

# Global Hygiene and Health Survey 2022

The Future of Well-Being



# Agenda

1. Background
2. Future Personal Care
3. Future Hygiene Dialogue
4. Future of Caregiving
5. Health Threats of Tomorrow
6. Redesigning Public Spaces
7. Sustainable Consumption

# The Future of Well-Being

## Background

The world is evolving and changing, perhaps faster than ever. New pandemics and a shift in world order have affected people immensely - physically and mentally. It has also affected our ideas of health and well-being, and of ourselves. The stages of life are not as set as they used to be. Boys and girls hit puberty two years earlier than before, first time parents can be up to 40 years apart, and we see a "new" generation of youthful and active seniors.

Essity is a part of all stages of life. Not only offering solutions and products for people's everyday hygiene and health needs, but also spreading awareness about social stigmas and taboos, which have a negative affect on people's well-being. Taboos and stigmas that hinder access to the right solutions for people's needs and are detrimental to their mental well-being. In order to bring awareness to the importance of hygiene and health and its link to well-being, Essity is looking at the future of well-being to find the solutions for a healthier next generation. This survey is a part of the foundation of this effort.





# From Now to the Future of Well-Being

Previously, we conducted the “**Essentials Initiative Survey**” to investigate attitudes and behaviors towards health and hygiene, with the aim of breaking existing stigmas and taboos that have a negative effect on people’s lives.

This year, the “**Global Hygiene and Health Survey**” will investigate the future of well-being, looking at the gap between the current behaviors and attitudes of people towards well-being and how they would like to live in the future. The report will also explore knowledge gaps and lived experiences with respect to health and hygiene - in order to outline the barriers and solutions for well-being throughout the modern day life-cycle.





# Survey Methodology



The survey has been planned, monitored and analyzed by United Minds and the data has been collected with the assistance of survey provider CINT.



The standard method for carrying out quantitative surveys are digital questionnaires.



Digital questionnaires are distributed through web panels and reach the respondents by e-mail.



Data collection took place during May 3 – May 31 in 2022 through web panels in the respective countries.



# Markets Participating in Survey



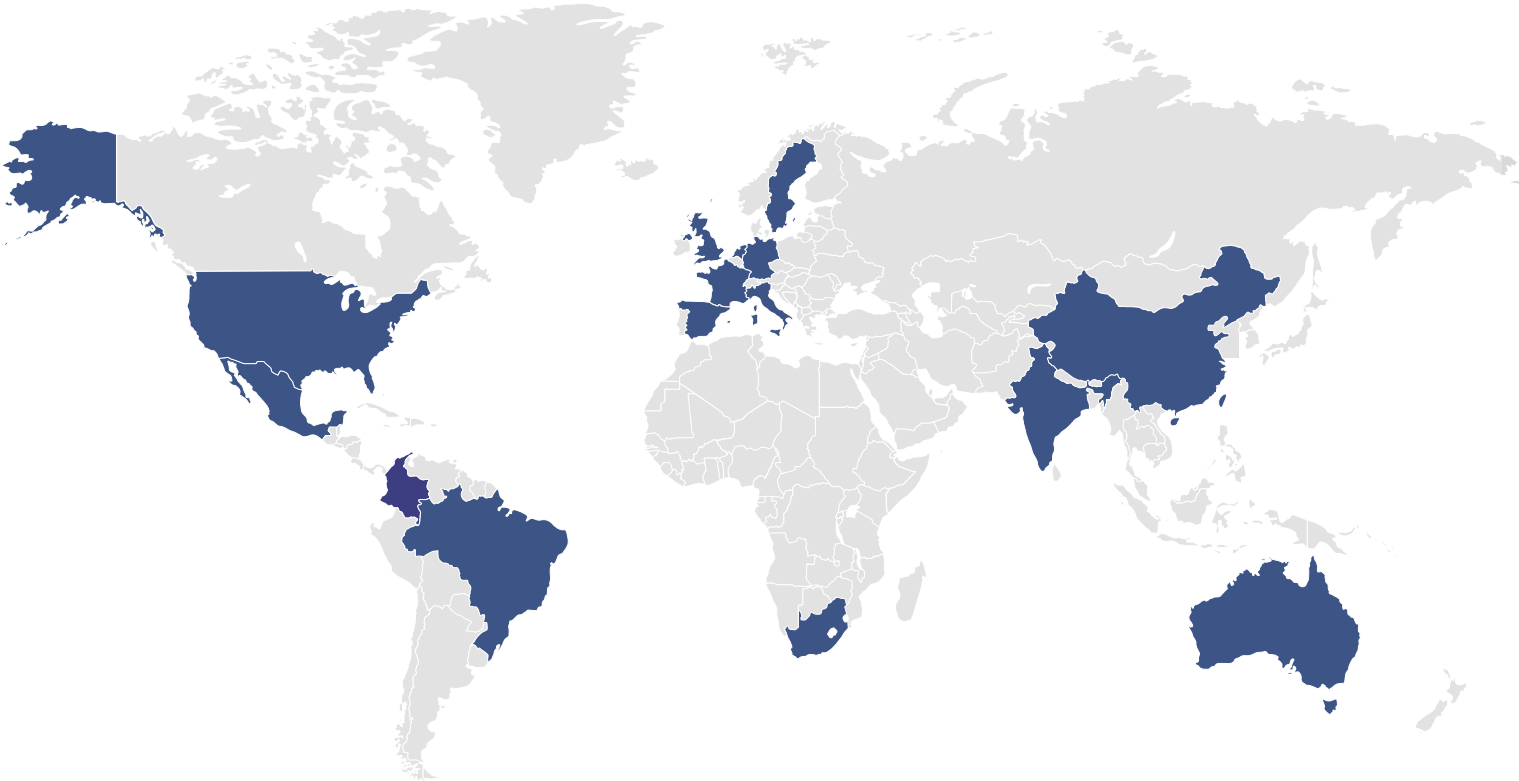
Answers from a total of **15 246** respondents have been collected in 15 markets.



National quotas have been used to obtain accurate representation of age and gender



This report presents the overall results as a mean average of the answers from all countries





# Chapter Overview



# Topics seen as barriers to well-being

**67%**

say they experience a barrier to living healthier -  
time and motivation are the biggest barriers

**13%**

of people aged 66-80 years old feel safe about  
hygiene standards in public washrooms

**59%**

of men think that nothing can be done  
about pain and mood swings women  
experience during menstruation

**42%**

say that society and the scientific  
community should focus most on  
improving mental well-being

**23%**

with urine leakage avoid  
talking about urine leakage.



# Positive enablers seen as contributors to well-being

61%

agree that digital healthcare and services save time for caregiver to spend with patients

45%

say schools creating spaces for dialogue and education are necessary to reduce the shame and reluctance to discuss health and hygiene areas

34%

say being free from pain and discomfort is essential for their daily well-being

38%

say better hygiene standards would make the biggest difference to help stop the spread of resistance to antibiotics

61%

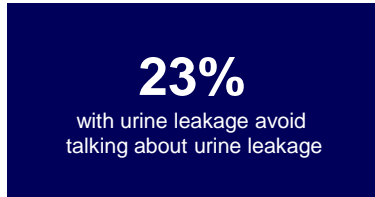
say they themselves are responsible for consuming sustainably

# Executive Summary

## TABOOS

**Among those with urine leakage, menopause and menstruation many still suffer in silence**

More needs to be done to reduce the embarrassment in openly talking to others about health and hygiene. Especially so that people can gain access to the right information and solutions for better health and hygiene. Individuals going through menopause, urine leakage and menstruation still avoid sharing their experience with others and say they lack access to basic hygiene products in public spaces – meaning that they suffer in silence.



11% who menstruate avoid talking about menstruation

39% experiencing urine leakage want access to more basic health and hygiene products

46% who menstruate want access to more basic health and hygiene products in the ideal future public washroom

## HYGIENE STANDARDS

**Seniors don't feel safe about hygiene standards in public washrooms – more must be done to address their needs in public spaces**

With the growing population of elderly worldwide, there is a demand to address their needs and wants in public spaces. Seniors feel the most unsafe about hygiene standards in public spaces, especially in public washrooms. Overall, seniors aged 66-80 years want greater accessibility to washrooms in public spaces. For the ideal future public washroom, the elderly have higher demands on the cleanliness, accessibility and smart solutions such as connected washroom devices.



68% of people aged 66-80 years want self-cleaning and odor-controlled toilets in their ideal future public washroom

59% of people aged 66-80 years want contactless washrooms in their ideal future public washroom

87% of people aged 66-80 years old want more accessibility to washrooms in public spaces

## KNOWLEDGE GAP

**Women are taking more responsibility when it comes to health and hygiene dialogue - men must take a more active role**

When asked to self-estimate their knowledge, individuals are most knowledgeable about menstruation, infections and wounds. However, there is large knowledge gap between men and women when it comes to feminine care. Women are more knowledgeable about menstruation, menopause and endometriosis than men – both in terms of self-reported levels and facts. Women learn more about these areas from their mothers, while men mostly rely on their partner for information about them.



75% of women are knowledgeable about menstruation

45% of women have learned about menstruation from their mother

31% of men have learned about menstruation from their partner

## MOTIVATION

**Lack of motivation is the biggest barrier for individuals in improving their health and hygiene**

People want to improve their health and hygiene, but face barriers to be as healthy and hygienic as they want. Rather than cost or lack of access to the right tools and knowledge - the biggest barriers are motivation and time. These barrier are made worse due to the worries of an uncertain world, which weighs heavy on people's minds. Better health and hygiene behaviors are difficult to strive for or prioritize as we always feel occupied with more urgent matters.



36% experience barriers for a better personal hygiene

31% say a barrier for healthier lifestyle is lacking self-motivation

25% say a barrier for healthier lifestyle is that they don't have enough time

## MENTAL WELL-BEING

**The threat from antimicrobial resistance to public health persists – constant threats are also taking a toll on mental health**

The overall worry for global health threats is increasing every year. The threat from pandemics and AMR to public health persist over years. With the ongoing conflicts in Europe, war and food shortage are also viewed with more concern. The mental toll of constant danger and worry is beginning to show. For individuals, the biggest focus for society and the scientific community in the next five years should be mental health, along with cancer and viral diseases. The concern is most shared among the youth, who are also more disproportionately affected than seniors.



34% of 18-25 years old say they are experiencing mental health issues

30% say they want to focus on worrying less to improve their well-being in the future

41% say that society and the scientific community should focus on cancer in the coming 5 years to improve well-being



# Executive Summary

## COMMUNITY

**All of us are responsible for creating a healthier future – a need to look at the collective health along with individual**

Rather than placing the emphasis on governments, organizations, adults or the young, we think that all of us - as a collective are responsible for a healthier tomorrow. However, when asked what is most important for their well-being people chose individual aspects such as having financial security or a healthy diet, before actions which create a healthier community through activism for society or being active part of community. For all of us to be as healthy as possible, we need to start thinking of the collective health along with our individual health.

**34%**

say that all of us are responsible for a healthier tomorrow

43% say they want to exercise regularly to improve their well-being in the future

6% say activism for a better society is essential to their well-being in the future

16% say that all global organizations are responsible for a healthier tomorrow

## ACTIVE LIFESTYLE

**An active lifestyle is most essential for people’s well-being – people do not fully understand preventive health**

Well-being is more than having your basic needs (food, shelter, sleep) met. The ability to have an active lifestyle, exercising regularly and freedom from pain and discomfort are most essential for individuals' daily well-being, after having financial security and healthy relationships. However, knowledge about how an active lifestyle can reduce pain and risks of health complications is low. Enabling individuals to have an active lifestyle regardless of health and hygiene status will have a positive impact on people’s overall physical and mental well-being.

**34%**

say being free from pain and discomfort is essential for their daily well-being

30% say an active lifestyle is essential for their daily well-being

54% don't know that being active when menstruating can relieve pain

44% don't know that maintaining a healthy weight can lower the risk of lymphedema

## DIGITAL CARE

**Digital healthcare services and applications are welcome solutions for caregivers and caretakers**

The overall outlook towards digital healthcare is positive among caretakers and caregivers. Time saved for caregivers, along with more control and flexibility in treatments and choice of providers are the top perceived benefits. There is still hesitation when it comes to data privacy and protection. Besides digital aids, the older respondents feel that governmental aids, complementary services and freedom in care providers can make the biggest difference for caregivers today.

**61%**

agree that digital healthcare and services save time for caregiver to spend with patients

45% feel comfortable sharing their personal data

40% of people aged 66-80 years believe complementary services would help people be better caregivers

38% of people aged 66-80 years believe that being able to freely choose between care providers would help people be better caregivers

## SUSTAINABILITY

**Individuals feel responsible for sustainability, but are most willing to comprise their current lifestyle with easier behaviors then difficult**

The worry for global warming and climate change persists. Individuals believe that they themselves are most responsible for consuming sustainably. Governments and other legislative institutions are seen as less responsible for sustainable consumption. There is a willingness to pay more for sustainable alternatives but when it comes to behavior changes for a more sustainable living, individuals would rather consume less or have less variety in options.

**61%**

say they themselves are responsible for consuming sustainably

24% say governments are responsible for individuals' sustainable consumption

58% say they are willing to consume less to have a more sustainable lifestyle

36% say they are willing to pay more to have a more sustainable lifestyle

## SCHOOL AND EDUCATION

**A majority feel that schools should play a bigger role in reducing shame and taboos – yet many feel discomfort talking to teachers**

Few feel comfortable discussing health and hygiene matters with their teachers but most feel that schools have a large role to play in reducing shame and reluctance to speak about health concerns. Schools and teachers thus need better tools, material and routines to facilitate conversations, in order to break down the barriers and spread awareness about health and hygiene.

**45%**

say schools creating spaces for dialogue and education are necessary to reduce taboo and stigma

5% feel comfortable discussing menstruation with their teachers

4% feel comfortable discussing urine leakage with their teachers

50% say that governments and public authorities should make sure menstrual health is taught in schools

# Background

1

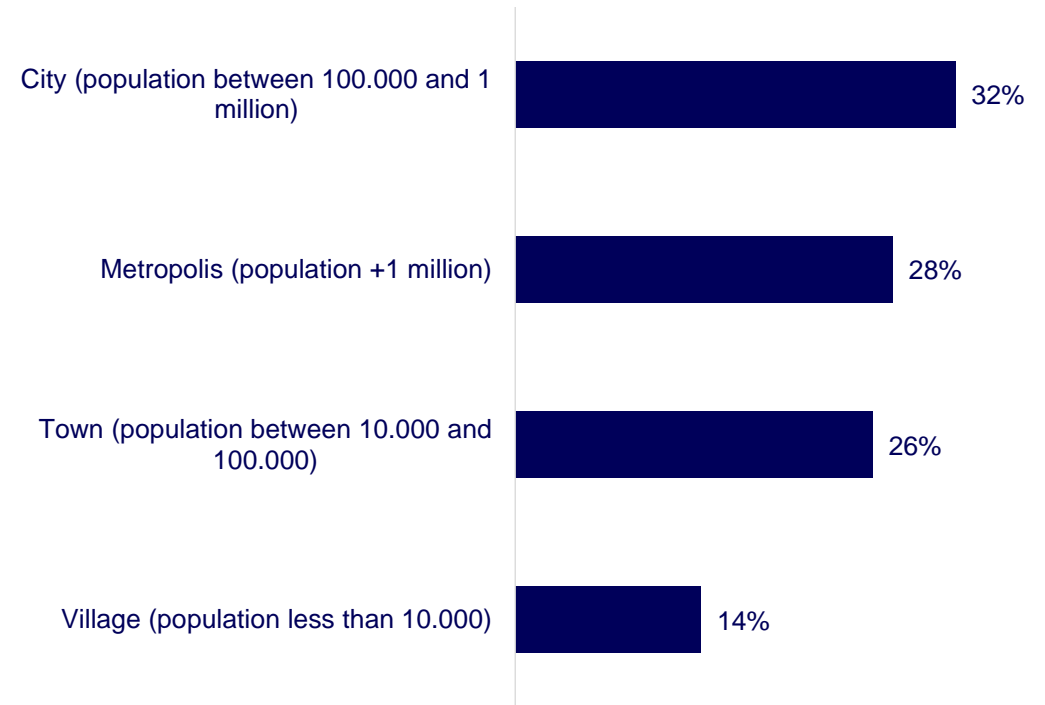


# Background Variables

## Respondents per Market

India	1097
Sweden	1021
South Africa	1017
Brazil	1016
UK	1016
France	1015
Australia	1012
Colombia	1011
Italy	1011
Mexico	1010
Spain	1009
Netherlands	1006
Germany	1006
USA	1000
China	999

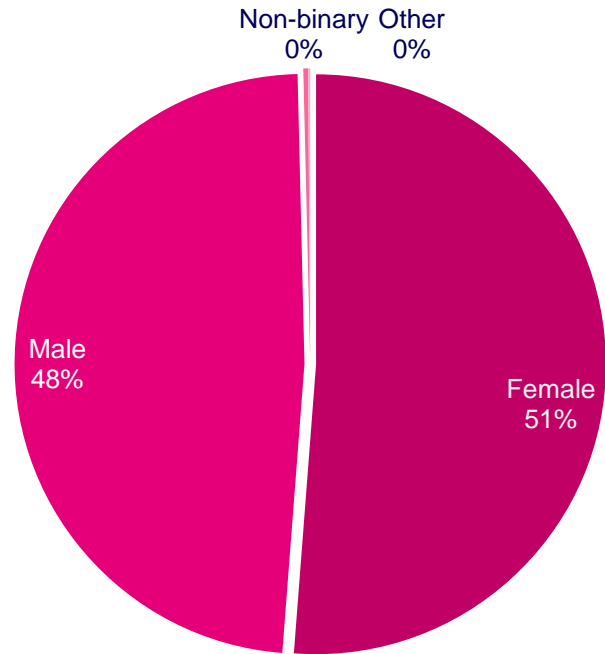
## Distribution of City Size



# Background Variables

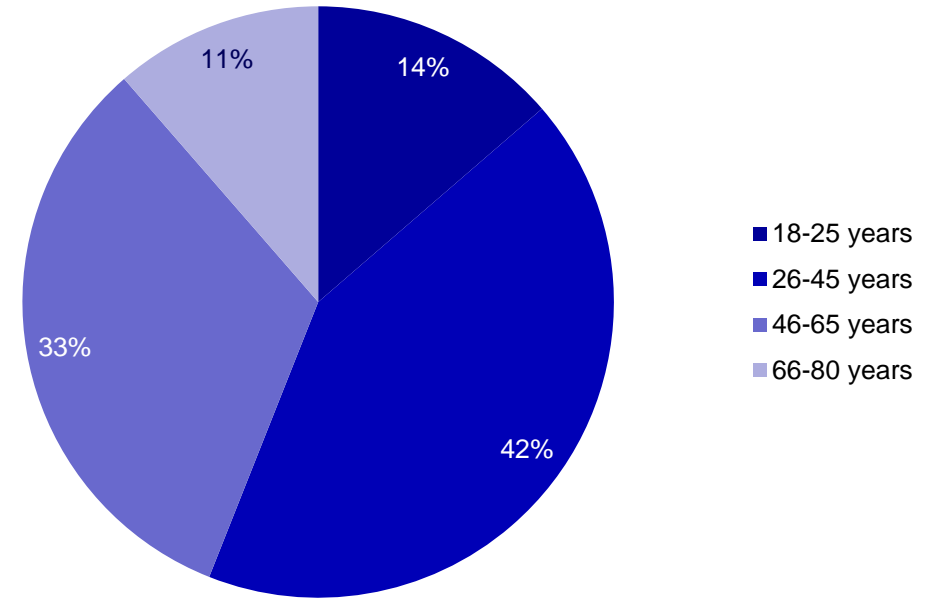
## Gender

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## Age

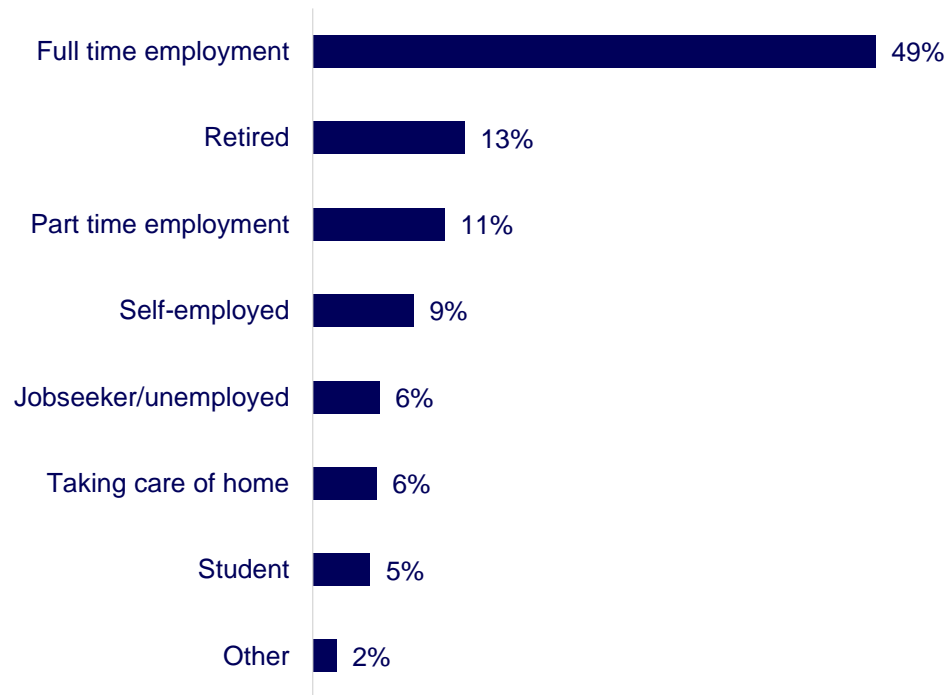
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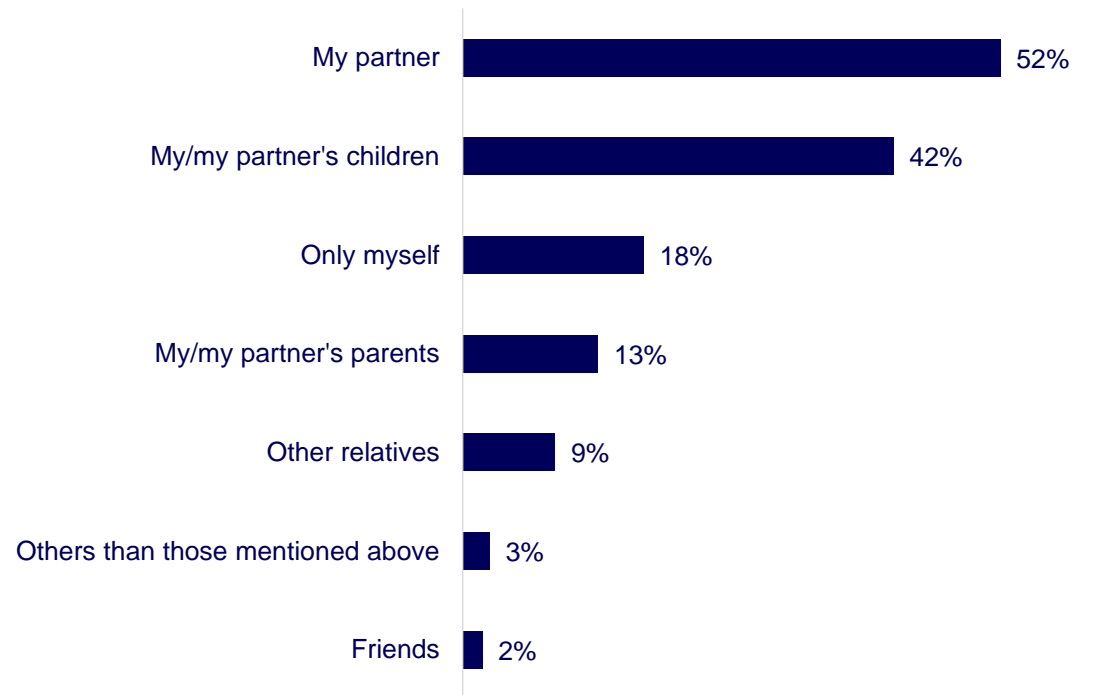


