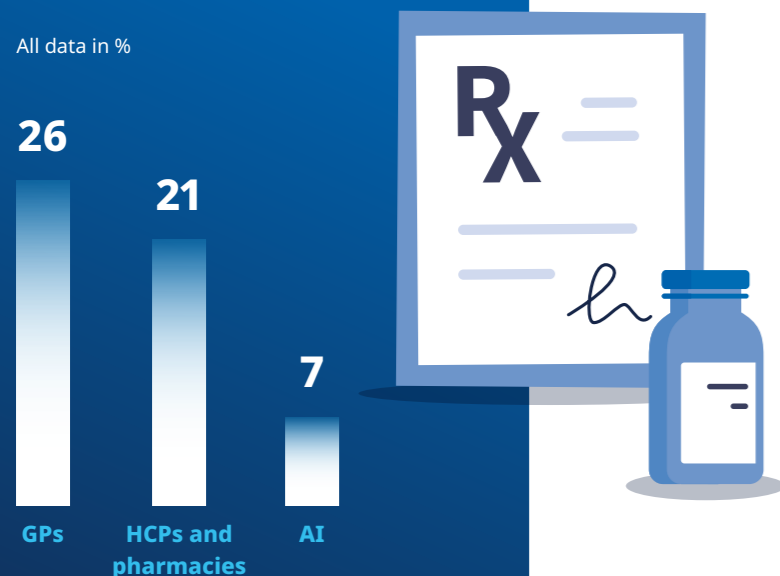
Thinking about the future of their brick-and-mortar pharmacies, 46 percent of Europeans would like to see more affordable treatment options and medication, especially in Finland (62) and the Czech Republic (61). Roughly 1 in 3 (32) would appreciate the opportunity to have their prescriptions or other medications delivered to their home, an idea that is particularly popular in Germany (42). An additional third (31) would like to see other health-related services like eye or hearing tests merged into pharmacy services, and 31 percent would appreciate more information on the specifics of their prescription or medication in terms of use or application.

Artificial intelligence: an open box

While the true extent to which AI will come to influence our lives—both online and offline—in the years to come is hard to gauge, most Europeans nevertheless take it for an overall positive tool. This not only goes for the 47 percent who say they have an understanding of what AI is, but also 15 percent of people who admit to not knowing too much about it but see it as a possible means to improve society. Despite AI's reshuffling of how easily accessible and customisable information can be nowadays, most Europeans still prefer a quick Google search (62), online articles (35 percent) or official websites from healthcare institutes (33) to procure health-related information. Regardless of its surge in popularity over the last few years, AI has not yet solidified a position as a source for health-related information (8). 14 percent say they do not use any online sources at all. >>

GPs and pharmacies are way ahead of AI when it comes to recommendations for healthcare issues.

All data in %



followed by pharmacists (54) and other healthcare professionals (49). In Ireland and Finland, especially, people are highly likely to trust their GPs and pharmacist's opinion (72/71 and 70/65, respectively). Looking at age groups, Europeans above the age of 55 are most likely to trust their GPs recommendation, while first-hand accounts from friends or family tend to sway 18 to 34-year-olds. And: GPs (26), pharmacists and other HCPs (21 each) are not only the most trustworthy but also most influential forces when consumers purchase medication. By comparison, recommendations stemming from AI (7), online-advertising (11), social media (12) or Google search results (11) are significantly less vital when deciding what mediation to purchase.

Hesitancy towards AI in health contexts could be indicative of wider scepticism

The use of AI in personal healthcare, whether this is for booking appointments, getting a diagnosis or keeping informed about recovery, makes the majority of Europeans feel uneasy—and women more so than men. An interesting take, especially since AI could potentially help practices become more efficient in scheduling appointments and giving diagnoses and treatment recommendations, which could benefit patients significantly.