# Background Variables

## Occupation



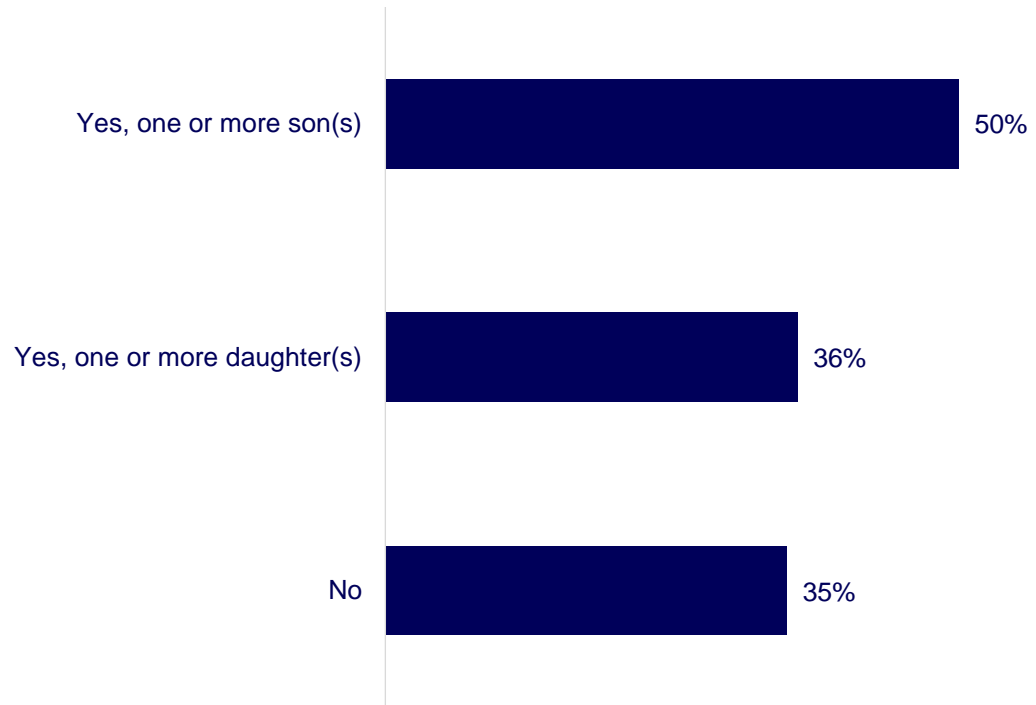
## Household



# Background Variables

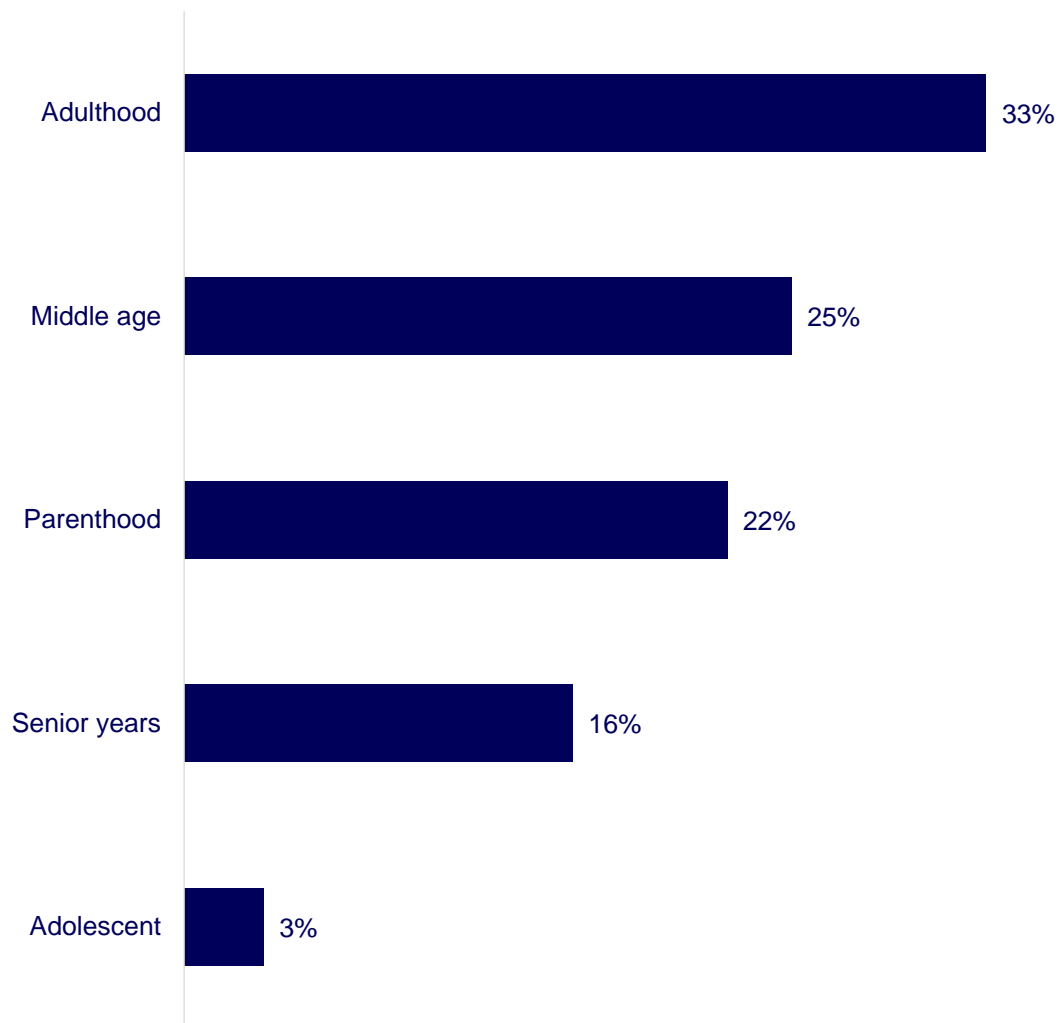
## Has Children

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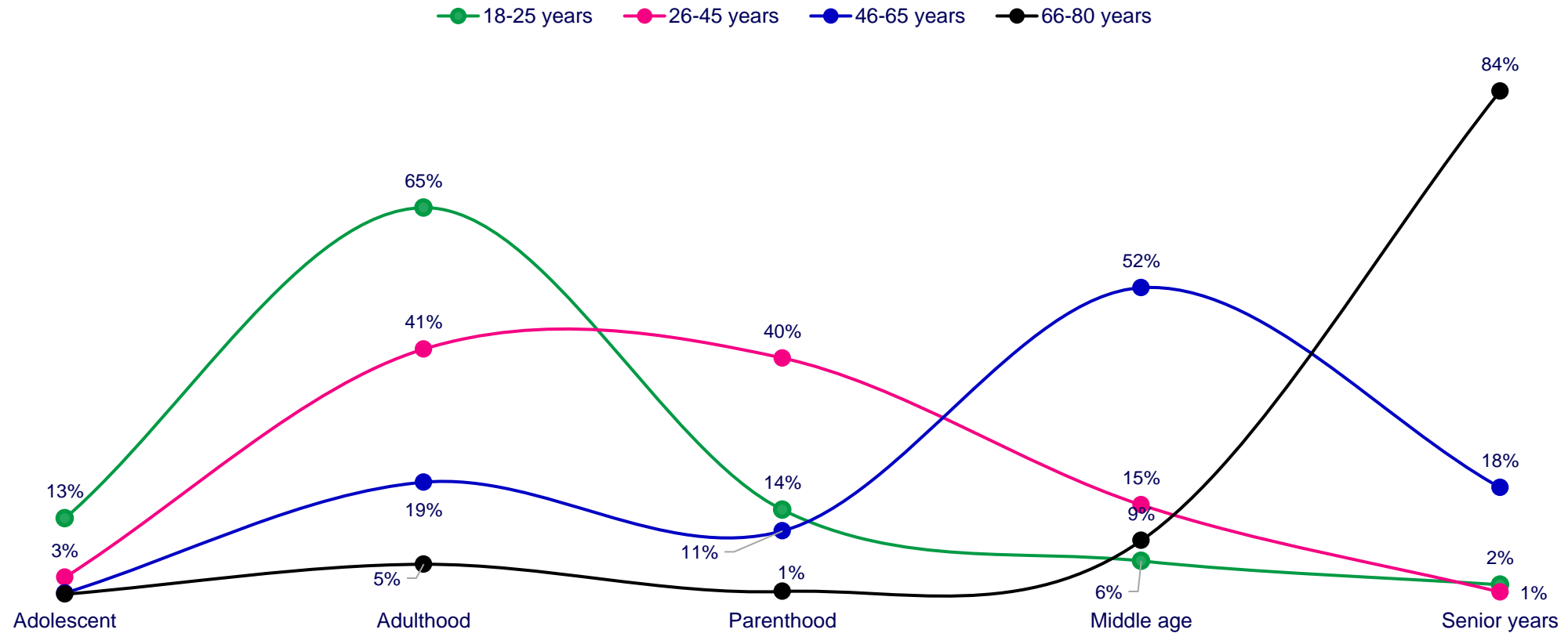


# Generally, most see themselves now in the life stage of adulthood



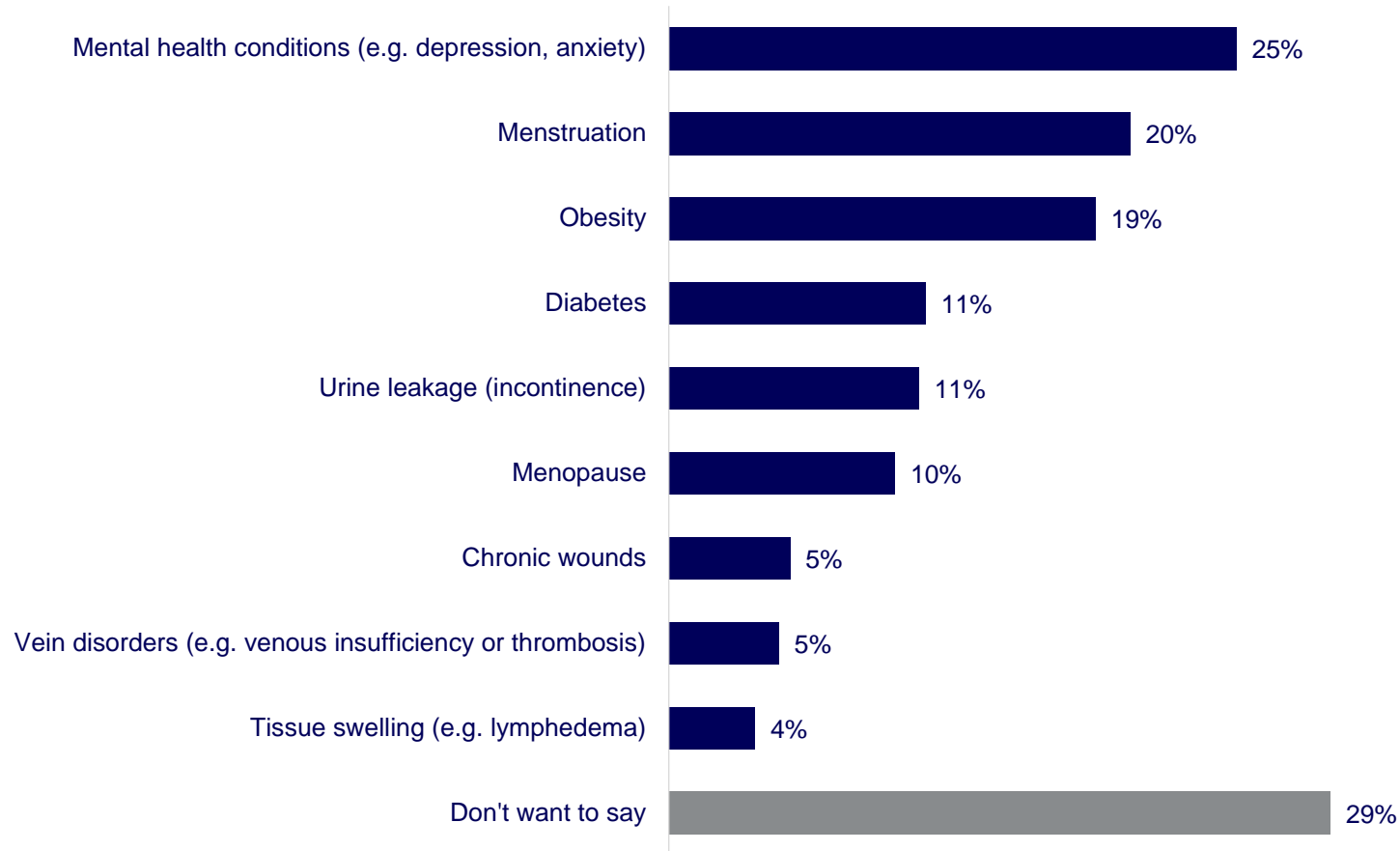
# Largest variation of what the stage in life people see themselves now for people aged 46-65 years

People aged 18-25 years old mostly see themselves in adulthood, some in parenthood and adolescence. People aged 26-45 years old mostly identify as adults or parents, and elders aged 66-80 years old are a majority in senior years.



# 1 in 4 say they are going through/experiencing mental health conditions such as depression or anxiety

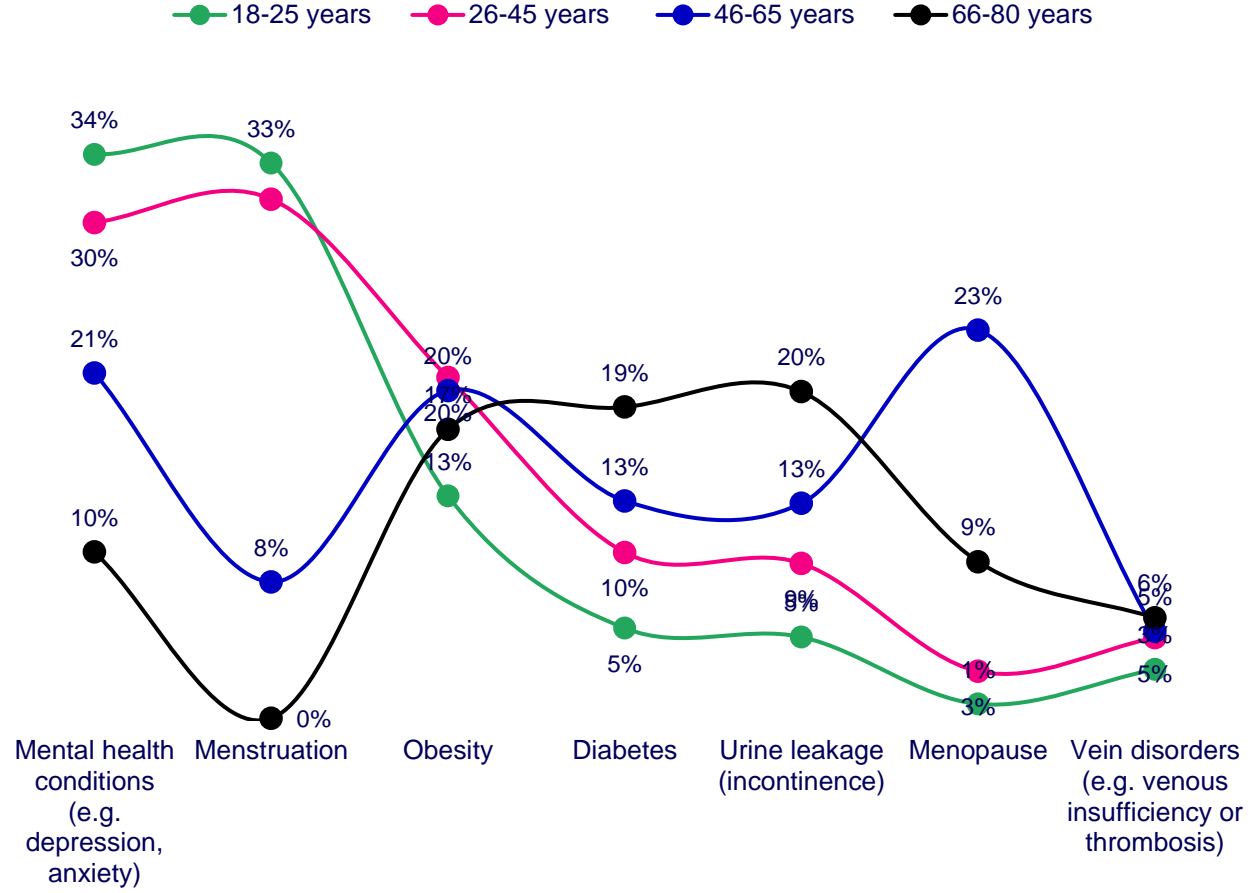
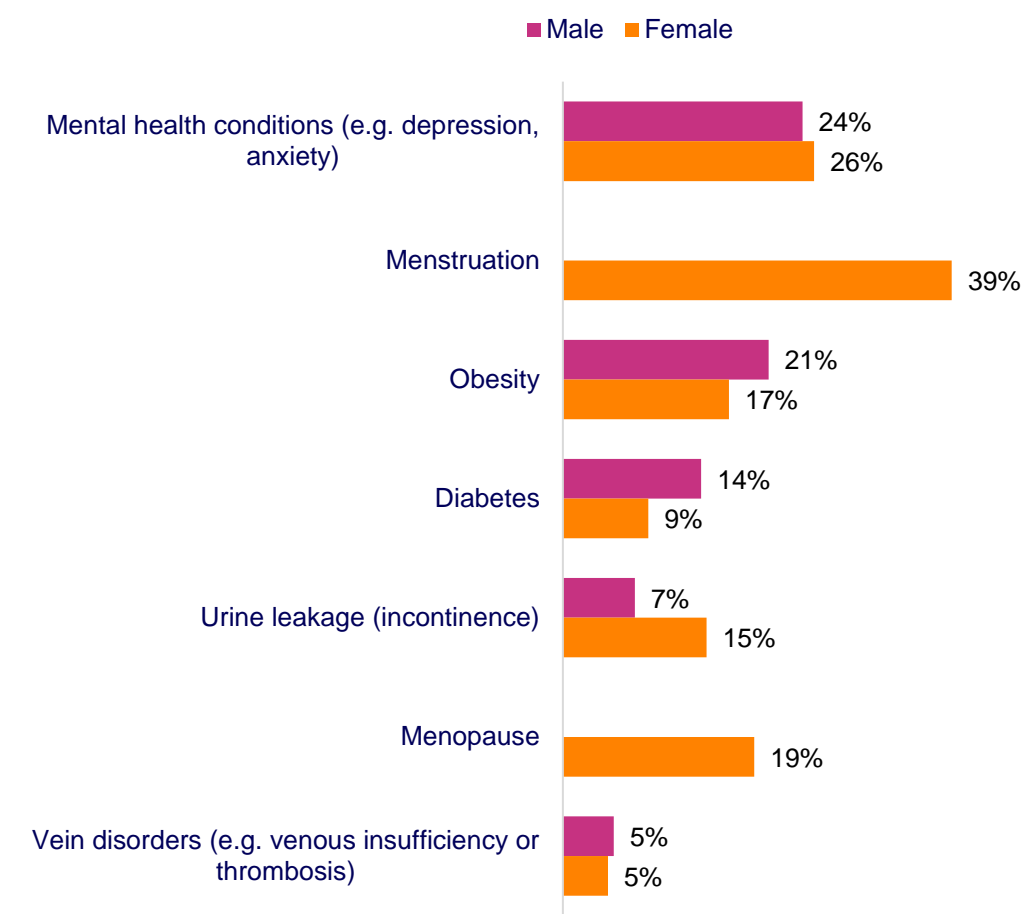
Menstruation and obesity are experienced by almost 1 in 5. Diabetes, urine leakage and menopause by 1 in 10. Almost 1 in 3 don't want to disclose in the survey if they are experiencing or going through any health or well-being conditions.



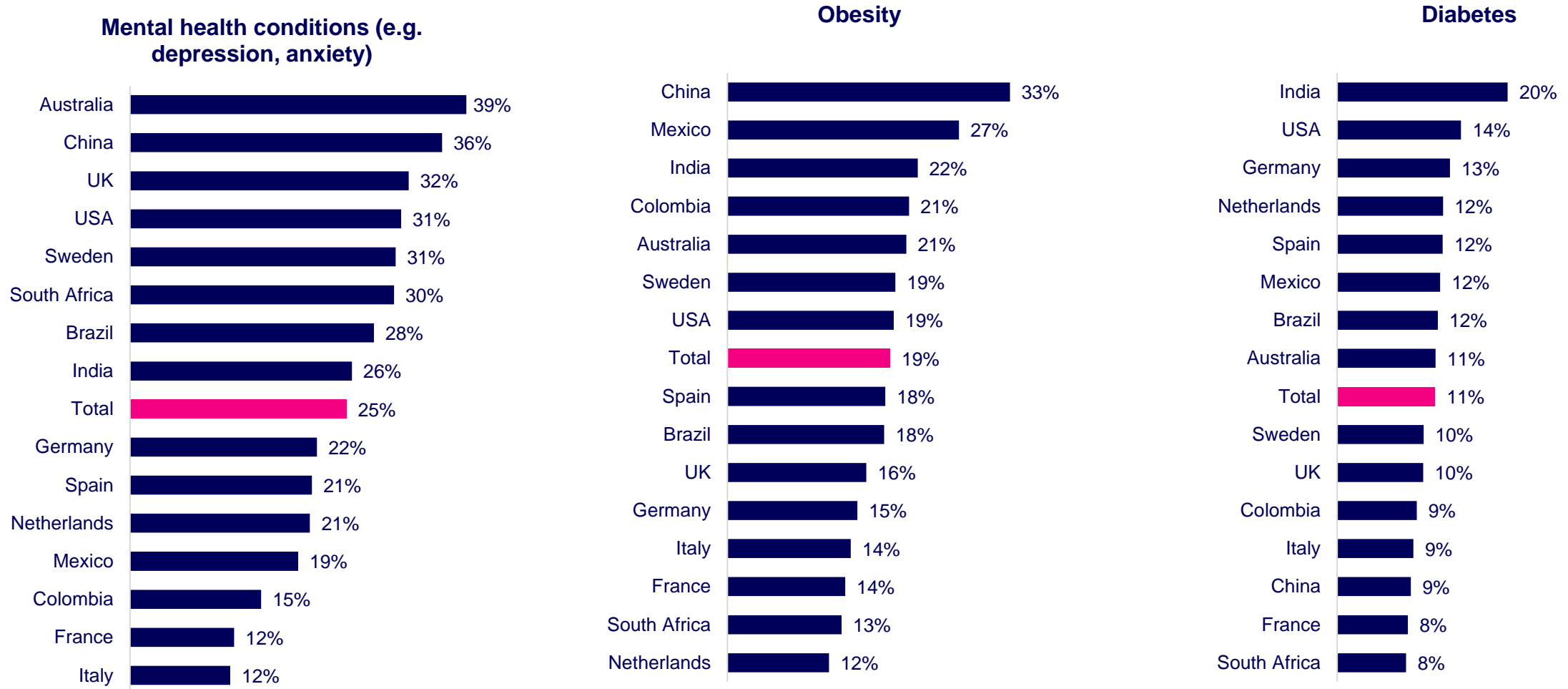


# Higher self-reported mental health conditions amongst younger people than senior

33% of women below 25 say they are menstruating and 31% of women form 26-45 years. Overall, 40% of women say they are menstruating. Females twice as likely to self-report urine-leakage than men.



# Large differences between countries when it comes to mental health conditions, obesity and diabetes



# Future Personal Care

2



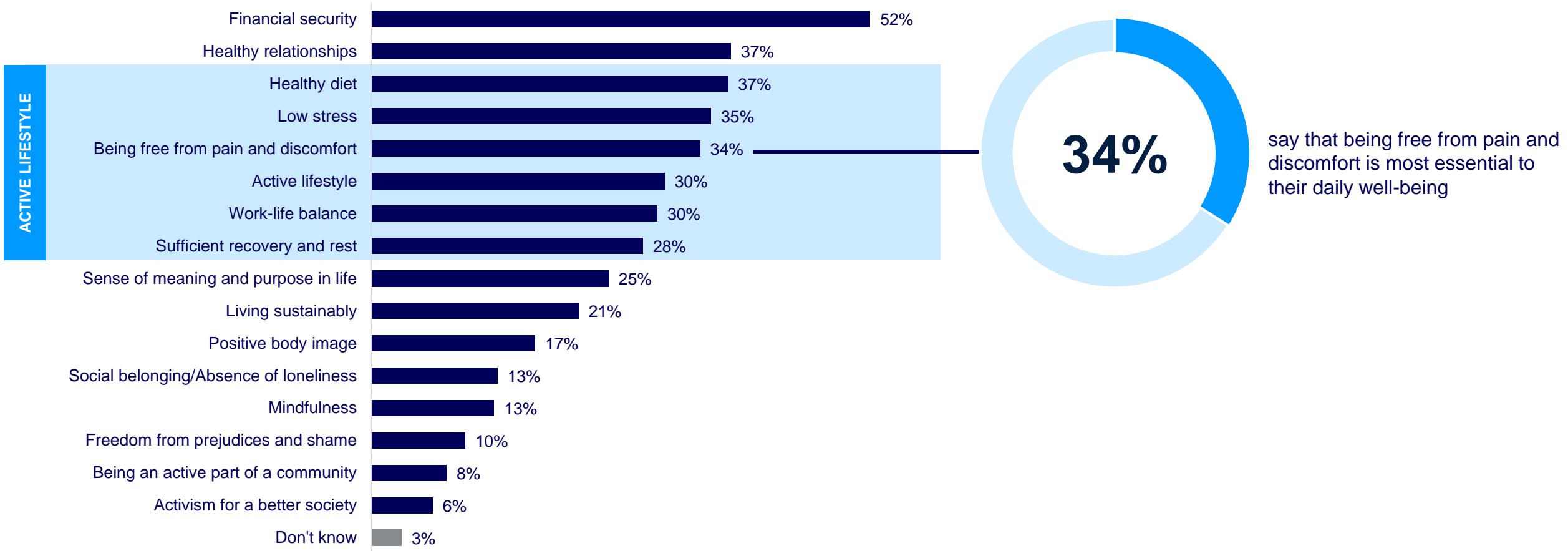


# 67%

say they experience a barrier to living healthier -  
time and motivation are the biggest barriers

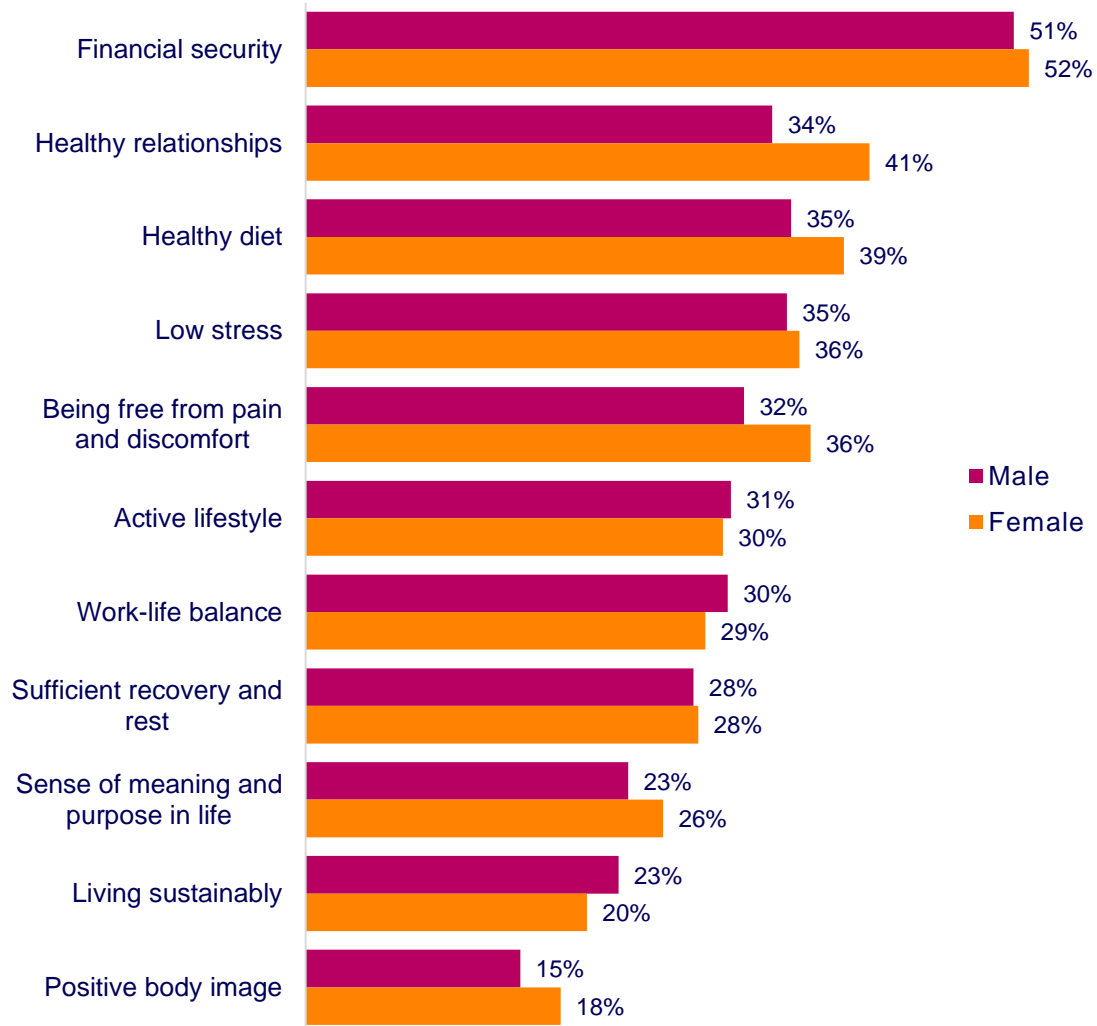
# Having financial security and healthy relationships are highest on the essentials list for people's well-being

Having an active lifestyle is more essential to people's daily well-being than being a part of a community. 1 in 3 say that it is essential to be free from pain and discomfort.



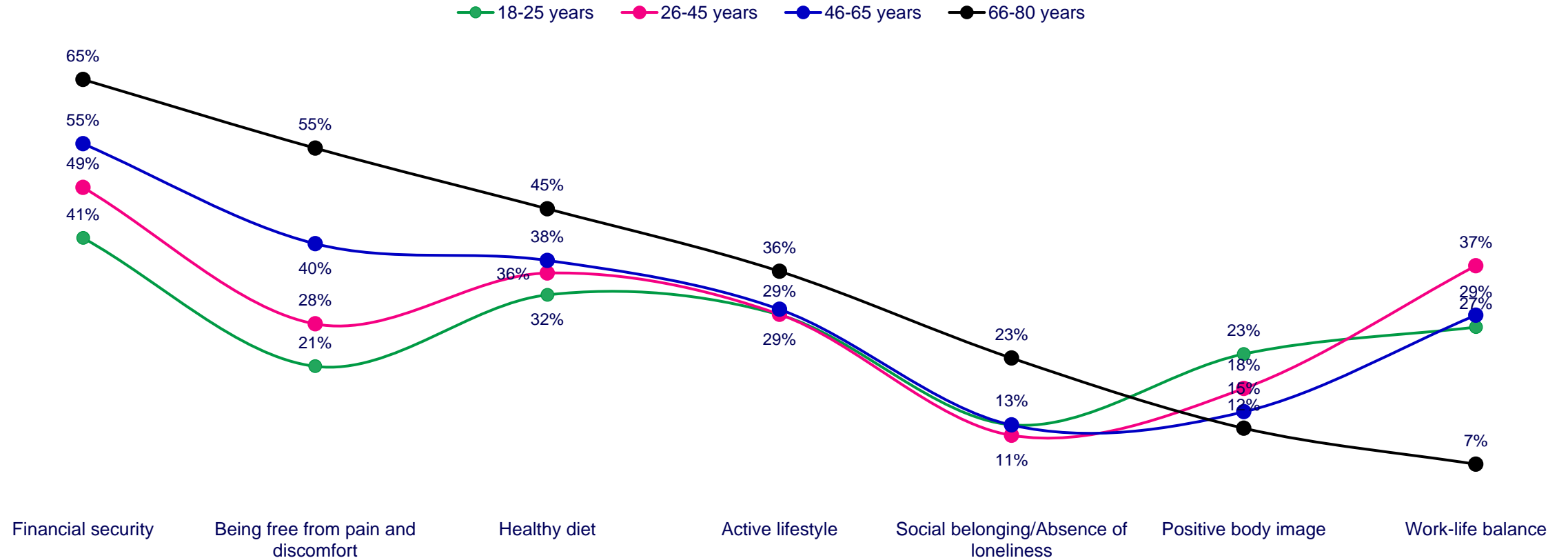


# Healthy relationships, diet and being free from pain and discomfort are more important for females than males





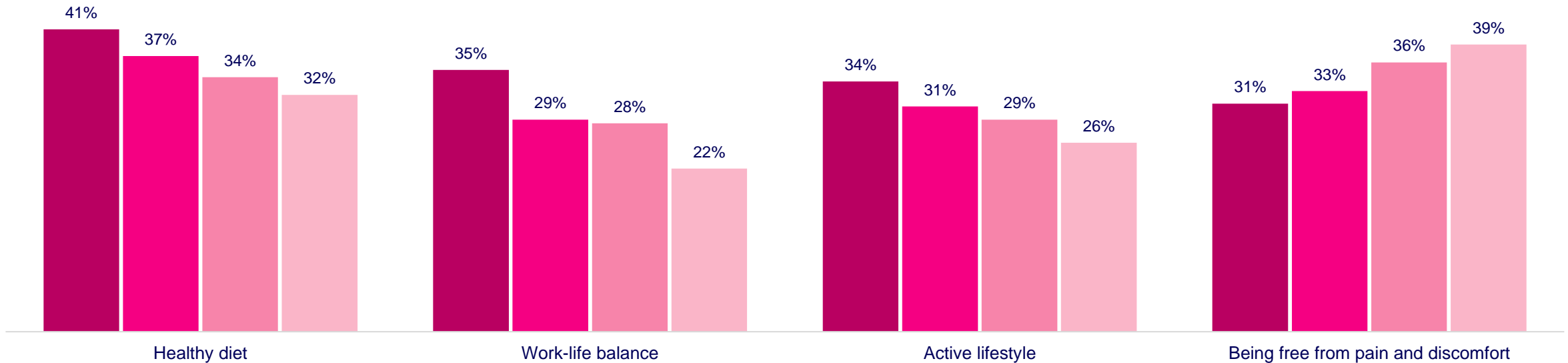
# The older you are the higher the focus on health, the younger you are the higher the focus on positive body image and work-life balance



# Healthy diet, work life balance and an active lifestyle are more important in the urban areas than rural

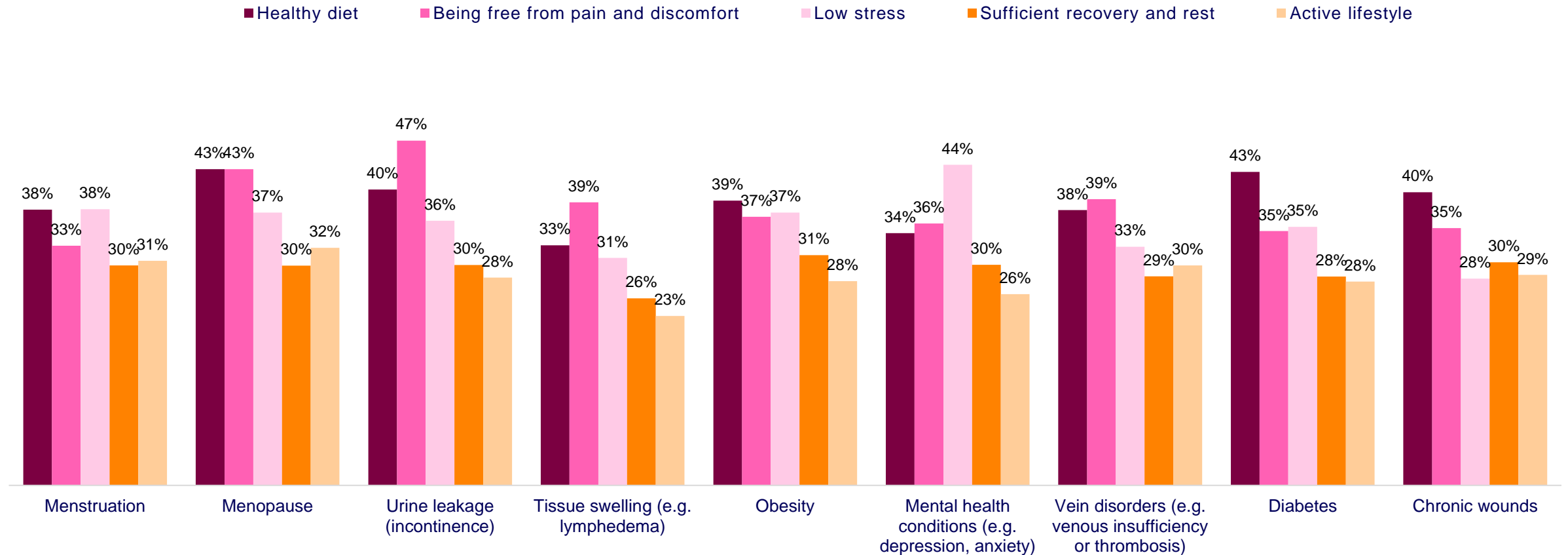
Being free from pain and discomfort is more important for rural areas.

■ Metropolis (population +1 million) ■ City (population between 100.000 and 1 million) ■ Town (population between 10.000 and 100.000) ■ Village (population less than 10.000)



# For people going through any of the following, a healthy diet, being free from pain and low stress are most essential for their well-being

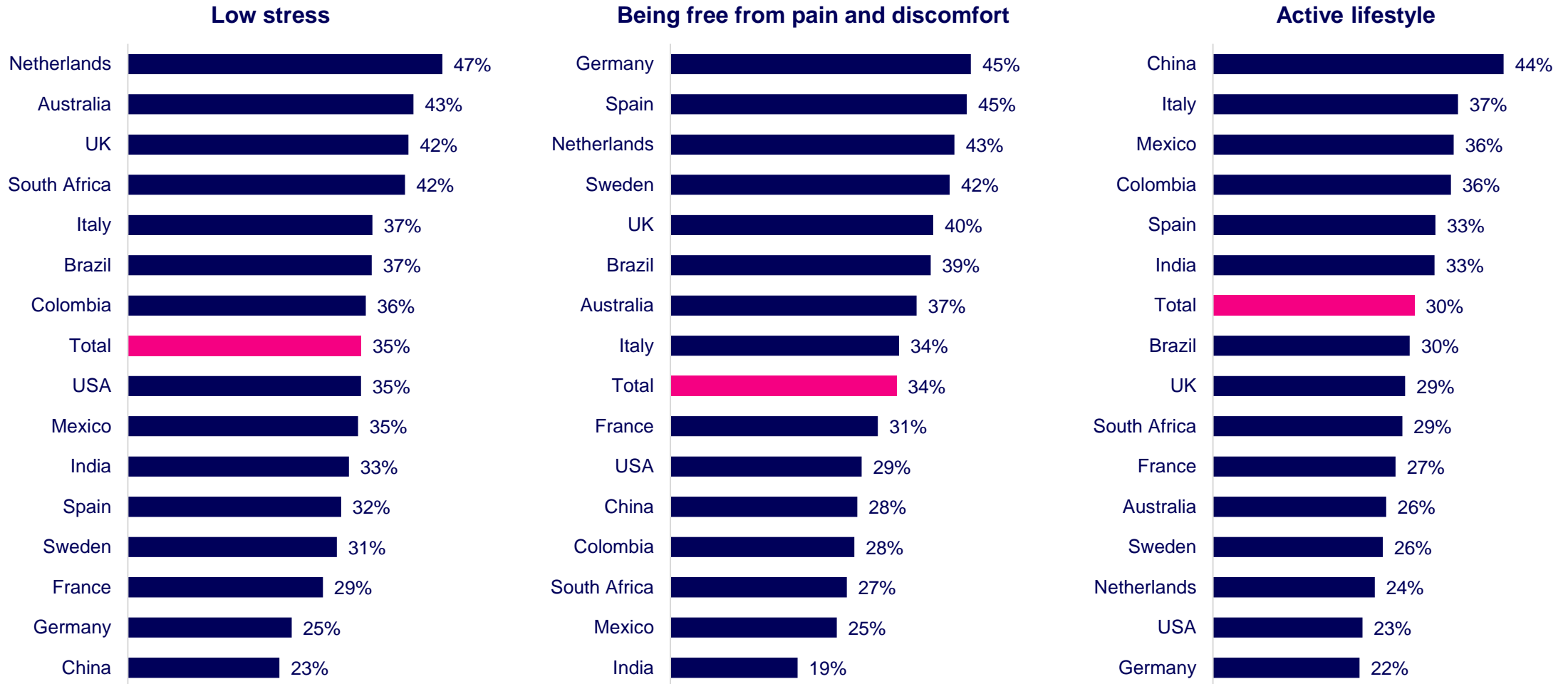
For example, 47% of people experiencing urine leakage say being free from pain and discomfort is most essential for their daily well-being, 44% of people going through a mental health condition say being free from low stress and 43% of people with diabetes say a healthy diet.





# Being free from pain and discomfort is high on the agenda in the European countries

Having an active lifestyle are important in all countries. Low stress is higher on the agenda in Netherlands, Australia and the UK.



# Priorities change through the stages of life – from identity forming to having your basics met

During adolescence you want to focus more on the mental and social aspects of personal well-being. As you enter the next stage of life, adulthood, your priorities change to having an active life filled with activism, work and relationships. Parenthood is about security - in terms of your work-life and financials to ensure low stress and sufficient rest and recovery. Middle age is about wellness, being able to rest and recover, eating healthy and being part of a community. During your senior years, the focus shifts to having your core needs met such as being free from pain and discomfort, not being lonely and having time to rest.