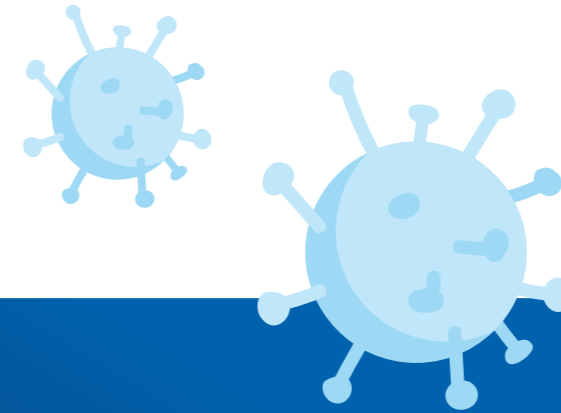
List of concerns regarding use of AI in healthcare is sizeable

64 percent of Europeans worry about possible misuse, especially in Uzbekistan (81), 57 percent have reservations about data security, mainly in Ireland and Kazakhstan (68 each). The possible loss of human interaction with AI entering the healthcare sector concerns 59 percent of Europeans, most notably in Ireland (72) and the UK (69), as well as prospective implications for people working in healthcare. 56 percent of Europeans worry that technology might replace human actors in the sector—and again, people in Ireland (71) and the UK (66) worry most about this. Informed consent and autonomy as well as the ability to refuse treatment could be at risk in the eyes of 42 percent. Europeans are also apprehensive about potential issues with biases in terms of cultural sensitivities (34) and a general loss of control (53). Remarkably, Uzbekistan harbours both the highest number of people concerned and unconcerned about possible ramifications of introducing AI into personal healthcare.



30%

of Europeans think it is likely that within the next ten years the majority of cancers will be non-fatal



compared to only

20%

believing scientists will find a cure for the common cold or flu



So, while AI will surely continue to be adopted across different fields of practice in healthcare, Europe's citizens are clear: this should be a complement to, and not a replacement for, personal interaction with qualified professionals. And any moves to use this emerging technology must be handled transparently to dispel concerns about security.

There are digital healthcare solutions Europeans can get on board with

Electronic prescriptions (59), most appreciated in the Czech Republic (78)—where they have been mandatory since 2018, and Finland (77)—which has also been using them for some time. Digitised patient records would be welcomed by 54 percent, as well as more virtual consultations with doctors or pharmacists (48)—which are in particular demand in Bulgaria (59) and Portugal (58), health apps on prescription (40) and electronic package leaflets (38).

Europeans share a rather optimistic outlook on the future of medicine, further fortifying their belief in conventional medicine

The most unifying opinion shared by 46 percent of Europeans: within the next ten years, we will have developed more vaccines against common diseases. Portugal, Spain, Finland and Sweden (57) are most optimistic about this prospect. In Hungary (53), Austria (51) and Germany (50), people believe that robots will pay an integral part in performing medical procedures like surgeries (41 European average). For better or worse, 38 percent see AI becoming a central tool in diagnosing most diseases—especially in Romania (46), where reservations against such technology are currently running high.

Other forecasts include the majority of cancers being non-fatal (30), consulting medical experts and doctors from around the world for a virtual diagnosis (29), growing replacement organs from cells taken from our own bodies (26) and taking individually created nutritional supplements tailored to individual needs (24).

Remarkably: Europeans deem all of the aforementioned scenarios more plausible than scientists finding a cure for the common cold or flu—only 1 in 5 Europeans consider this a likely reality.

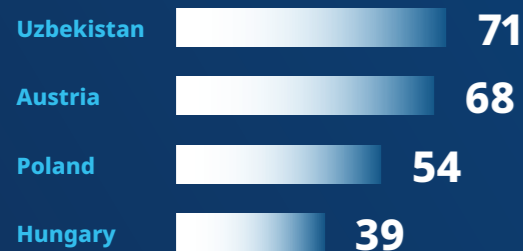
How are Europeans ...

physically?

54% 

of Europeans consider their physical health to be “good” or “very good”. There appears to be a link between physical and mental health, as 70 percent of Europeans who consider their mental health to be good also report good physical health. However, this correlation drops to just 17 percent among those who rate their mental health as poor.

In general, how good or bad is your physical health currently?



all graph data are in %
exemplary selection of country results



mentally?

65% 

of Europeans rate their mental well-being as “good” or “very good”. Men (69) rate their mental health significantly more positively than women (61).

Taking everything into account, how would you assess your own mental health?



systemically?

56% 

are satisfied with the healthcare system in their country. This is the lowest figure in five years. In 2020, it was 74 percent, and since then, the number has been steadily declining year by year.

Overall, how satisfied are you with the public healthcare system in your country?



Mental Health & Ageing

Chapter Two

2024

What is the state of Europe's mental health?