## IDENTITY



## ACTIVE



## SECURITY

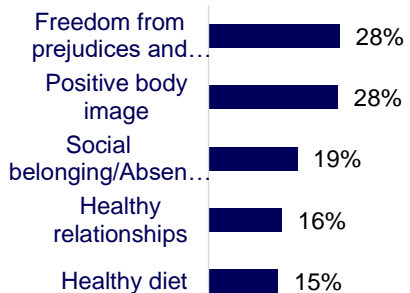


## WELLNESS



## CORE NEEDS

### Adolescent



### Adulthood



### Parenthood



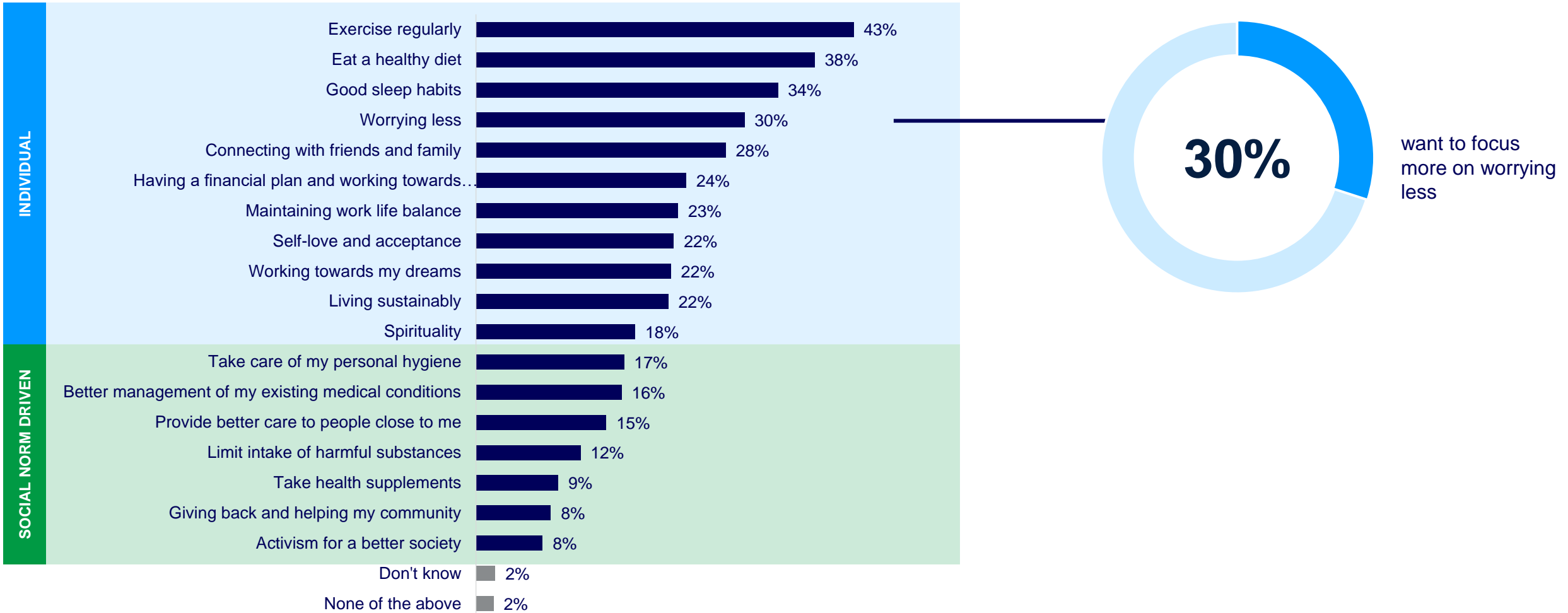
### Middle age



### Senior years



# People mainly want to focus more on exercising regularly, eating a healthy diet and good sleep habits



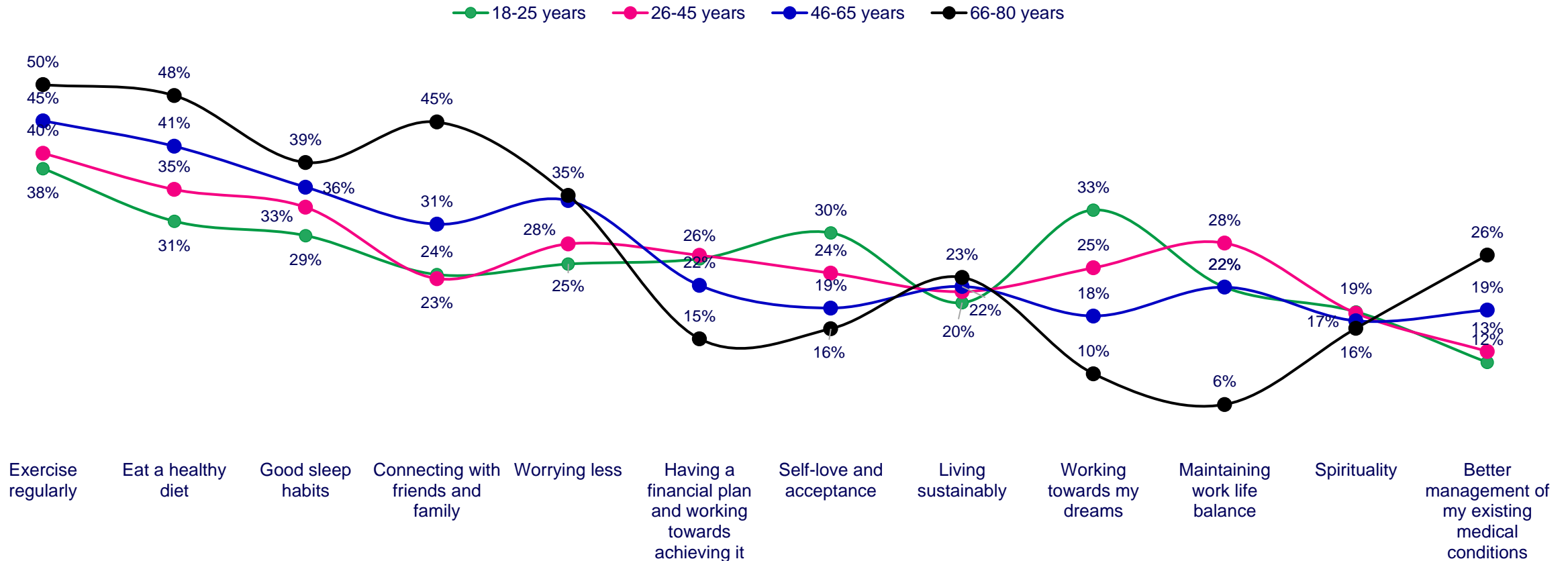
# Females are more focused on improving their mental well-being than men





# Young want to focus more on their dreams, self-love and acceptance – older connecting with friends and family

The older you are the more you want to focus on exercise, diet and sleep.

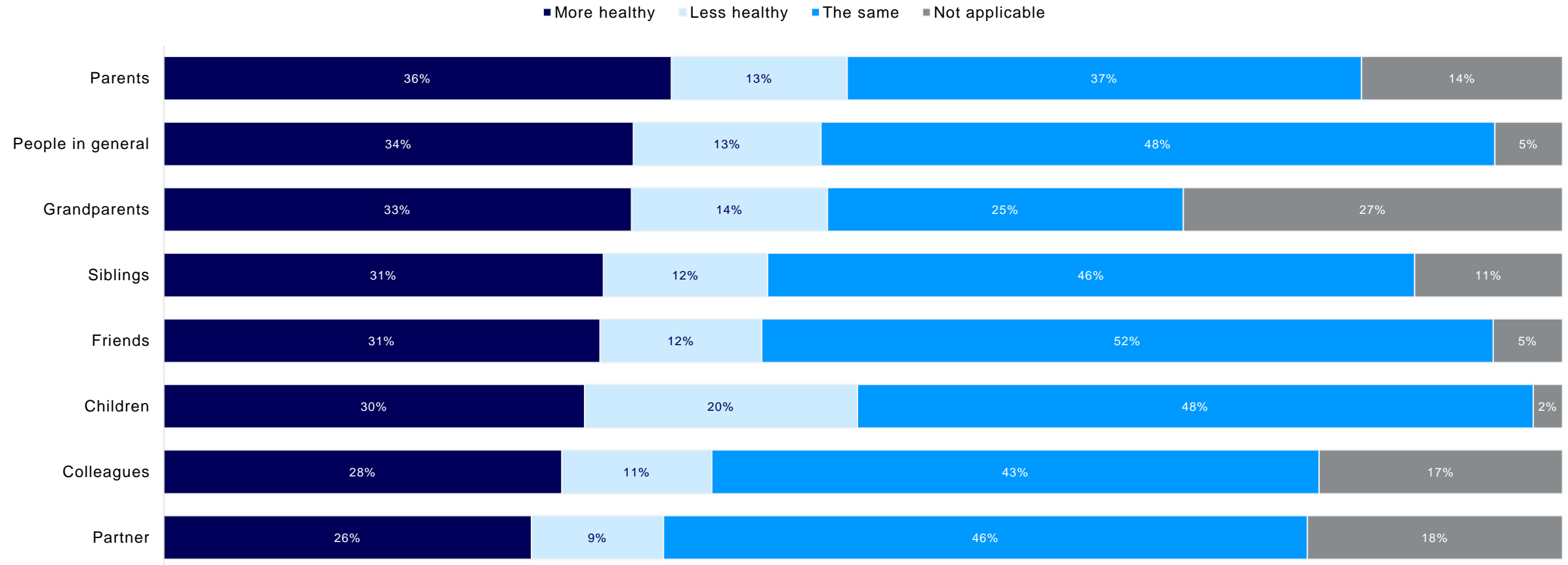


# Personal hygiene is high on the agenda in France, India and Mexico – Worrying less is highest in the European countries

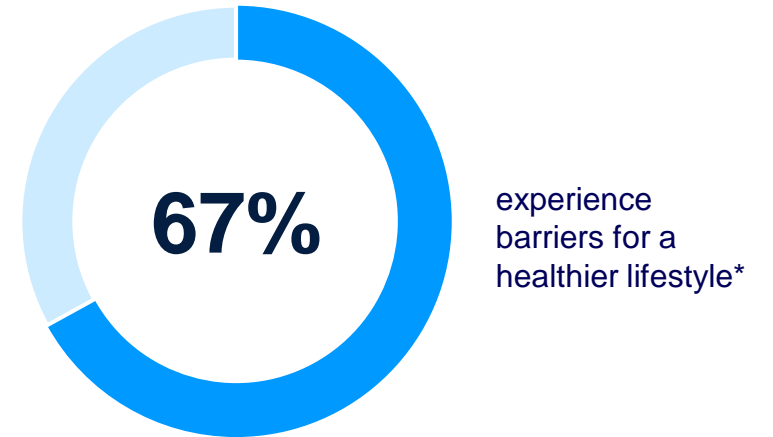
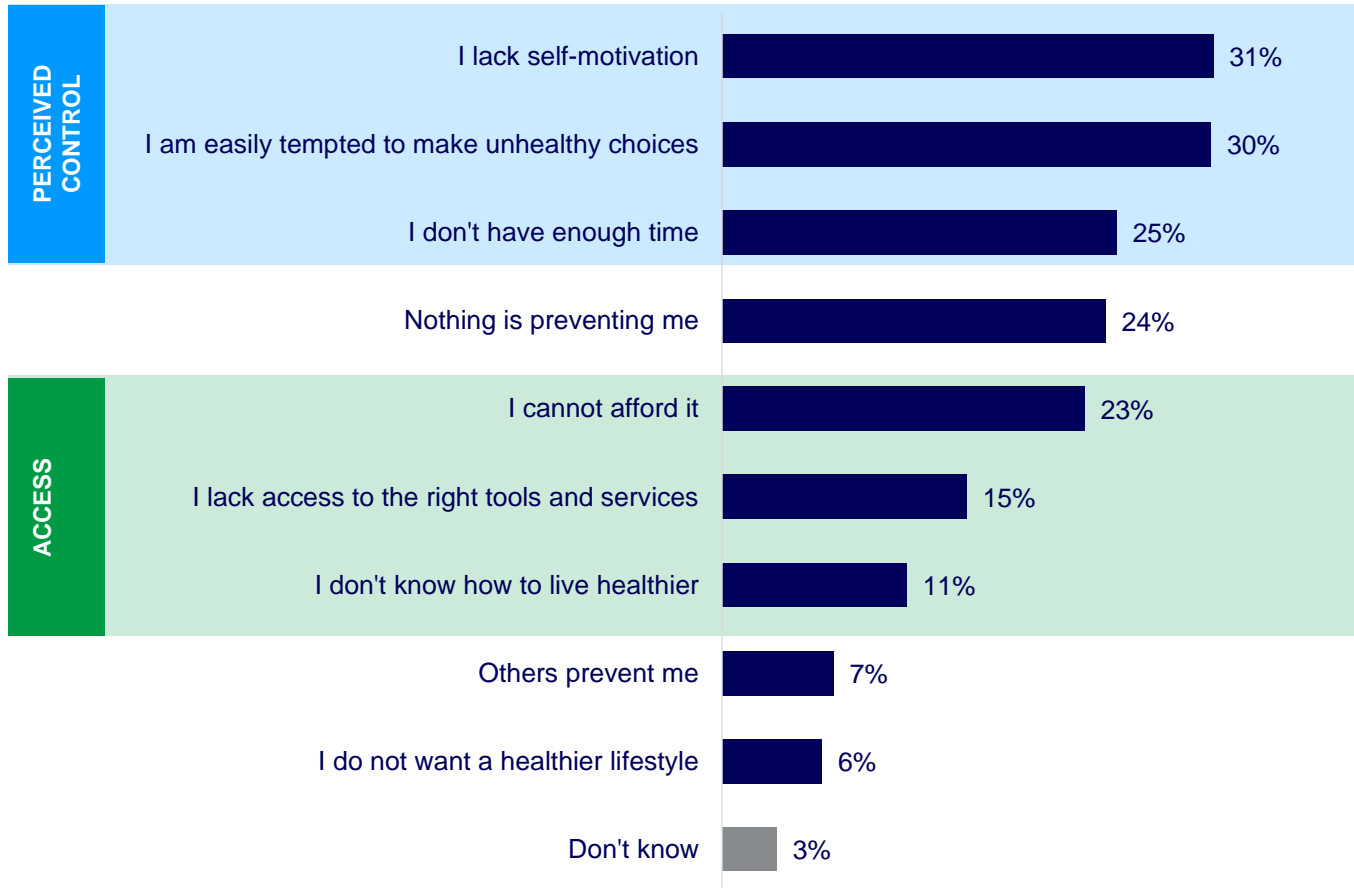


# Overall people believe they are as healthy as others - except in comparison to their parents, where people believe they are more or equally healthy

On average, 31% think they are healthier than people close to them, such as their siblings, parents, friends or people in general.

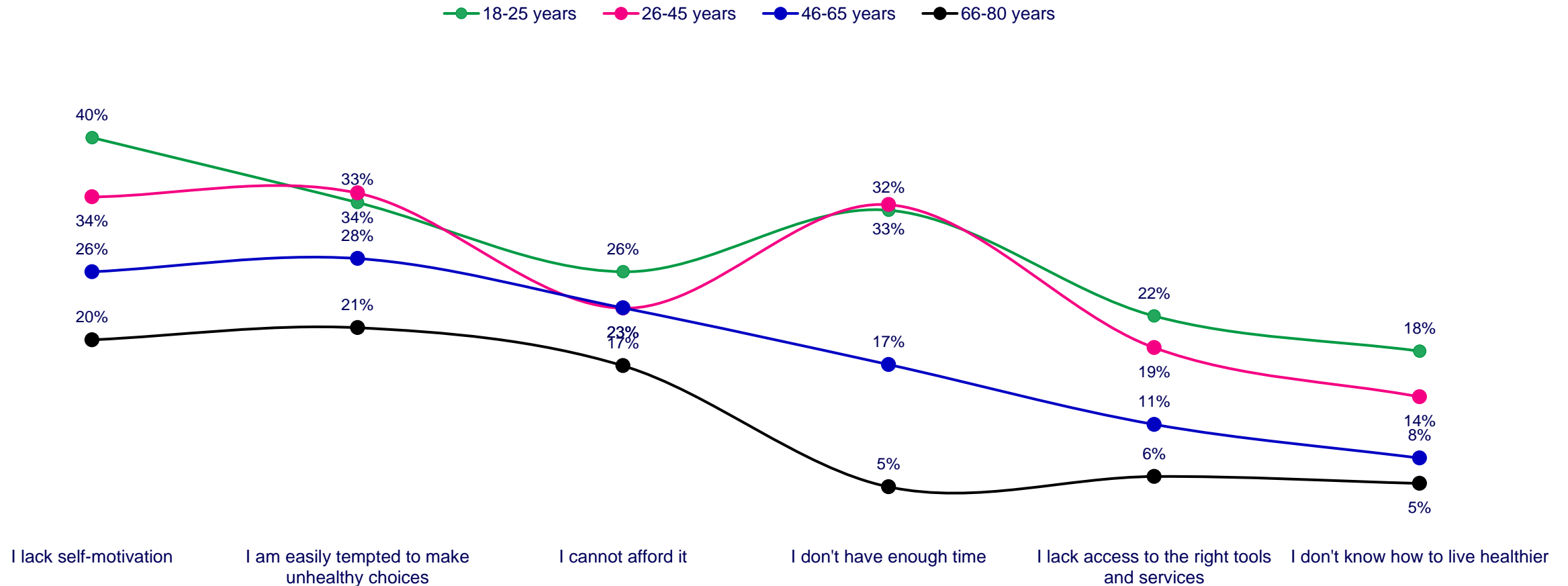


# Self-motivation is the main barrier to living healthier followed by self-control and time



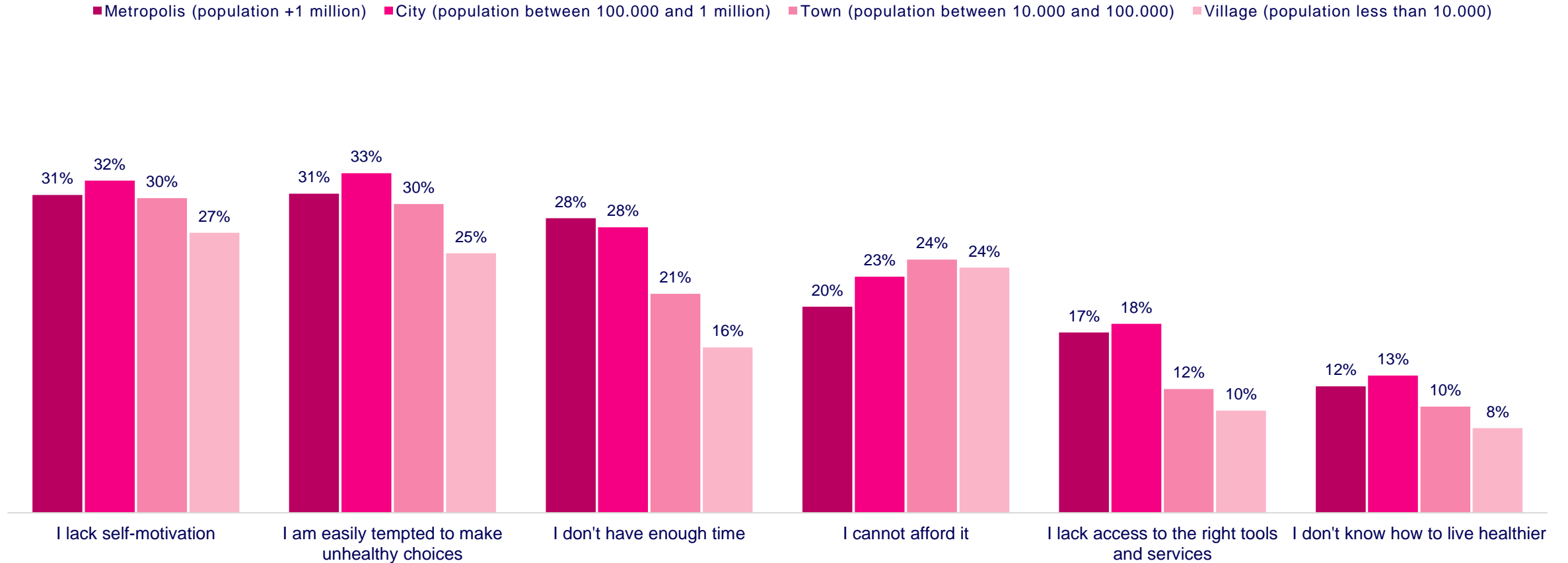


# The younger you are the more likely you are to say that you experience barriers towards a healthier lifestyle

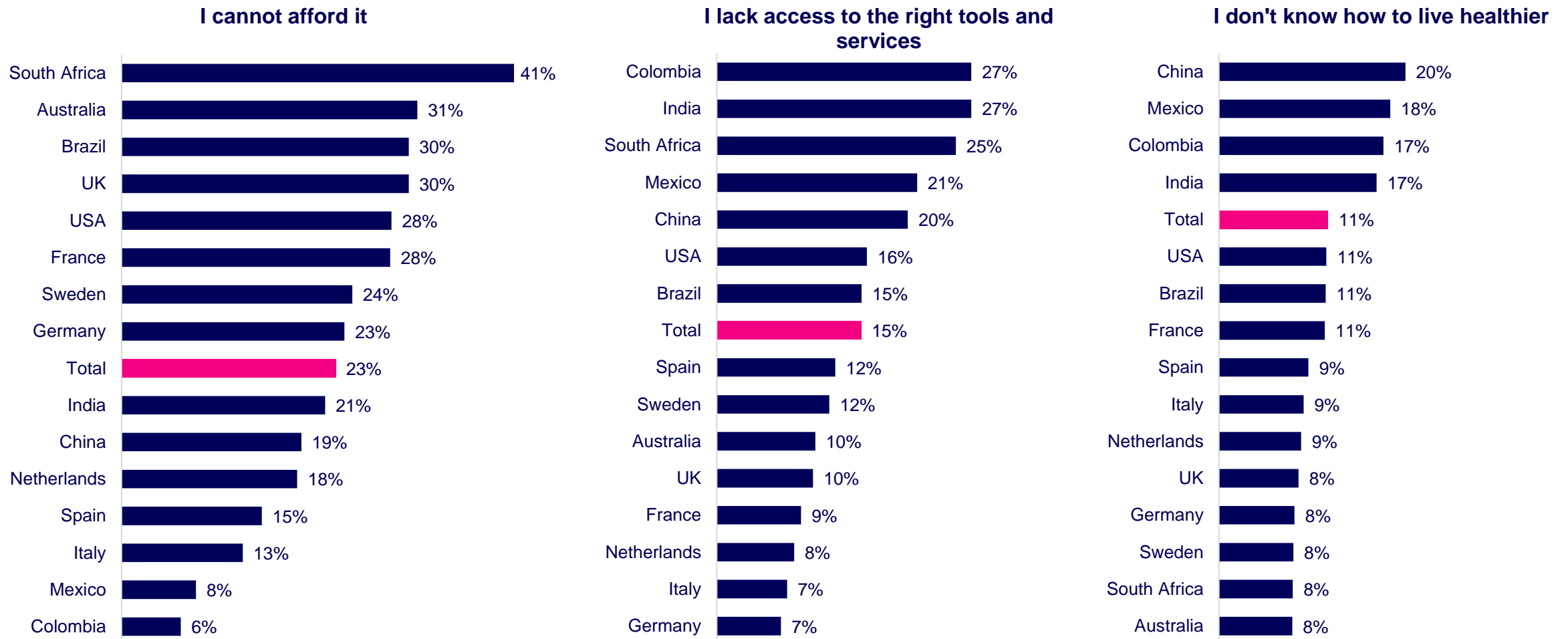


# Self-control is a barrier in urban areas, whereas affordability is an issue in rural areas

Access and information are also surprisingly bigger barriers in urban areas compared to rural areas.

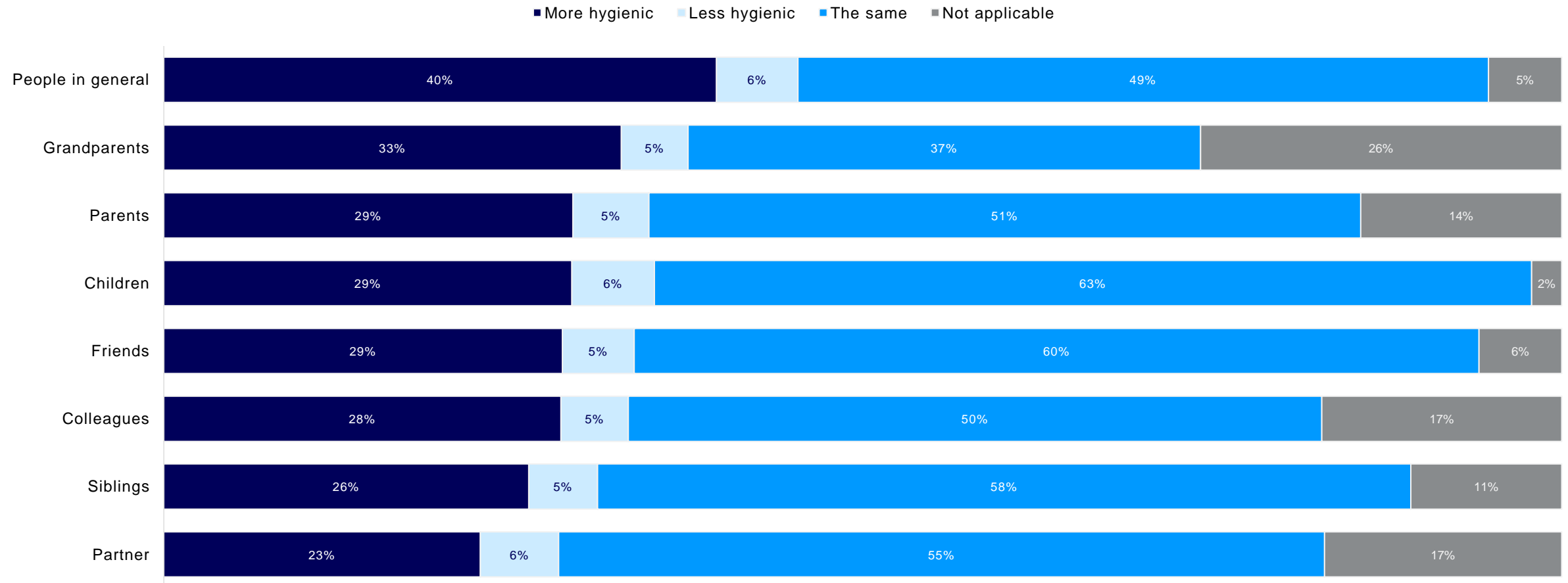


# Affordability is a large issue in most countries – Especially in South Africa, Australia and Brazil



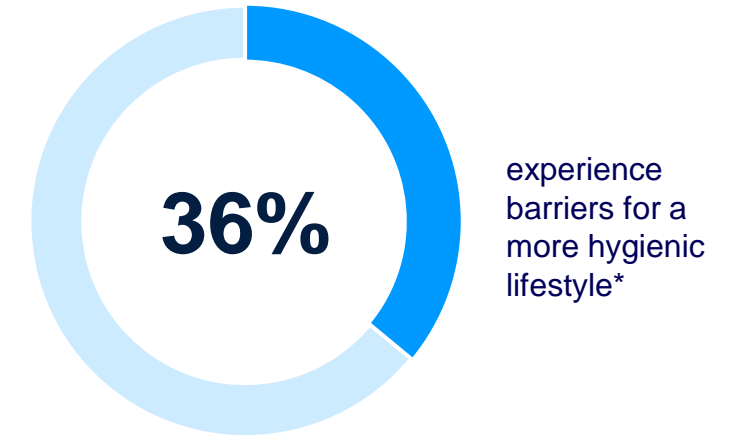
# 2 in 5 believe they are more hygienic than people in general, even though half believe they are as hygienic

On average, 29% think they more hygienic than people close to them, such as their siblings, parents, friends or people in general.

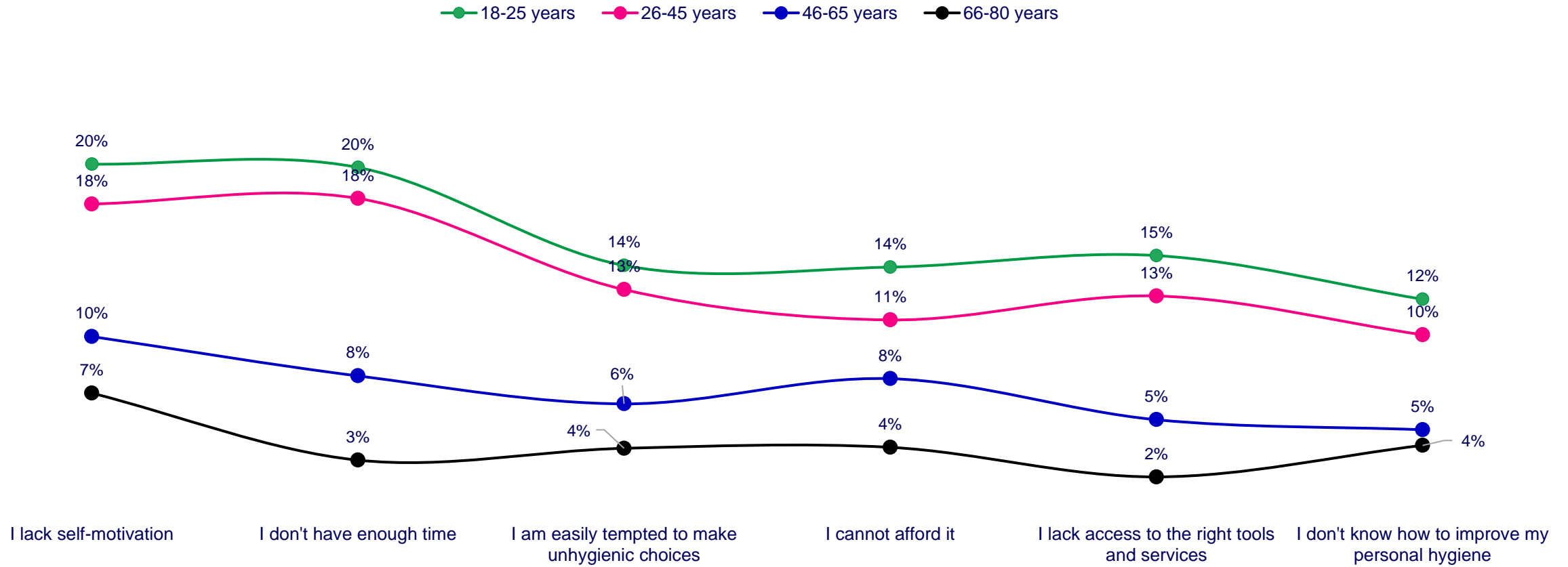




# 1 in 3 experience barriers to better personal hygiene – the main barrier is lack of self-motivation

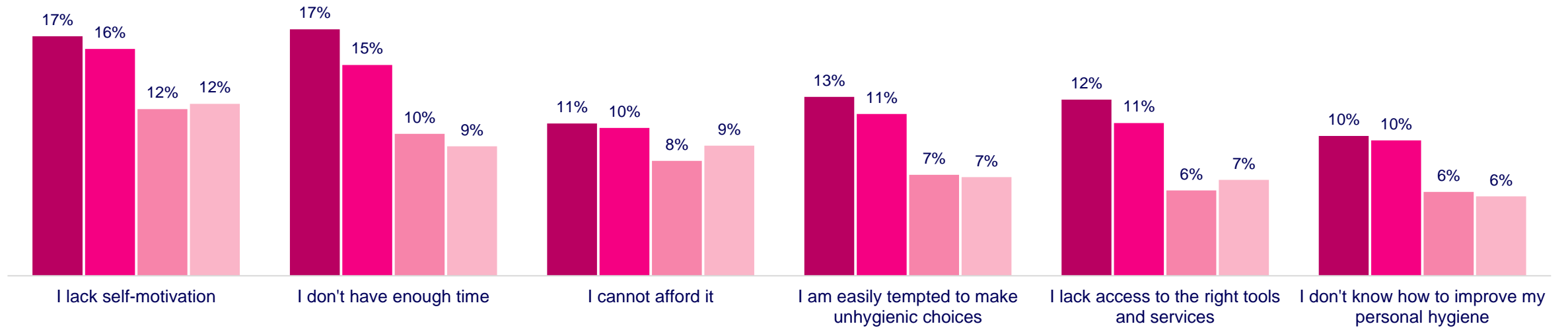


# Younger individuals are more likely to say they experience barriers to having better personal hygiene

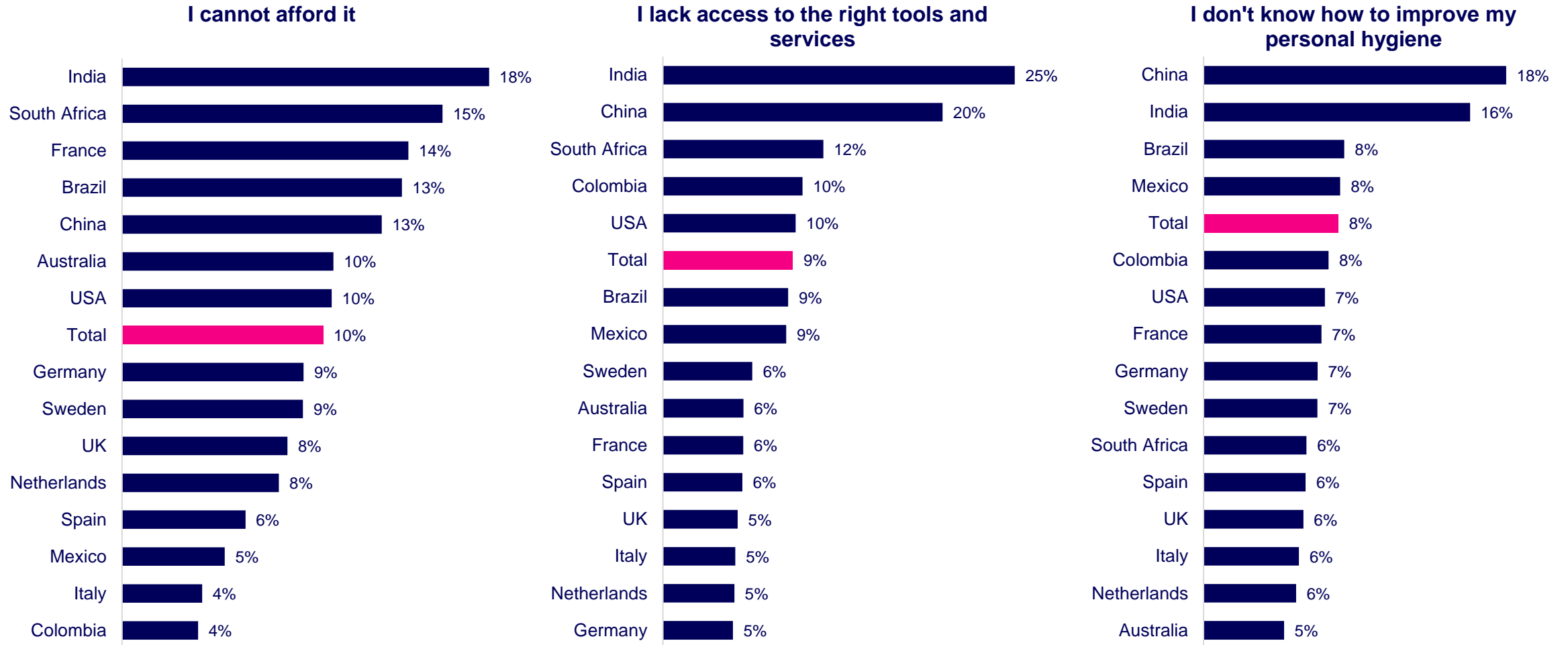


# People in urban areas are likely to say they experience more barriers across the board

■ Metropolis (population +1 million) ■ City (population between 100.000 and 1 million) ■ Town (population between 10.000 and 100.000) ■ Village (population less than 10.000)



# Affordability, access and knowledge are a large concern in India and China





# FUTURE PERSONAL CARE

## Key Highlights



**34%**

say that being free from pain and discomfort is most essential to their daily well-being. An active, individual lifestyle is more integral to well-being than communal factors.



**30%**

want to focus on worrying less for well-being in the future. The young want to focus more on their dreams, self-love and acceptance while the older focus on connecting with friends and family.



**67%**

say they experience a barrier to living healthier. Time and motivation, followed by access to tools and information are the biggest barriers.



**36%**

say they experience a barrier to better hygiene. Motivation and time followed by access to tools and information are the biggest barriers.

## Contextual Summary

**Our lifestyles and environment are changing, and so are the support systems we need to be well – physically and mentally.**

We are constantly evolving and as a result our body doesn't look, feel, or react as it used to. We want to nourish both our physical and mental needs to always be as healthy as we can - through all our life stages. However, our lifestyles are creating new needs that we haven't met before. Needs that set new demands on our well-being and the support we need.

Beyond basic needs of safety, food and sanitation - people are turning inwards to prioritize individual well-being before the communal aspects of well-being such as a sense of belonging and activism. The focus of well-being shifts from personal identity in adolescence to core needs such as being free from pain and discomfort as you get older. The worries of an uncertain world weigh heavy on people's minds and most cite lack of time and motivation to live healthier and hygienic lives.

# Future Hygiene Dialogue

3

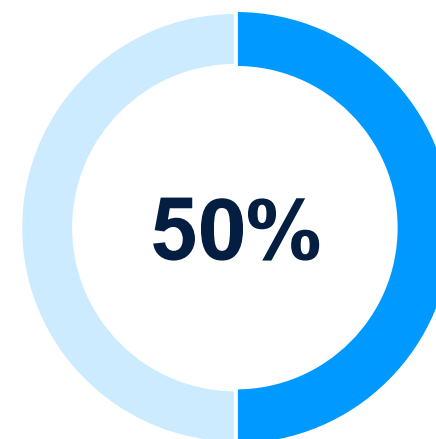
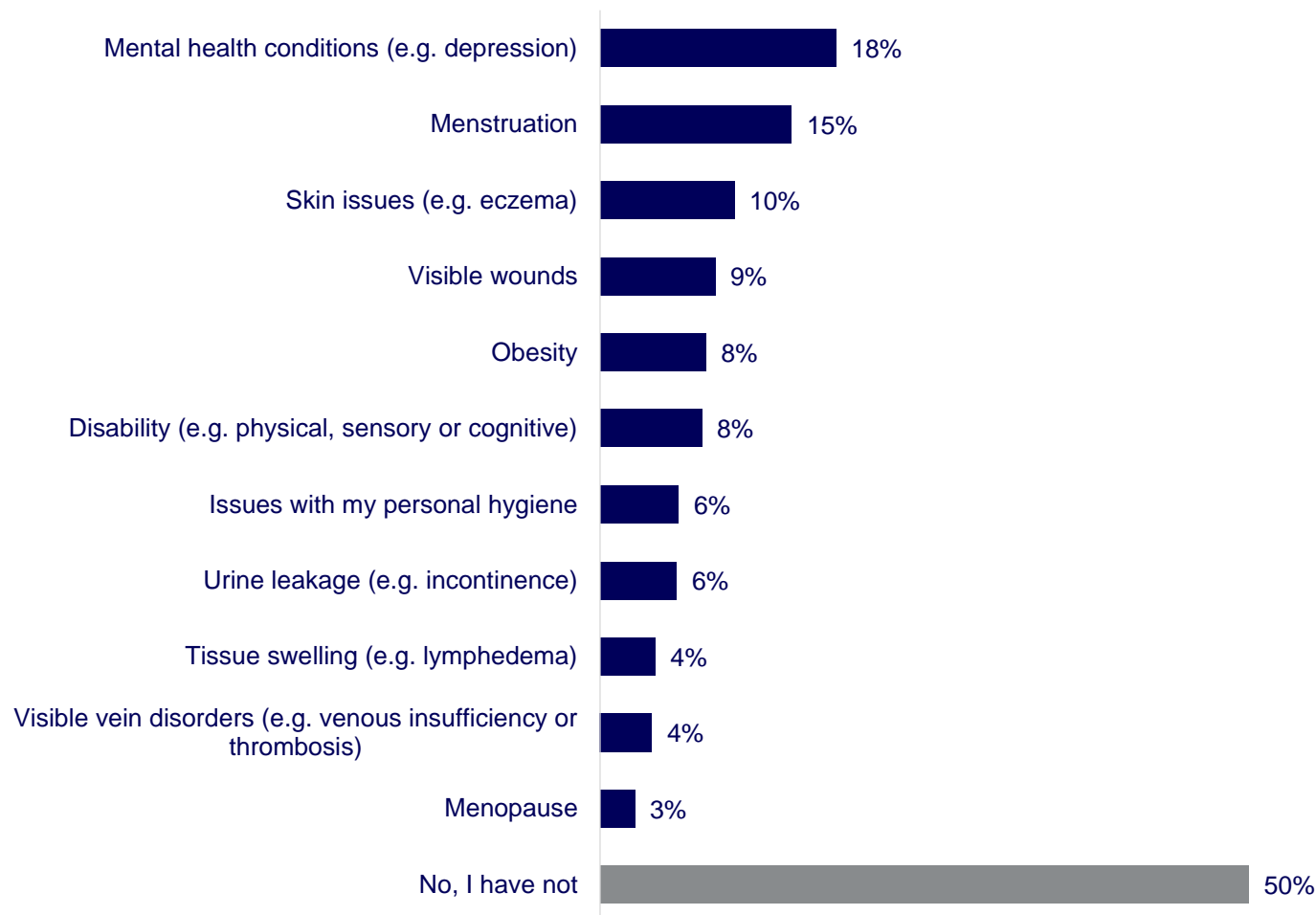
A group of eight school children, four boys and four girls, are walking in a line outdoors. They are wearing white shirts, dark ties, and dark trousers or skirts. The background shows a brick building and some greenery. The image is dimmed to allow text to be overlaid.

# 45%

say schools creating spaces for dialogue and education are necessary to reduce the shame and reluctance to discuss health and hygiene areas

# Almost 1 in 5 have missed a day of school or work due to their mental health condition

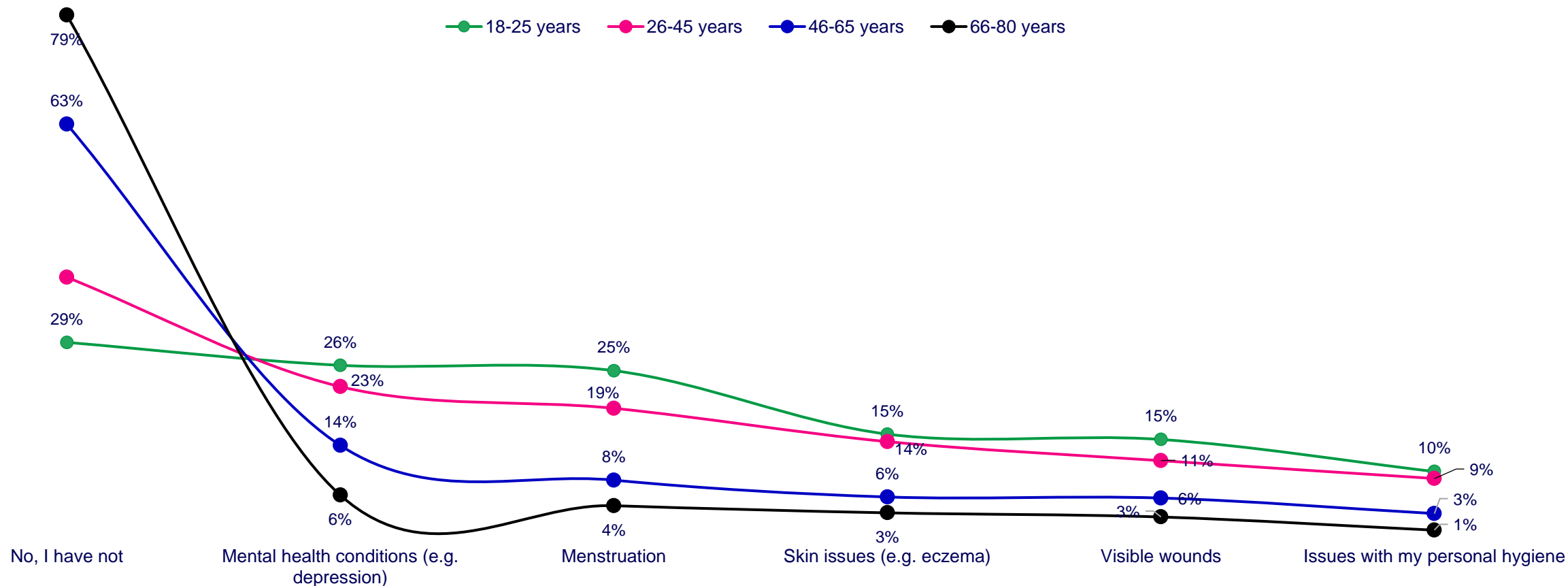
Overall, 1 in 2 have missed a day or more due to any of the following. 1 in 5 people have missed a day of school or work due to menstruation or menopause.



have missed day of school or work due to one or more health or hygiene reasons\*

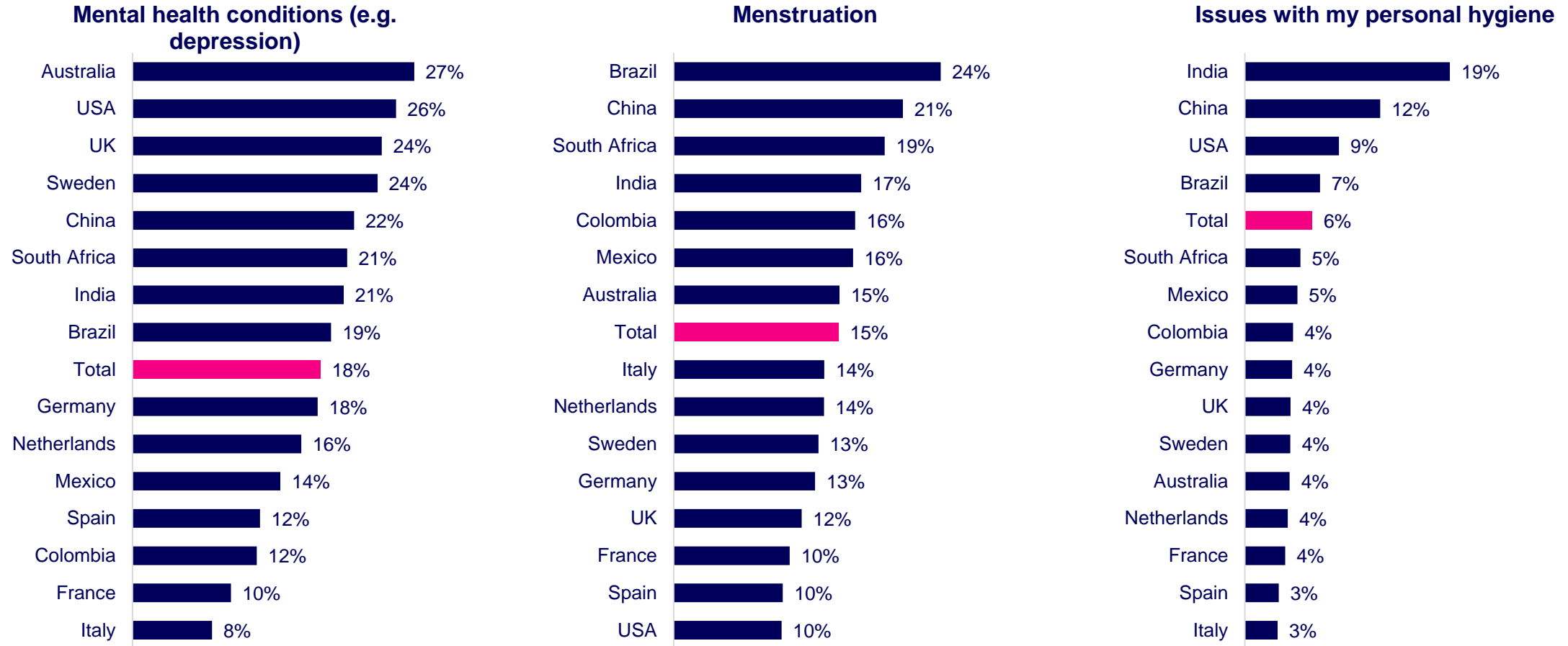


# The younger are more likely to miss a day of school or work due to underlying health or hygiene issues



# Brazil and China are more likely to miss day of school or work due to menstruation

1 in 4 are likely to be absent due to mental health issues in Australia, USA, UK, and Sweden



# Strong taboo around menstruation, urine leakage and mental health issues

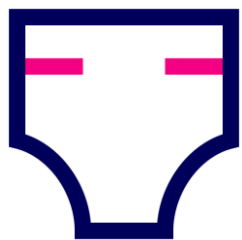
Body weight and mental health issues are controversial topics with positive or negative behavior.