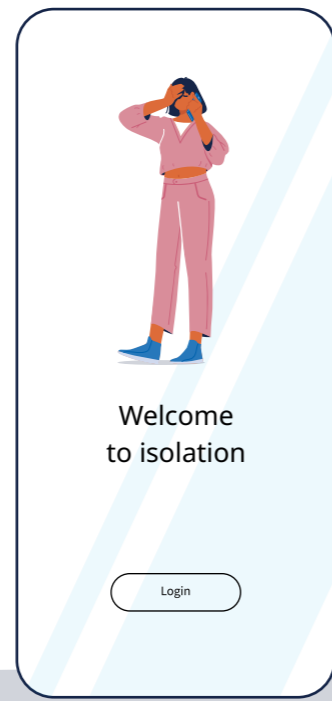
Despite being more connected than ever, the majority of Europeans are experiencing feelings of loneliness. And while members of the young generation report the highest levels of overall happiness, they are the ones struggling most amidst this loneliness epidemic. Perhaps not the best prerequisites for ageing, a prospect about which Europeans generally seem to be in two minds.

Mental Health & Ageing

Analysis

52%

of Europeans always, often or occasionally feel lonely



The Lost Generation:

The Price the Younger Generation Pays For Always Being Online

More connected than ever—but more alone? Amid our always-online culture, debates rage on the impact this 24-hour engagement has on both our mental and physical health. On the plus side: the STADA Health Report 2024 suggests Europeans' mental health is quite stable compared to data from previous years.

But on the negative side: an alarming trend is emerging—despite reporting higher levels of overall happiness than other groups, young Europeans are struggling significantly more with their mental health. The reasons are manifold—and only partly self-induced.

Two in three (67) Europeans describe themselves as “quite” or “very happy”; another one in four (26) are sitting somewhere in the middle, oscillating between “neither happy nor unhappy”, and 7 percent are (very) unhappy—on the surface, not too concerning. But while one might expect Scandinavian countries to come out on top as the happiest people in Europe, as recently presented by the data collected for the World Happiness Report 2024^[1], the STADA Health Report paints a different picture. While people in Finland (65), Denmark (67) and Sweden (63) report average or even slightly below-average levels of individual happiness, they are trumped by Uzbekistan (87), the Netherlands (80), Ireland (77), France (74), the UK and Switzerland (73 each). A common trend, however, echoes the throughout the findings from the STADA Health Report 2024: generally speaking, happiness decreases with age. Among 18 to 34-year-old Europeans, 72 percent are “quite” or “very happy”, compared to 67 percent of middle-aged Europeans and 65 percent of people above the age of 55.

But are subjective levels of happiness a prerequisite to good mental health? Does happiness make us well?

Decline in self-reported mental health of Europeans

While sound mental health ratings surged by 10 percentage points to 67 percent from 2022 to 2023, today 65 percent of Europeans rate their mental well-being as “good” or “very good”. Eastern European countries seem to have an ambivalent relationship with mental health: countries like Romania (85) and Bulgaria (80) report good mental health, while nations like Hungary (48) and the Czech Republic (53) report having comparatively poorer mental health. Men (69) rate their mental health significantly more positively than women (61). Looking at generational differences, Europeans above the age of 55 lead with 70 percent, followed by those between the ages of 35 and 54 (64) and young Europeans bringing up the rear (59). Evidently, there is more to good mental health than “just” happiness. >>



2 in 3

Europeans describe themselves as “quite” or “very happy”

[1] Helliwell, J. F., Layard, R., Sachs, J. D., De Neve, J.-E., Aknin, L. B., & Wang, S. (Eds.). (2024). World Happiness Report 2024. University of Oxford: Wellbeing Research Centre.