Highest (3)

		Menstruation	Menopause	Urine leakage	Personal hygiene issues	Old-age	Body weight issues	Mental health issues	Disability
Positive	I would stop a friend/family member if they made fun of someone with	28%	26%	34%	30%	34%	43%	45%	44%
	I actively try to inform myself more about	15%	15%	15%	19%	20%	30%	34%	15%
	I actively try to help people who have	13%	9%	10%	17%	26%	22%	30%	26%
	I actively try to educate others about	13%	9%	9%	20%	13%	23%	25%	13%
Negative	I avoid talking about	13%	10%	15%	11%	8%	12%	13%	8%
	I have made funny comments about someone with	6%	6%	6%	11%	8%	13%	7%	4%

# 1 in 4 with urine leakage avoid talking about it

1 in 5 who say they are obese avoid talking about body weight issues.



**23%**

with urine leakage  
avoid talking about  
urine leakage



**18%**

experiencing obesity  
avoid talking about  
body weight issues



**17%**

experiencing mental  
health conditions avoid  
talking about mental  
health issues



**11%**

who menstruate avoid  
talking about  
menstruation

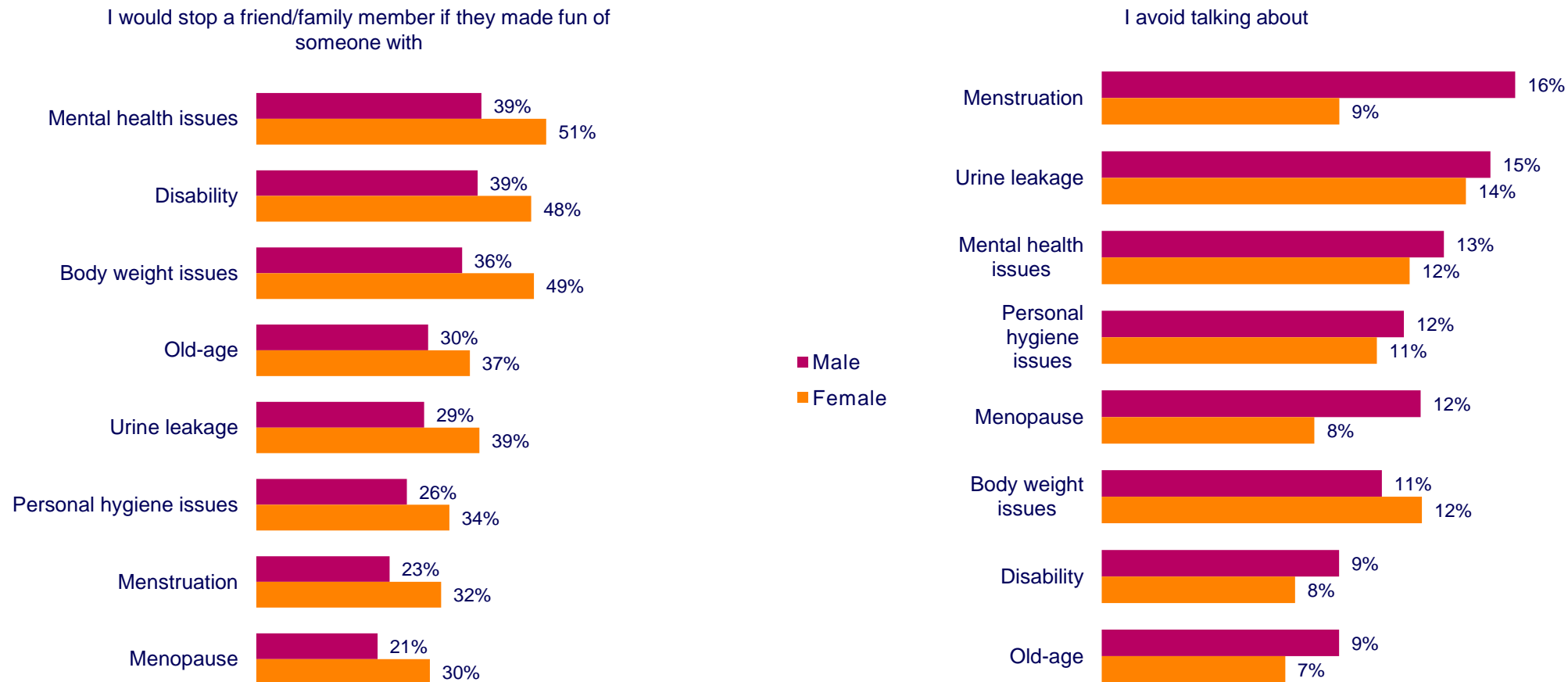


**10%**

going through  
menopause avoid  
talking about  
menopause

# Women are more likely to stop someone making a funny comment about health and hygiene issues

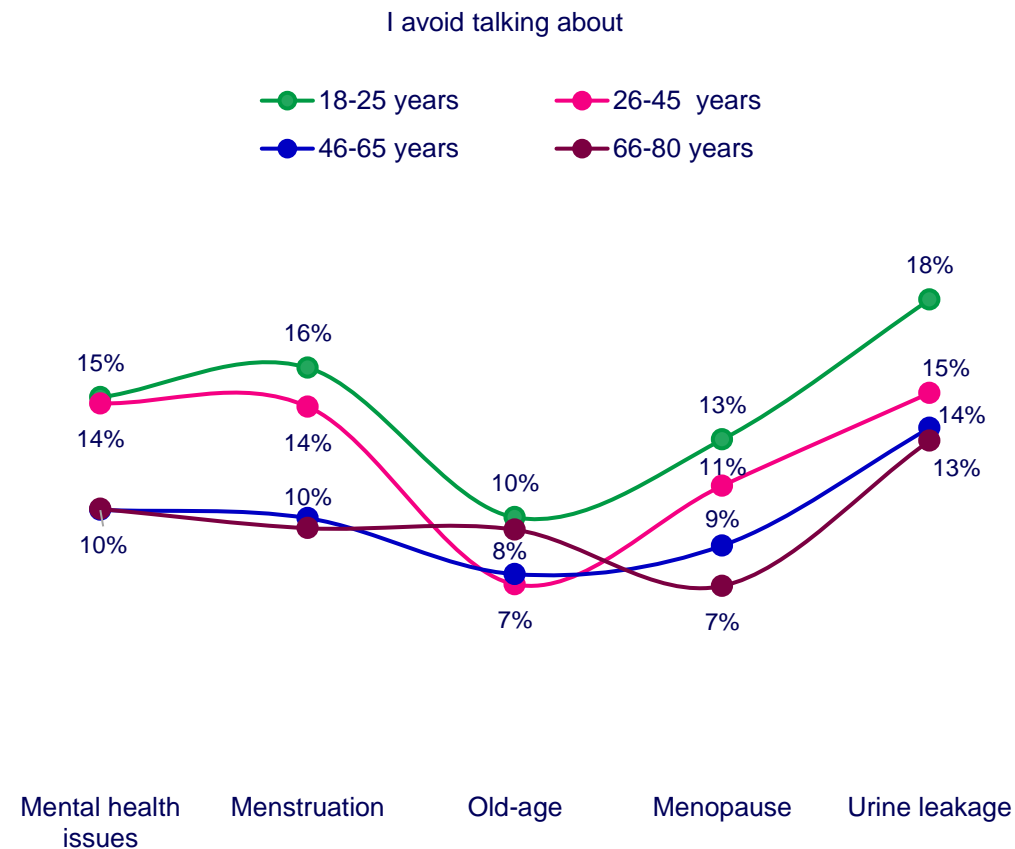
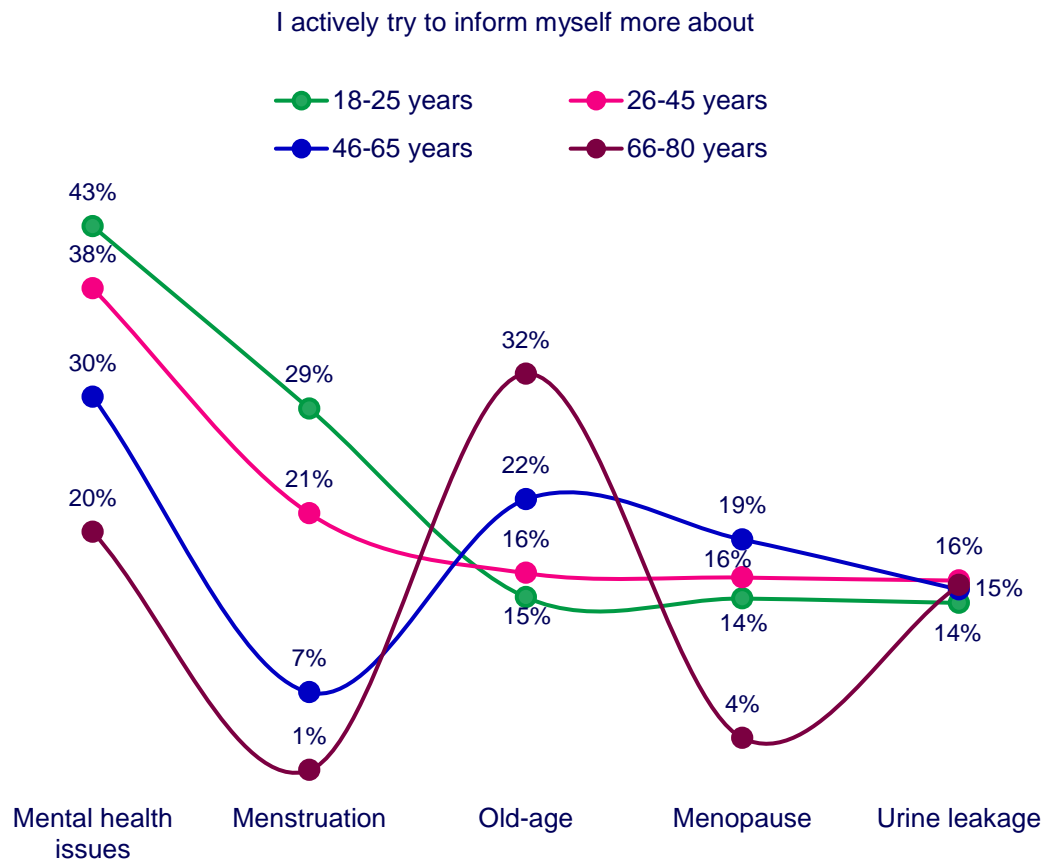
Men avoid talking about all listed topics more than women – except body weight issues.





# People want to learn more about conditions that they are likely to experience at their current age

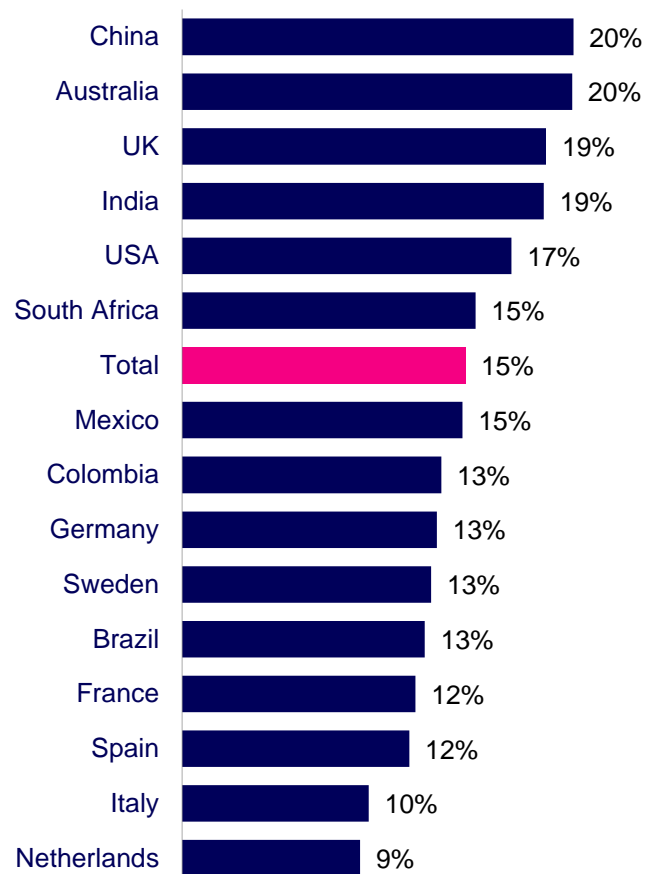
Young avoid talking about health conditions more than elders.



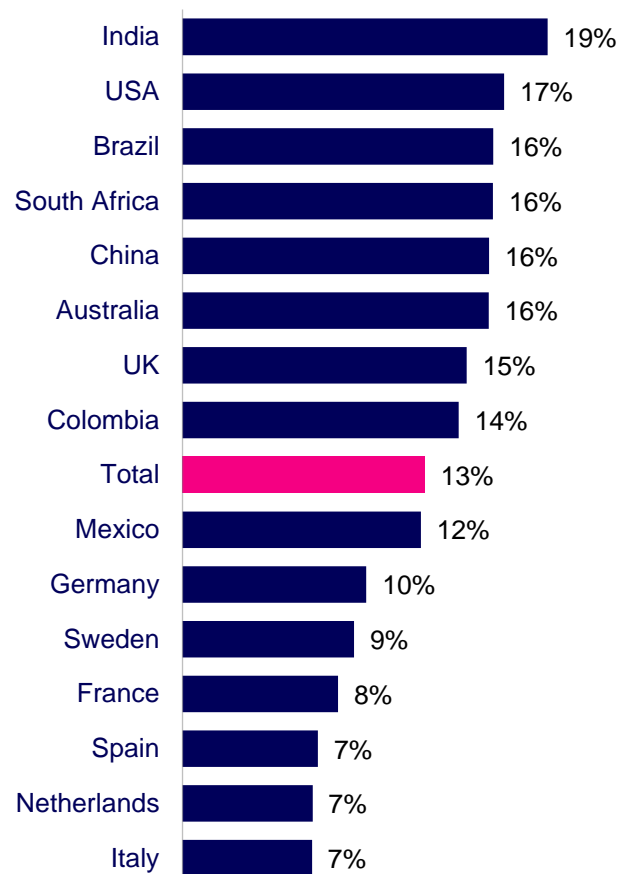
# Urine leakage and menopause are more of a taboo in China and Australia than other markets

Menstruation is a sensitive topic in India, USA and Brazil.

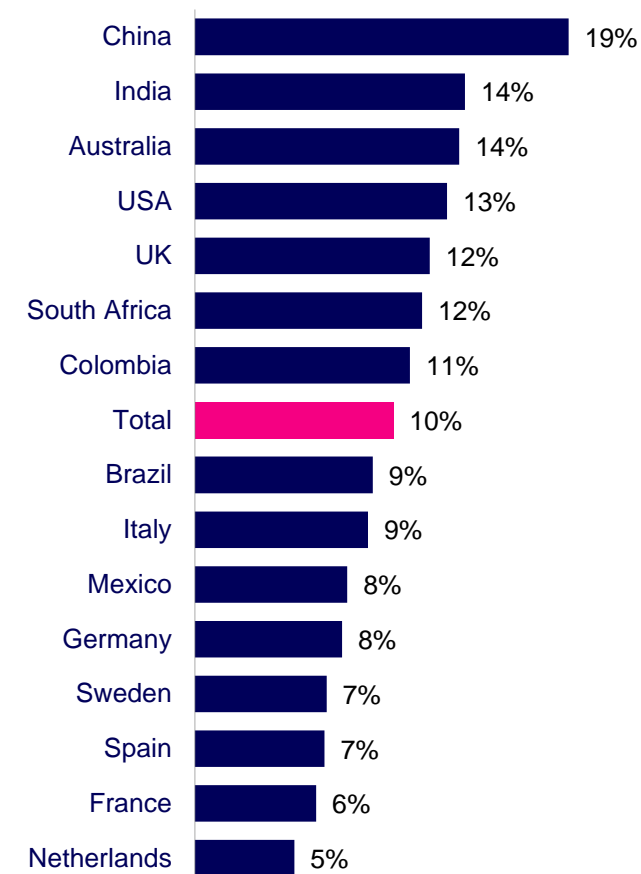
**Avoid talking about urine leakage**



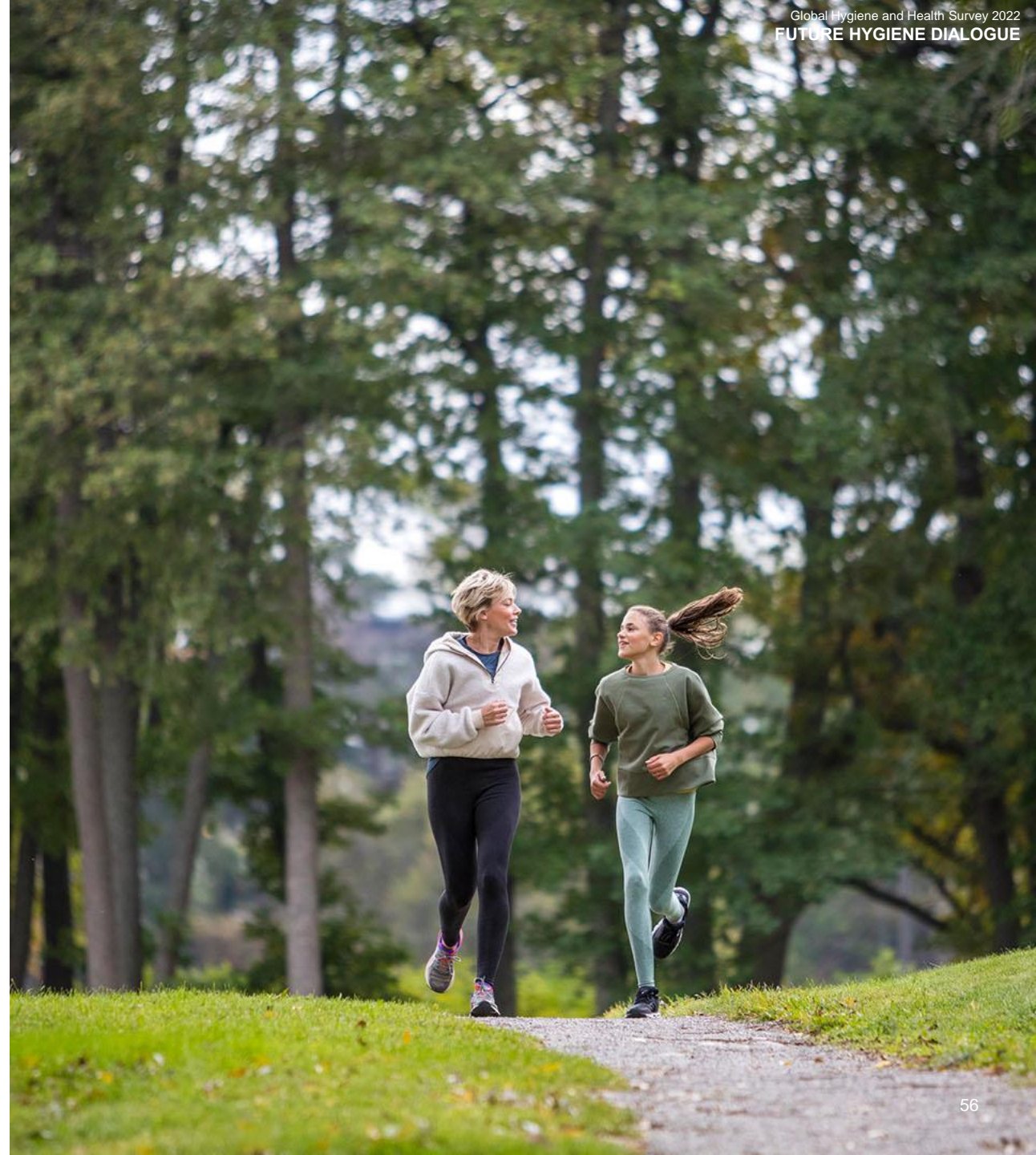
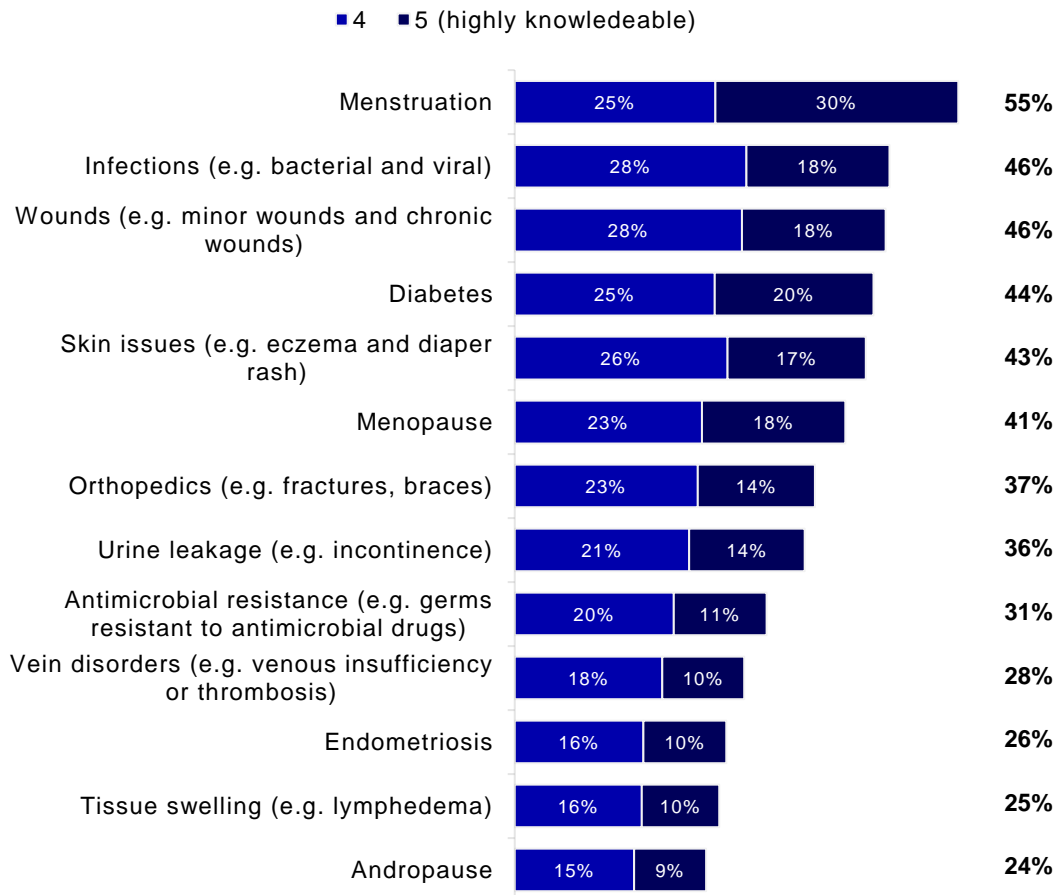
**Avoid talking about menstruation**



**Avoid talking about menopause**

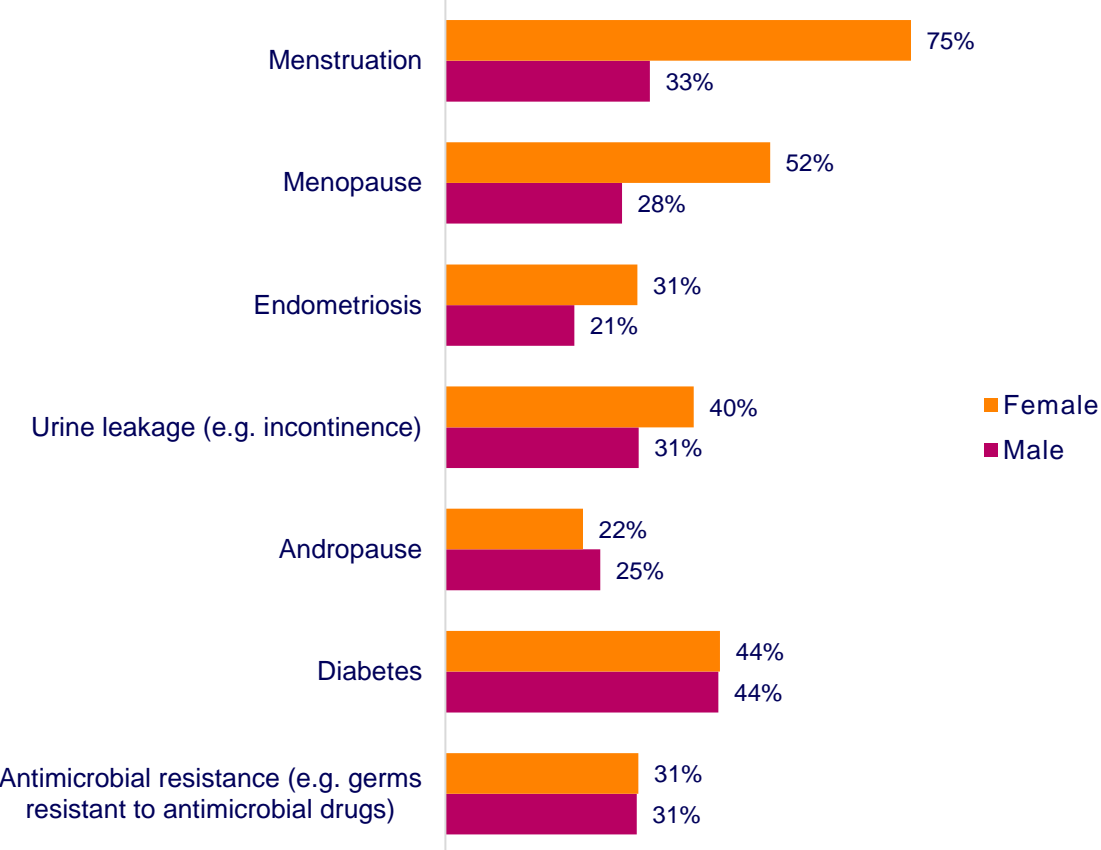


# People say that they are the most knowledgeable about menstruation and infections



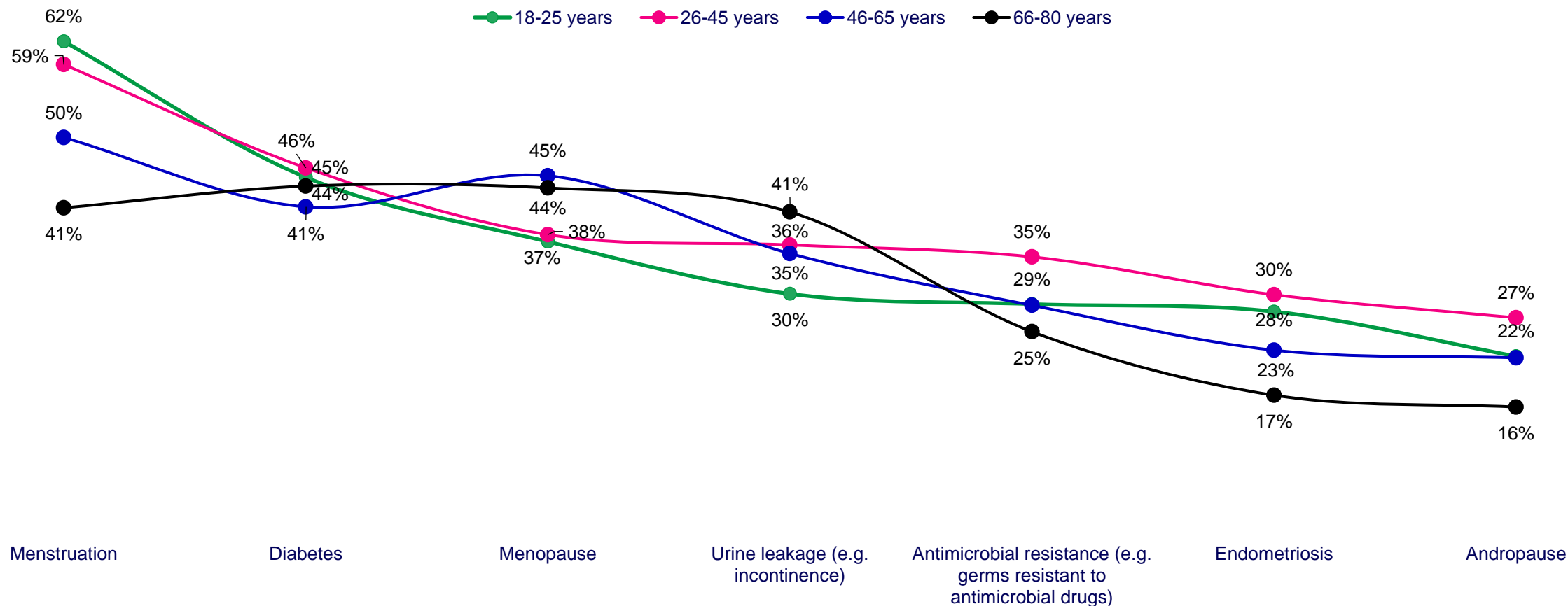


# There is still a big knowledge gap among men when it comes to feminine care and incontinence



# Least knowledge gap between age groups when it comes to diabetes, menopause and antimicrobial resistance

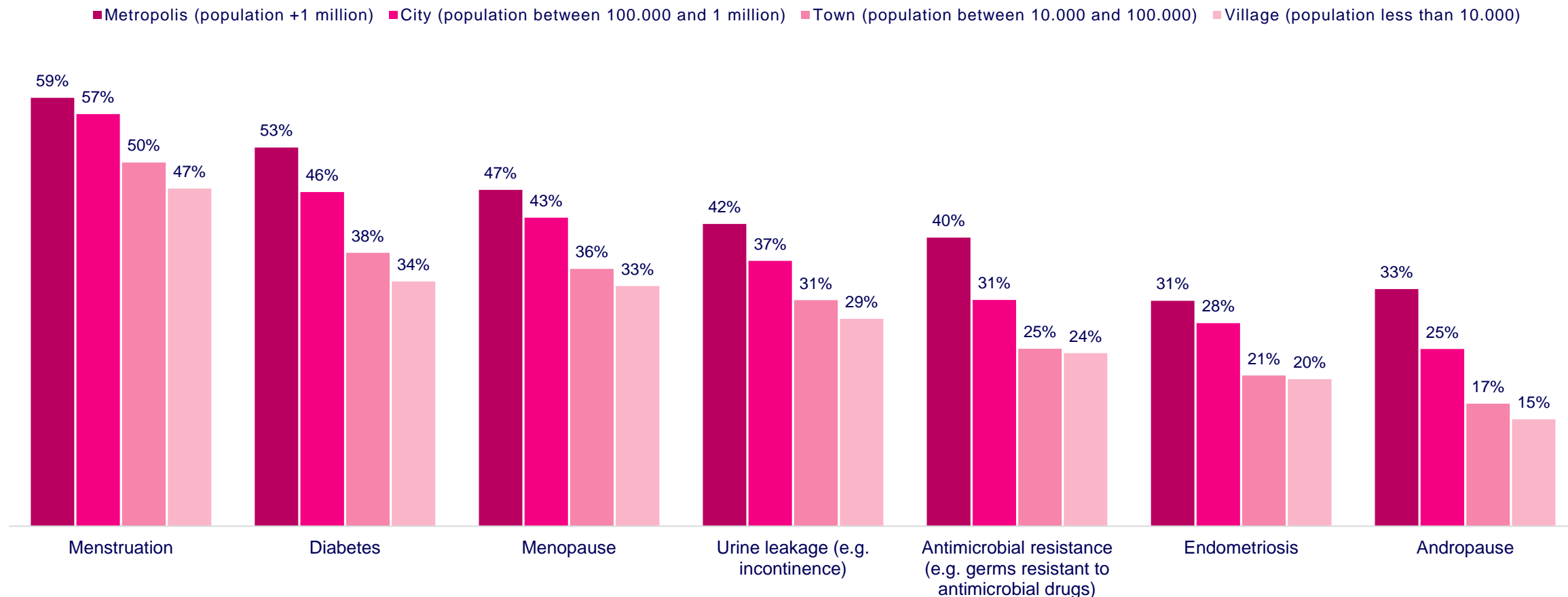
Older report that they are more knowledgeable about urine leakage, while younger are more knowledgeable about menstruation and endometriosis.





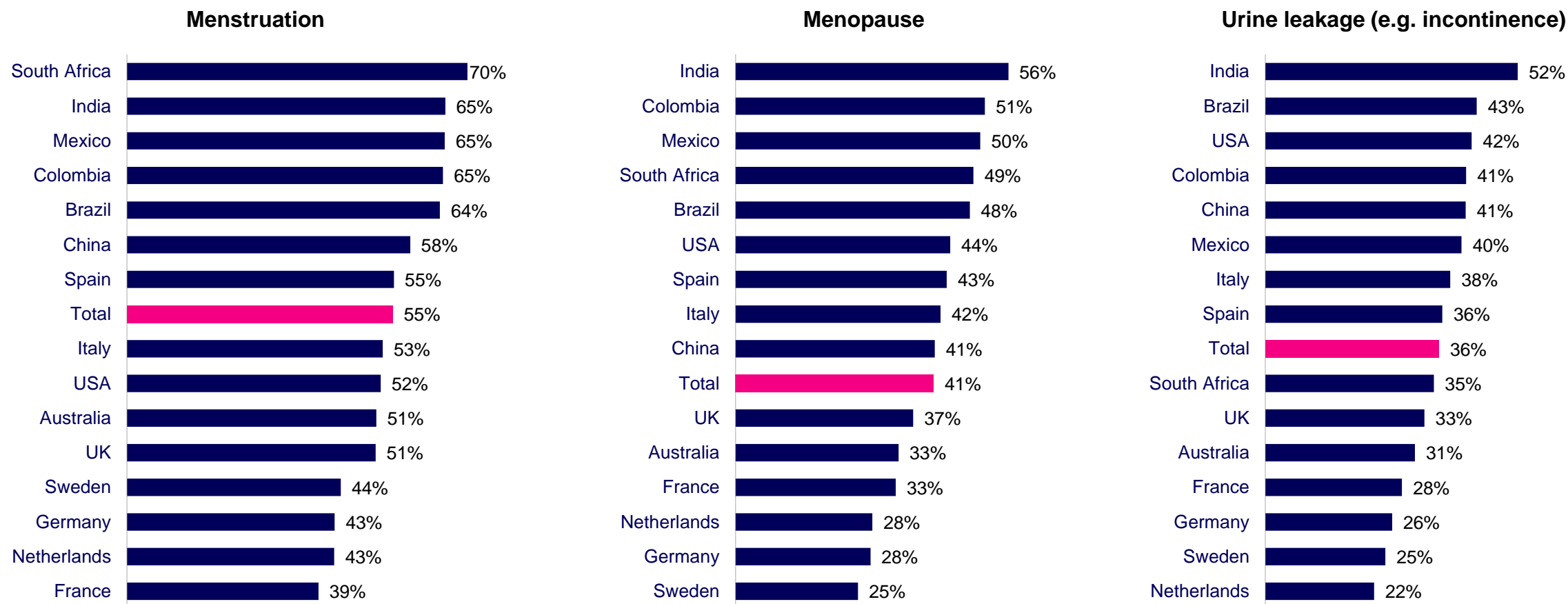
# People in urban areas report higher knowledge across all health and hygiene areas

Largest knowledge gap when it comes to AMR, diabetes and andropause.



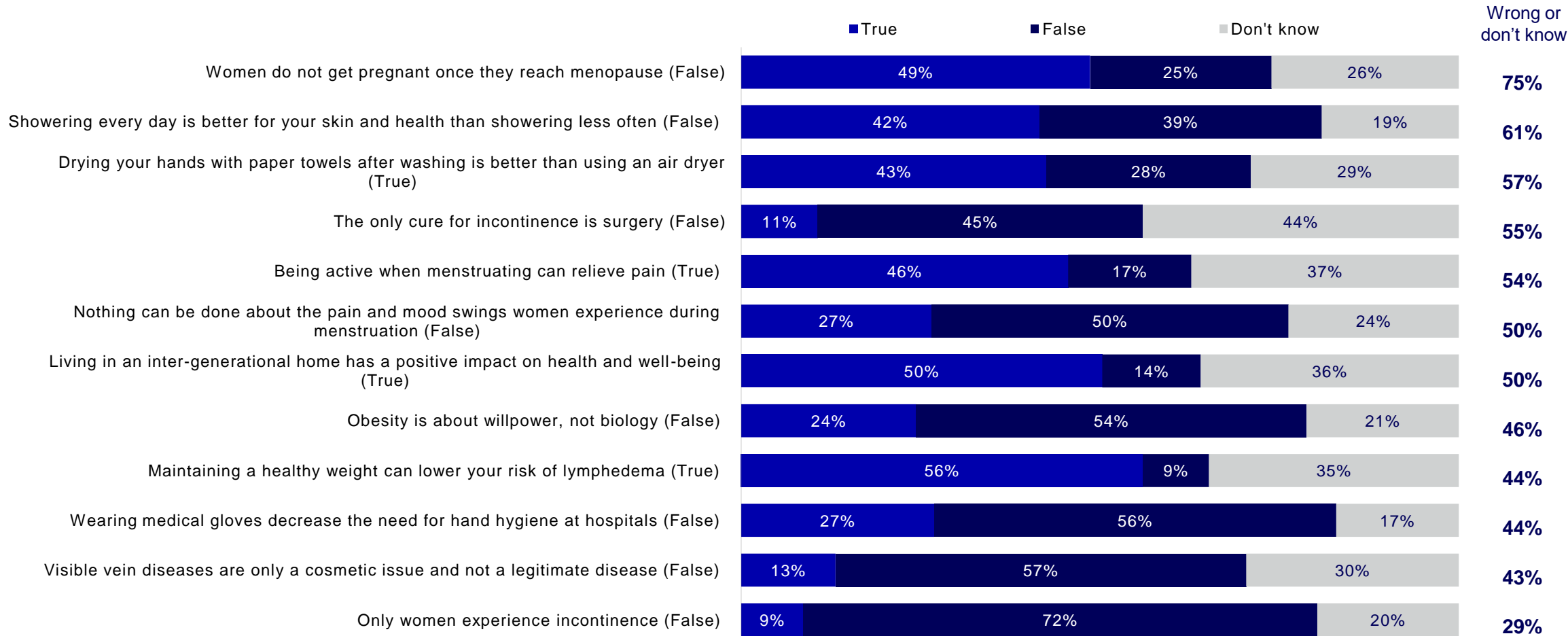
# Self-reported levels of knowledge about menstruation, menopause and urine leakage are high in India

Lowest self-reported levels are in Sweden, France, Germany and Netherlands



# Myths that are most prevalent regarding menopause, daily hygiene and incontinence

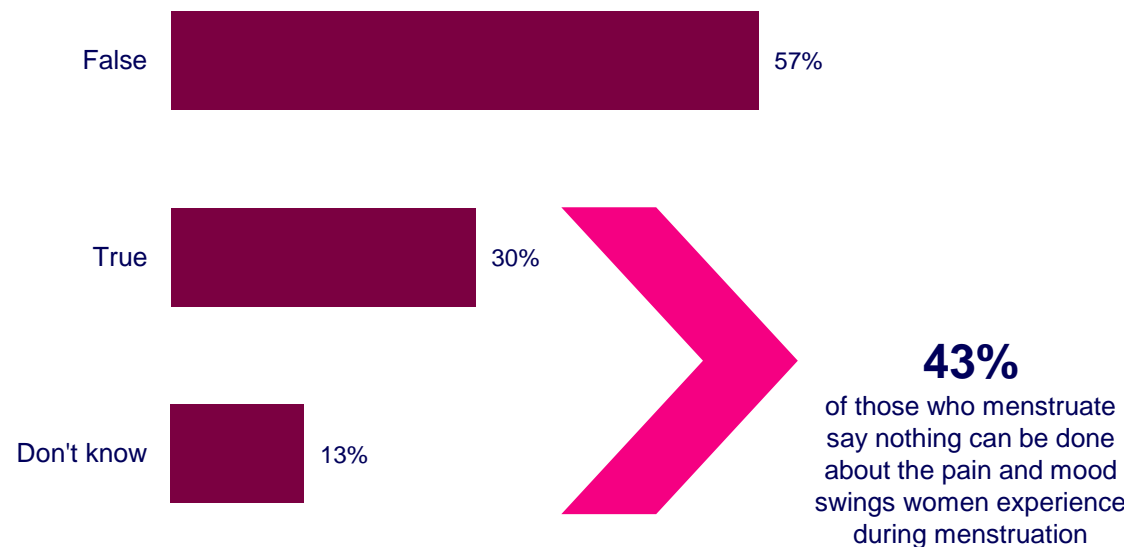
**51%**  
answered wrong  
or do not know  
on average



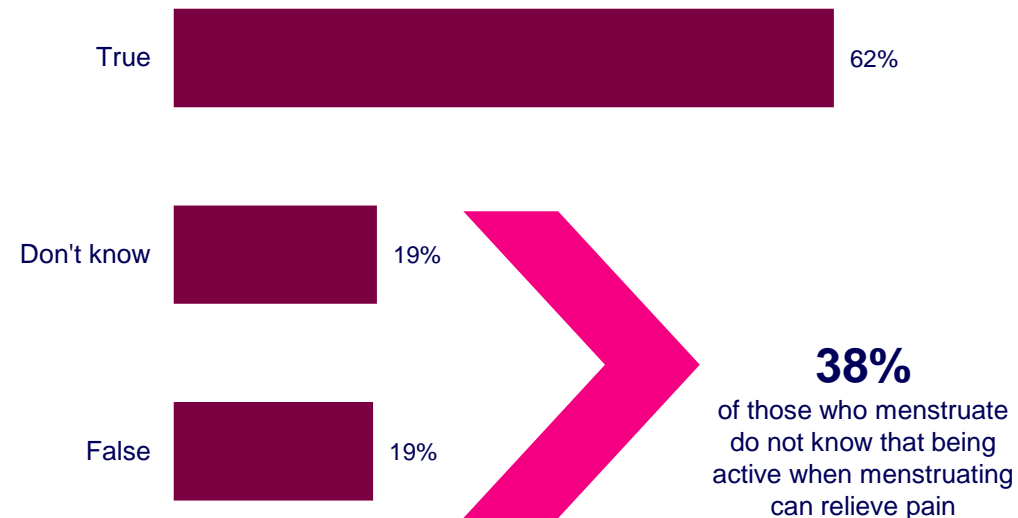
# 2 in 5 who menstruate say nothing can be done about the pain and mood swings during menstruation

2 in 5 menstruating people do not know that being active when menstruating can relieve pain.