Mental Health & Ageing

Possible solutions

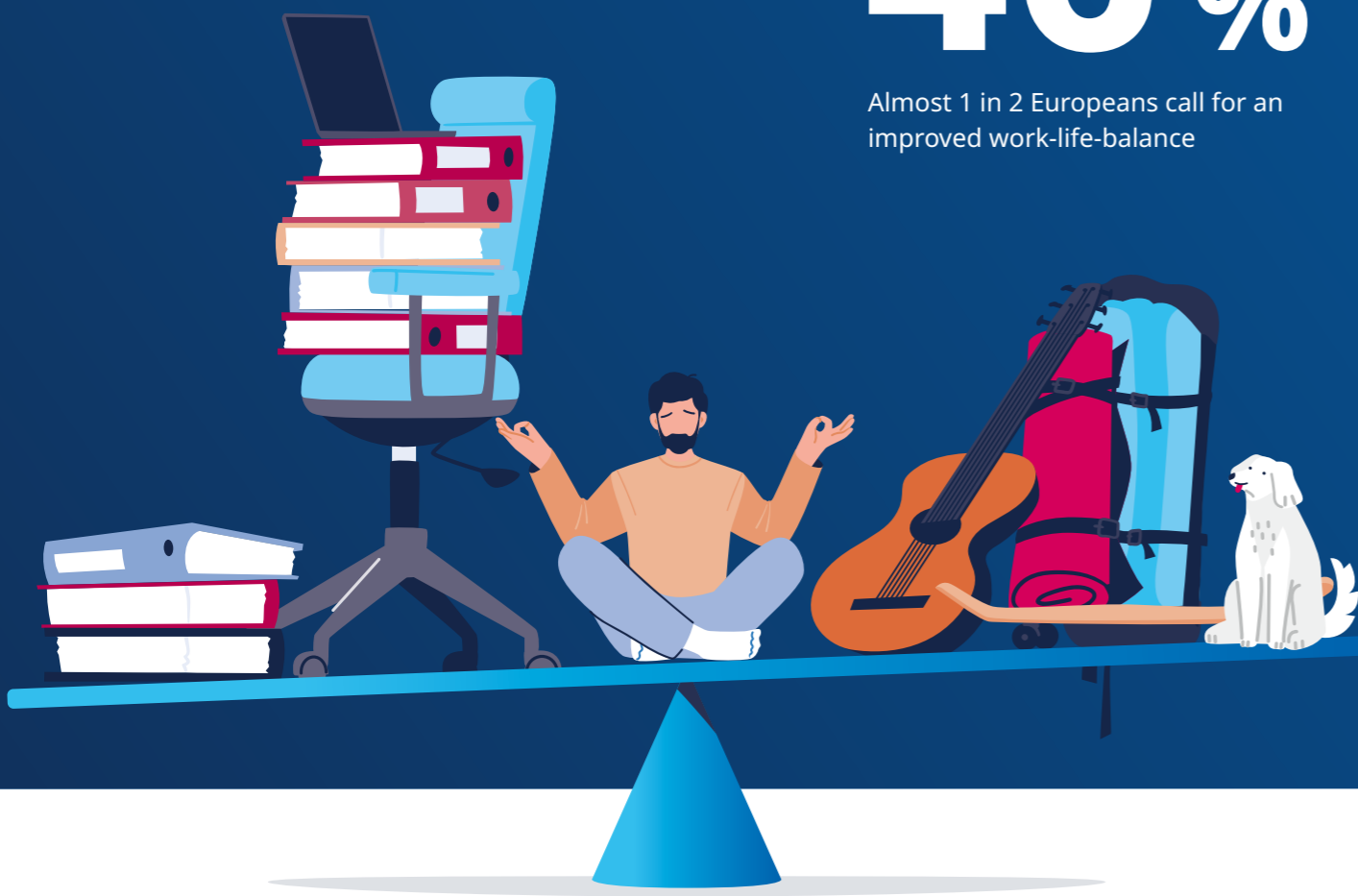
What can be done to reduce loneliness?

A frequently discussed solution in Europe:

Solution

46%

Almost 1 in 2 Europeans call for an improved work-life-balance



Europe in a pandemic of loneliness?

In 2023, the WHO declared loneliness a “global public health concern”, equating its possible health implications to heavy smoking and stressing that “social isolation knows no age or boundaries”. In fact, just over half—52 percent—of Europeans say they almost always, often or occasionally feel lonely. And while it may seem reasonable to assume that elderly people might be particularly affected by feelings of loneliness, the opposite is true.

Among Europeans over the age of 55, 41 percent say they feel lonely, which is considerably lower than the almost 2 in 3 (63) between the ages of 18 and 35. The majority of people who report spending a “long” (64) or “fair” (53) amount of time on social media are significantly more likely to experience feelings of loneliness than those who limit their screen time (43). People with extensive screen time also tend to experience more severe feelings of loneliness (44) than those with less time spent online (26)—and it probably comes as no surprise that Europeans under the age of 34 are much more likely to spend long hours looking at their device (41) than people aged 35–54 (22) and those above the age of 55 (13). In terms of self-awareness regarding this issue, young Europeans still have a long way to go: only 20 percent of them attribute their feelings of loneliness to extensive amounts of time spent on social media or playing computer games. To them, work (27) is the most pressing driver for loneliness, followed by remote working (15), childcare duties (15), loss of loved ones (14) or relocation for career reasons (14).

On a country level, people in Poland (61), Finland and Sweden (59 each), Slovakia (58), Italy and Kazakhstan (57 each) feel loneliest. Across Europe, work, insufficient amounts of free time (23), loss of partners, family members or friends (17) and poor health or mobility issues (14) are cited most frequently as causes of loneliness. Women (57) feel significantly lonelier than men (46) and are twice as likely to cite childcare duties (16) as a reason for feeling lonely than their male counterparts (8).

The good news: by and large, 63 percent of Europeans describe their loneliness, however frequent, as “not severe”. Overall, people who are satisfied with their appearance and have good mental as well as physical health are less likely to feel lonely.

Still, loneliness harbours serious possible long-term implications: aside from the more obvious consequences like depression and anxiety, it also increases the risk of strokes, heart disease, type 2 diabetes, addiction and dementia. To remedy the loneliness epidemic, almost 1 in 2 Europeans (46) call for an improved work-life-balance, especially in Serbia (59) and Portugal (58), and 43 percent hope for a better economic situation, particularly in Serbia (63). Other suggestions include improved availability and access to leisure activities (35), and three in ten (30) think they should take it upon themselves to spend less time online. In addition, 28 percent think there should be more targeted support catering to the elderly population, while 27 percent wish for better access to therapy, the need for which seems particularly dire in Spain (44), Poland (41) and Finland (40).

Uneven work-life-balance and a lack of therapy lead to exhaustion: 60 percent of Europeans say they have already suffered from or at least experienced temporary feelings of burnout. In 2022, when the Health Report last addressed this topic, this applied to 59 percent of Europeans. Now, people in Denmark (73), Serbia (72), Ireland (71) and Kazakhstan (68) most frequently report feelings of burnout. Perhaps surprisingly, those Europeans most familiar with burnout are those who have been working and studying for the shortest time: people between the ages of 18 and 34 (69). Furthermore, those who spend long hours on social media (68 vs 53 spending little time online) are more susceptible to burnout, as well as women (65) in comparison to men (54)

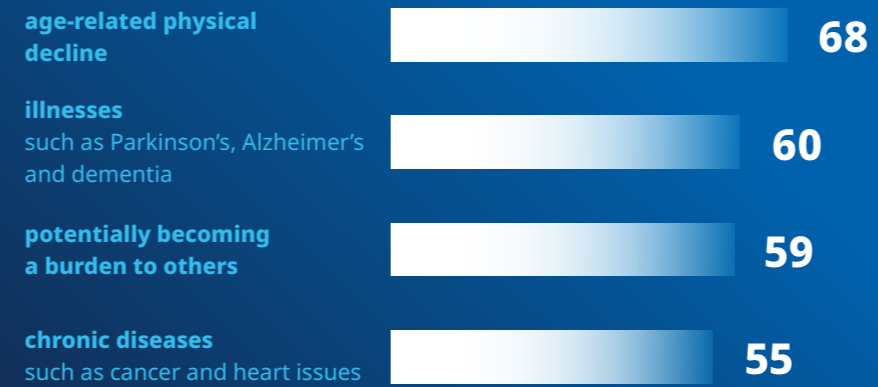
Ageing as major concern—especially for younger people

On top of their general tendency to voice concerns over their state of mind, young Europeans also worry about what the future might bring: 46 percent of them are generally concerned about the prospect of ageing and all that comes with it. >>



Europe's biggest fears about getting older

All data in %



On a European level, 43 percent of people say they worry about growing older, while 44 percent remain unconcerned at the idea, with an additional 13 percent being unsure. People in Poland (53), the UK (51) and Ireland (50) are most likely to harbour fears about ageing—as opposed to their counterparts in the Netherlands (31), Switzerland (32) and Serbia (33).

In terms of why some countries are unbothered about ageing, acceptance seems to play a decisive role. 79 percent of those who say they are unconcerned about ageing describe it as a “natural part of life”—which seems to be the leading sentiment of the unperturbed in Finland (87). A certain indifference towards things that cannot be changed is a consolation to 48 percent of those unconcerned about ageing, especially in Hungary and the Czech Republic (59). Other reasons include looking forward to retiring and having time to oneself or to spend with loved ones (16), which people in Austria (33), Germany (27), Sweden (26) and Switzerland (24) eagerly anticipate. Religion and the belief that there is more to the human

existence than this earthly life is a source of consolation for 16 percent of Europeans, especially in Austria, Switzerland, Ireland, Slovenia and Hungary (20 each). People who are happy (40 vs 59 unhappy), satisfied with their appearance (37 vs 54 unsatisfied) and have good mental health (38 vs 58 poor mental health) are less likely to be worried about growing older.

The most concerning scenarios for Europeans are the potential age-related physical decline they might experience (68), which particularly upsets people in Finland (79) and Hungary (77). The second most pressing worry is illnesses such as Parkinson's, Alzheimer's and dementia, which are associated with late onset—6 in 10 Europeans find them worrisome, especially people in Portugal (75). This is directly followed by the idea of potentially becoming a burden to others (59), also a major concern for people in Portugal (74) and Spain (73). Just over 1 in 2 (55) are afraid of chronic diseases such as cancer and heart issues, especially in Portugal (68), the Czech Republic (65) and Serbia and Sweden (63 each). Interestingly, a

decline in physical appearance is—if only marginally—more or just about equally as upsetting to Europeans (43) than the loss of friends and family (42). Only 1 in 3 Europeans are worried about becoming lonely in old age due to isolation.

Genetic testing—a sensible look into the future?

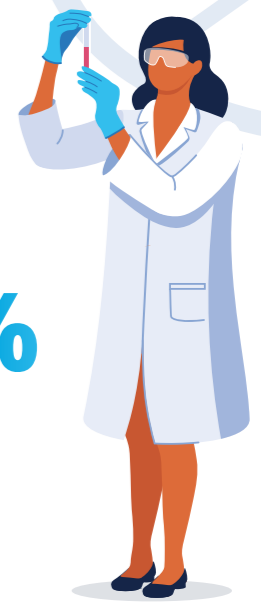
While some of those worries may be justified, there are methods available today which may help remedy or prevent some of the abovementioned scenarios from becoming a reality. Genetic testing, for instance, can help detect individual predispositions for certain illnesses, and—thanks to timely intervention—prevent or treat them before they manifest themselves.

Generally, 77 percent of Europeans would consent to such a test if their general practitioner recommends it—a decrease by 4 percentage points compared to 2023. Of those who would undergo genetic testing, 16 percent would feel uncomfortable with the idea of having their genetic information examined.

People in Portugal, who worry a lot about what could happen in old age, are the most open to genetic testing, with 9 in 10 saying they would consent to such a test. People in Poland (84), Serbia and Ireland (82) also have few qualms about such novel techniques. About 1 in 10 Europeans are wary of genetic testing and would prefer to remain unaware of potential future health problems (13), with most scepticism coming from Switzerland (22) and the Netherlands (21).

77%

of Europeans would do a genetic test if their GP recommends it



Selfcare & Appearance

Chapter Three

2024

What challenges are shaping Europeans' approach to health?

Despite reports of good physical health, Europeans are grappling with self-perception issues, especially women. Yet, there is a shift towards self-driven health improvement, including physical activities, healthy eating and mental health prevention, possibly spurred by growing dissatisfaction with healthcare systems.

Selfcare & Appearance

Analysis

A Tightrope Act:

Europe Caught Between Health-Activism and Insecurities

In light of growing tensions, Europeans are taking caring for their health into their own hands. But the road to wellbeing is littered with stumbling blocks: strong self-reported levels of physical health coincide with high numbers of Europeans who consider themselves overweight. Substantial portions of the population are invested or interested in appearance-enhancing products and procedures, underscoring a complex relationship between body image and self-confidence. Physical as well as mental well-being and happiness are intricately linked and need to be kept on the right path—women are particularly at risk of falling by the wayside.



Just over half of Europeans (54) declare themselves to be in good physical health. People in Uzbekistan (71), Austria (68), Romania (67) and Switzerland (66) feel they are in particularly outstanding condition. Just over a third of Europeans (35) describe their physical health as “fair”, and 11 percent as “poor”—led most notably by people in Sweden and Hungary (22 each) and the Czech Republic (18). There seems to be a clear link between perceived physical and mental health and overall happiness, as those who report poor mental health and below-average levels of happiness rate their physical health dramatically lower than those with good mental health (70 vs 17) and higher levels of happiness (68 vs 17).

Majority of Europeans report “unhealthy” BMI

Albeit controversial, the Body Mass Index (BMI), which calculates a numerical score by relating a person’s body weight to their height, is still widely used as a common tool to assess body fat percentage. In comparison to the slight majority of Europeans who consider themselves to be in good physical health, only 40 percent actually have a healthy BMI. People in Uzbekistan (52), Italy (48) and France (46) are particularly likely to fall into this range. Women (45) are more likely to report a healthy BMI than men (34). Just over a third (35) of Europeans would be considered overweight according to their BMI, and an additional 17 percent fall into the “obese” category with a BMI of 31 and above.

1 in 5 Europeans dissatisfied with their appearance

Taking into consideration physical health and BMI, about a third of Europeans (29) are neither satisfied nor dissatisfied with the way they look, while just about half of Europeans (49) are satisfied with their physical appearance. People in Uzbekistan (78) and the Netherlands (67) are the most confident about their appearance. The majority of those who feel good about their looks say they simply accept themselves as they are (63). Others either feel they have been blessed with good looks (23) or take pride in their physique (23). 16 percent say external validation in the form of compliments helps them feel good about themselves, and 15 percent say they have worked hard for their body. Over 1 in 4 Europeans (28) also point out that contentment with their physical appearance has increased with age.

Excess weight and self-comparison drive unhappiness

Around 1 in 5 Europeans (21) say they are dissatisfied with their body. In Romania (35), Kazakhstan and Ireland (31 each), people are least likely to be content with how they look. The same applies to women (46) compared to men (53). The most common reasons why people struggle with self-confidence in their appearance are excess weight (49) and simply finding other people more attractive than themselves (23). There seems to be an overall imbalance between men and women in terms of self-perception and satisfaction: despite reporting a healthier BMI than men on average, women (55) are significantly more likely than men (40) to cite feeling overweight as a reason for body dissatisfaction. Women between the ages of 18 to 34 are particularly hard on themselves, with 51 percent of them thinking they are overweight and 38 percent regularly comparing themselves to others, e.g. on social media. This compares to only 28 percent of men in this age group who worry about their weight, and 21 percent who feel pressured by how others present themselves online.

VMS key investment for many Europeans to support physical appearance

With nearly half of the European population feeling dissatisfied with their physical appearance and experiencing significant body image insecurities, what are their looks worth to Europeans in the truest sense of the word? Currently, the main appearance-related investments are vitamins and mineral supplements (VMS), on which 37 percent and 18 percent of Europeans, respectively, spend some or a considerable sum of money. General healthcare products are the second most commonly mentioned expenditure, with 54 percent purchasing them to improve their looks. Cosmetic products like make-up, moisturisers and the like are purchased by 52 percent of Europeans overall, including 71 percent of women. Gym or sports memberships, along with the required equipment, are almost equally likely to be part of European men’s (29) and women’s (26) healthcare spending balance sheets.

1 in 5
Europeans are dissatisfied with their body

Gender gap in openness to body modification

While only 2 percent of Europeans are currently spending money on plastic surgery, a significant share of them has at least entertained the idea of going to greater and more invasive lengths to improve their appearance.

Comparing the 8 percent of Europeans who have had aesthetic dental work, which is the most sought-after cosmetic procedure across the continent, to the 58 percent who would consider getting it if it were free, it becomes clear that cost is a strong inhibiting factor. 38 percent of Europeans would also consider laser hair removal, an interest driven particularly by Slovenia (48). Just under 1 in 4 Europeans (23) could imagine undergoing weight reduction or general plastic surgery, the latter of which Austrians (37) are most open to.

While more men would consider a hair transplant (23 vs 16), women are in the lead in terms of all other types of aesthetic procedures: 61 percent of women would get aesthetic dental work (55 men), 52 percent would consider laser hair removal (24 men), 30 percent are open to plastic surgery (15 men). Furthermore, 29 percent of women would consider weight reduction surgery (17 men) and 28 percent could see themselves getting Botox or fillers (10 men).

It seems that, despite all efforts to overcome unrealistic beauty ideals, the pressure on women to adhere to certain standards of beauty and looks, whether self-imposed or external, remains significant.

Self-actualisation trumps societal pressure as a corrective catalyst

However, motivations for cosmetic procedures are mainly driven by individual interests, not a desire to appease others: 45 percent of Europeans say they would undergo a procedure to feel better about their body, and 41 percent are convinced such interventions could help with their self-confidence. A further 28 percent would seek treatment to reverse the effects of ageing, while 25 percent are confident it would help them feel more like "themselves". Only 10 percent would undergo body modifications to be more socially acceptable and 8 percent to make their partner happy.

The overall attitudes regarding the topic of physical appearance, self-confidence and social impact are conflicting.

77 percent of Europeans agree that society and the media place too much emphasis on physical appearance, while 71 percent believe that society still has a long way to go when it comes to accepting different types of beauty. 59 percent also agree that a person's status is determined by their physical appearance, and 56 percent call for stricter regulations and more transparency about the filters being used on social media. 54 percent even say they believe plastic surgery should be reserved for extreme cases rather than the pursuit of a certain type of beauty. Even though Europeans see through the societal beauty bias, 36 percent are certain that their mental health would improve significantly if they were happier with their appearance.

Selfcare & Appearance Possible solutions

What can be done to help Europeans live a healthier life?

Europeans are already taking action to improve their well-being. Their top three requests for further support include advice on how to reduce their sugar and fat intake, a monthly day off work or school for self-care and discounts on their health insurance.

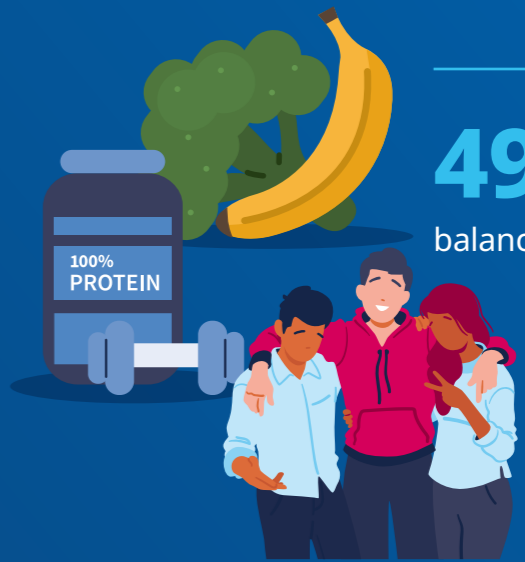
Solution 1

81% regular physical exercise



Solution 2

49% balanced diets



Solution 3

31% social connections

Europeans take charge of their health

In light of dissatisfaction with healthcare systems, mental health issues and low body confidence, Europeans nevertheless feel motivated to step up and take their health into their own hands. 89 percent of Europeans currently engage in activities to support their overall well-being. Physical exercise is the most popular habit, with 1 in 2 Europeans moving their body regularly. The most active Europeans can be found in Finland (66), Spain (62) and Italy (60). While it seems obvious that the majority of those who work out do so to feel better physically (87), improved mental health is also a strong motivating factor for 60 percent—and more so for women (63) than men (57).

The STADA Health Report 2023 already brought to light a lack of preventive healthcare in Europe, and seeing as only 33 percent of Europeans consider such appointments part of their personal health routine, this still rings true today. People in the Czech Republic (56), Germany and Slovakia (48 each) are most likely to keep up with preventive check-ups.

Healthy eating valued for physical and mental benefits

The second most popular habit is following a healthy diet, which 49 percent of Europeans say they do. Along with Italy (67), the Netherlands and Spain (68 each) are the self-reported forerunners of balanced nutrition. And the benefits are clear: 83 percent say they eat a healthy diet to feel better physically, and 50 percent say that good food is even good for their mental health. Vitamins and nutritional supplements are taken by 32 percent of Europeans and most popular in the Czech Republic (51), Slovakia (50) and Poland (44).

Social connections build mental resilience

Regular time spent with friends is a major mood booster for 1 in 3 Europeans (31), 79 percent of whom say that joint activities improve their mental well-being significantly. Overall, women are more likely to engage in activities expressly targeted at mental well-being (42) than men (36), seek out stress-reducing activities like meditation (21 vs 15) more frequently and place more importance on time spent with family and friends (34 vs 28 men).

Calls for targeted actions to support healthy choices

While it is commendable that Europeans are investing time, money and effort in taking care of themselves, additional support from external sources could help complete the puzzle towards better health in the future. To further improve their well-being, 68 percent of Europeans ranked "Receiving advice on how to improve their diet to reduce intake of sugars and fats etc." among their top three suggestions for external measures, meaning that consumers should have an easier time making healthy choices from the get-go. A day off work or school every month for self-care would be much appreciated by 61 percent. Just over half of Europeans (51) would like to be offered discounts on their health insurance, and an equal number would appreciate the same for other well-being activities such as gym memberships.

Bonus programmes or incentives from health insurance companies, which already exist in some instances, are among the top three most important measures in the eyes of 43 percent.

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