Nothing can be done about the pain and mood swings women experience during menstruation (False)



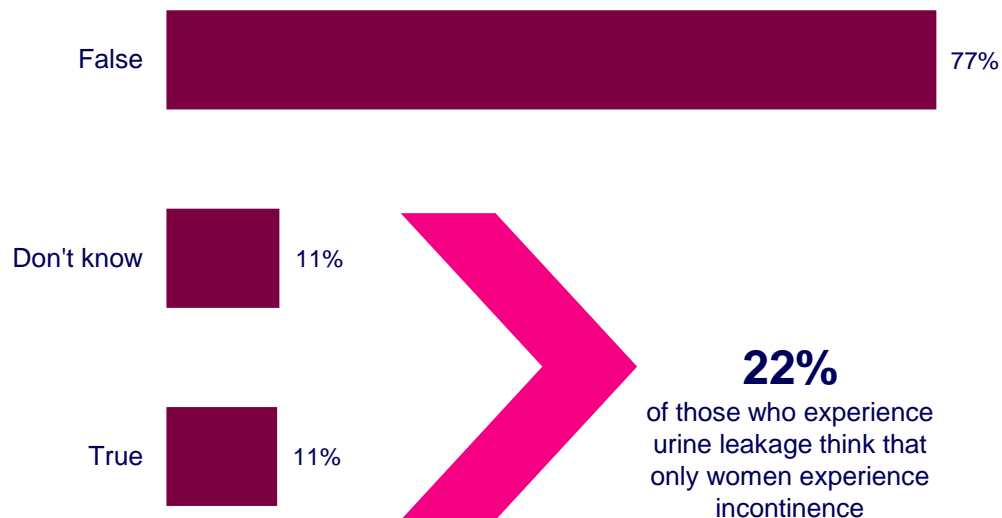
Being active when menstruating can relieve pain (True)



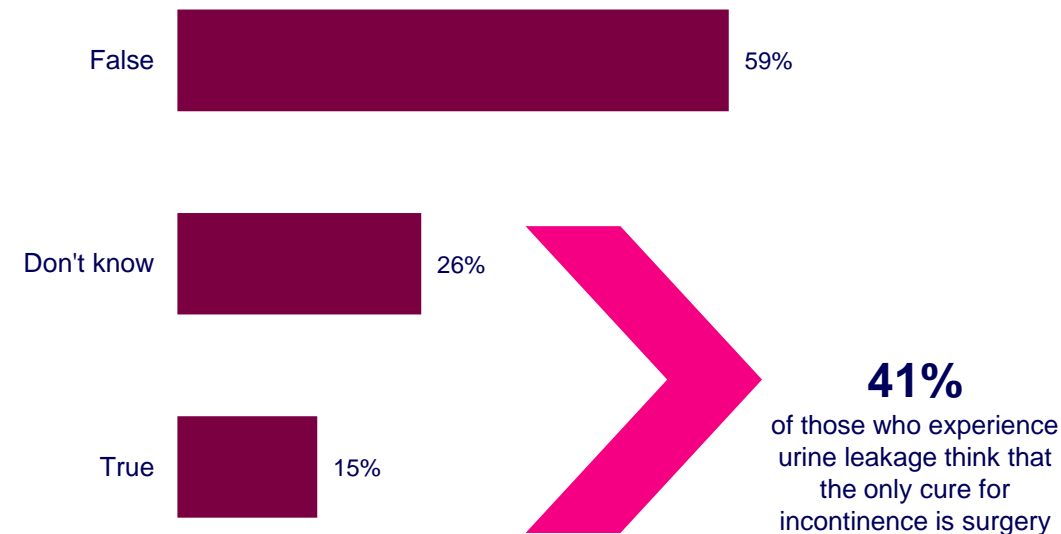
# 2 in 5 with urine leakage do not know that there are cures for incontinence other than surgery

1 in 5 with urine leakage do not know that men experience incontinence.

Only women experience incontinence (False)



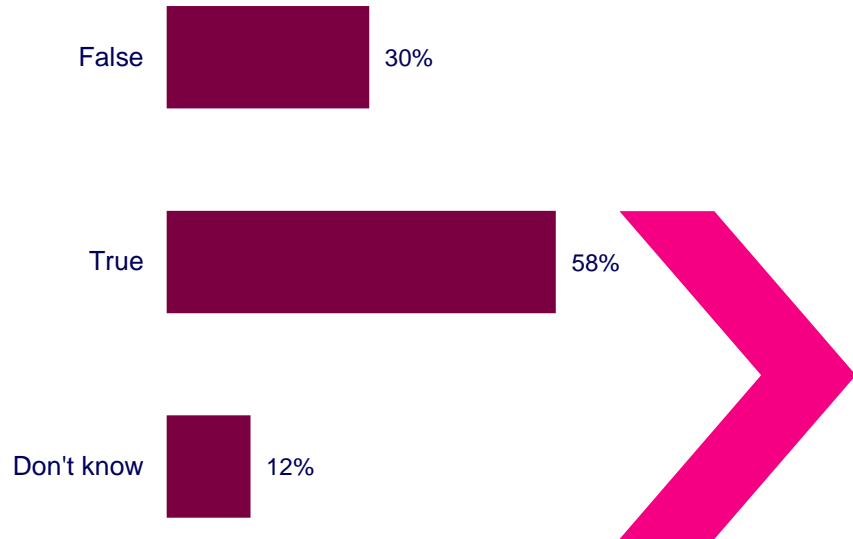
The only cure for incontinence is surgery (False)





# 7 in 10 people in menopause do not know that they can get pregnant after reaching menopause

Women do not get pregnant once they reach menopause  
(False)

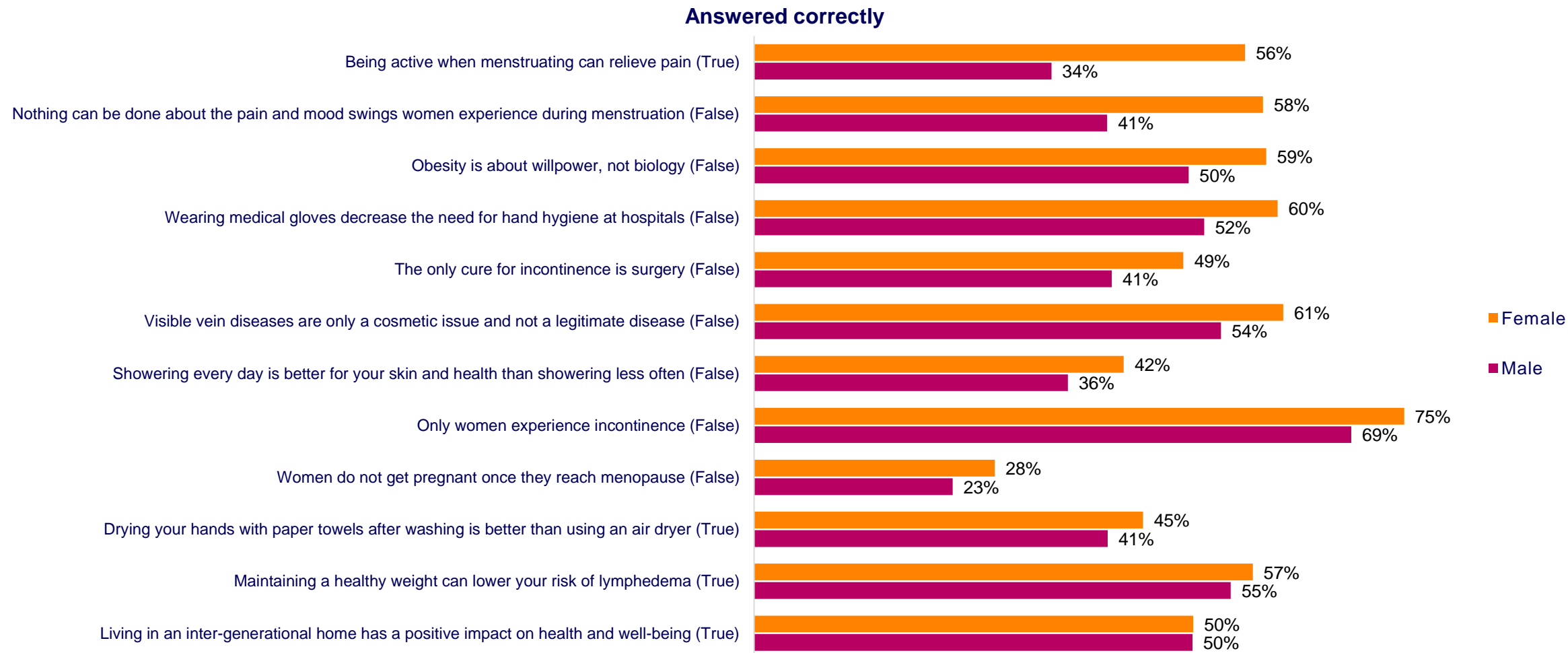


**70%**  
of those  
experiencing  
menopause do not  
know that women  
can get pregnant  
when they reach  
menopause



# Women answered more correctly on most myths compared to men

The largest knowledge gap between genders is about menstruation.



# Most learn about health and hygiene from healthcare providers or online/themselves

Mothers are the preferred source of learning about menstruation and menopause.

	Highest (3)	Lowest (1)								
	Mother	Father	Siblings	Grandparents	Friends	Partner	School	Myself	Healthcare provider	Online
Menstruation	36%	4%	8%	5%	12%	13%	16%	30%	18%	18%
Wounds (e.g. minor wounds and chronic wounds)	23%	13%	7%	7%	9%	7%	11%	27%	31%	21%
Infections (e.g. bacterial and viral)	19%	11%	6%	6%	9%	7%	13%	23%	37%	24%
Diabetes	17%	14%	6%	12%	11%	7%	10%	16%	32%	23%
Skin issues (e.g. eczema and diaper rash)	18%	9%	7%	5%	9%	7%	8%	25%	34%	24%
Menopause	29%	4%	5%	7%	9%	9%	9%	22%	23%	22%
Orthopaedics (e.g. fractures, braces)	13%	9%	6%	6%	9%	5%	9%	22%	36%	21%
Antimicrobial resistance (e.g. germs resistant to antimicrobial drugs)	12%	8%	5%	5%	7%	5%	11%	17%	33%	26%
Vein disorders (e.g. venous insufficiency or thrombosis)	14%	8%	5%	7%	8%	5%	9%	16%	31%	24%
Urine leakage (e.g. incontinence)	14%	7%	4%	8%	8%	4%	7%	23%	27%	24%
Andropause	13%	10%	5%	6%	9%	6%	8%	15%	23%	24%
Endometriosis	11%	6%	6%	5%	11%	6%	8%	16%	27%	26%
Tissue swelling (e.g. lymphedema)	10%	8%	5%	6%	8%	5%	9%	16%	29%	25%

# Females learn about menstruation and menopause mostly from mothers or healthcare providers

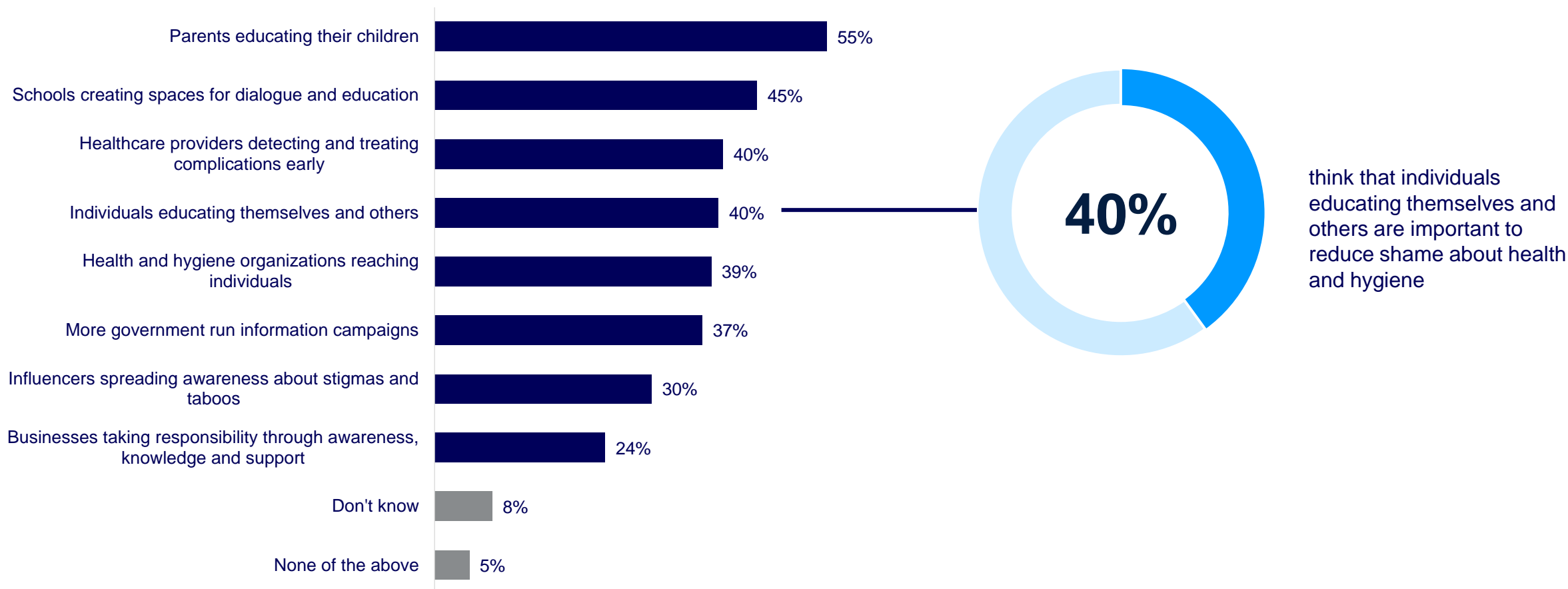
Men learn about feminine healthcare from partners, mothers or online. Learning about urine leakage and diabetes comes from healthcare providers or online for both genders. Females are unlikely to learn about any of these 4 conditions from partners.

Highest (3)      Lowest (1)

		Mother	Myself	Online	Healthcare provider	Partner	School	Friends	Other	Siblings	Grandparents	Father
Menstruation	Male	21%	13%	18%	14%	31%	17%	10%	11%	9%	5%	6%
	Female	45%	41%	18%	20%	2%	15%	14%	6%	8%	4%	2%
Menopause	Male	24%	13%	20%	17%	19%	12%	9%	11%	6%	8%	7%
	Female	32%	28%	24%	27%	2%	7%	9%	9%	4%	6%	2%
Urine leakage (incontinence)	Male	11%	19%	23%	26%	6%	8%	8%	14%	5%	9%	10%
	Female	16%	25%	25%	27%	2%	6%	8%	13%	4%	7%	4%
Diabetes	Male	18%	17%	22%	32%	8%	11%	11%	11%	6%	12%	15%
	Female	17%	15%	24%	33%	6%	10%	10%	11%	6%	12%	12%

# Parents and schools have the biggest role to play in reducing shame and taboo

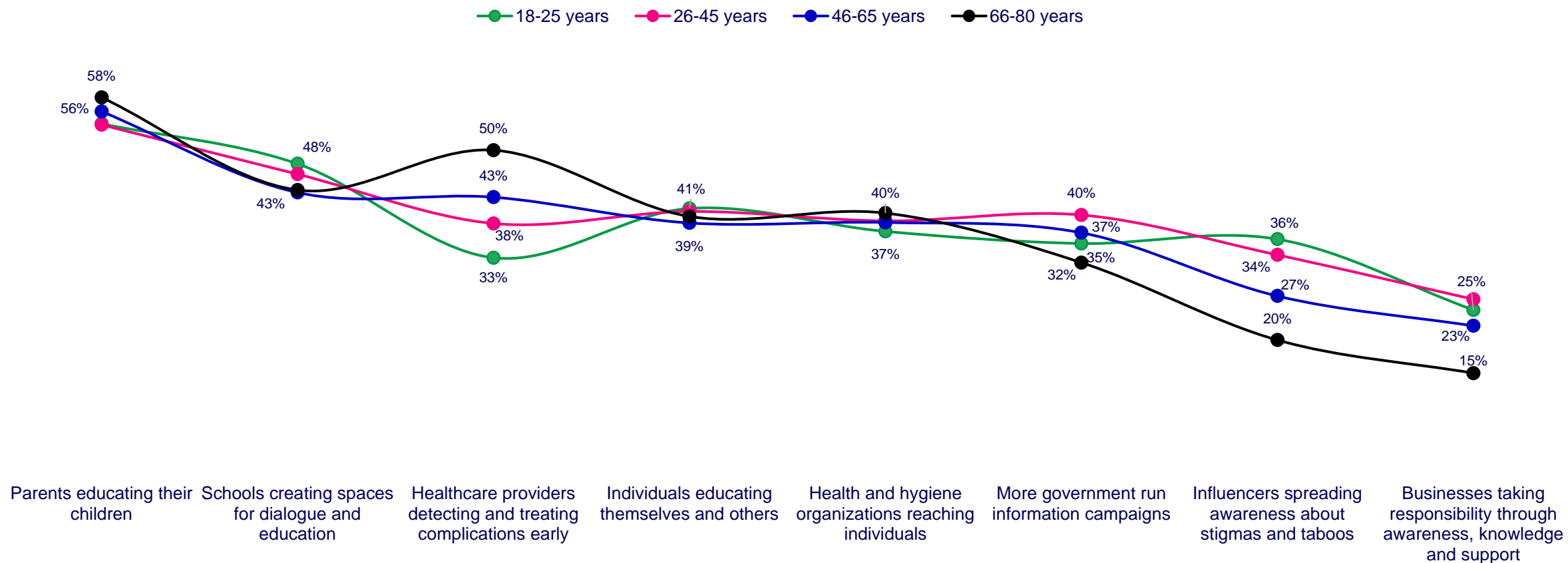
Overall, low responsibility is located with businesses and influencers.





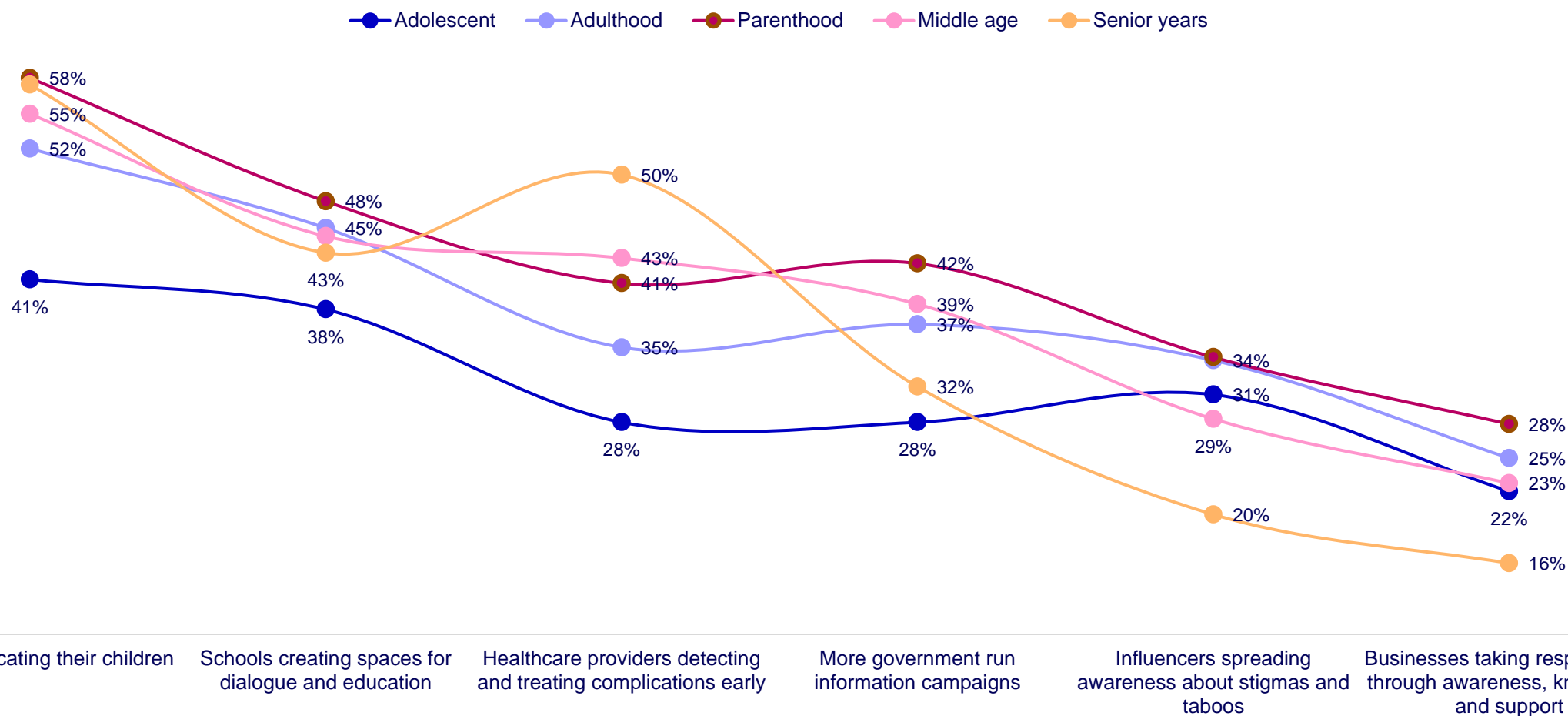
# The necessary role of parents and schools in reducing shame is unanimous across all age groups

Older people believe healthcare providers detecting and treating complications early to be more necessary than compared to younger people who attribute more importance to influencers spreading awareness.



# Parents, especially, are most likely to locate the responsibility with themselves and schools

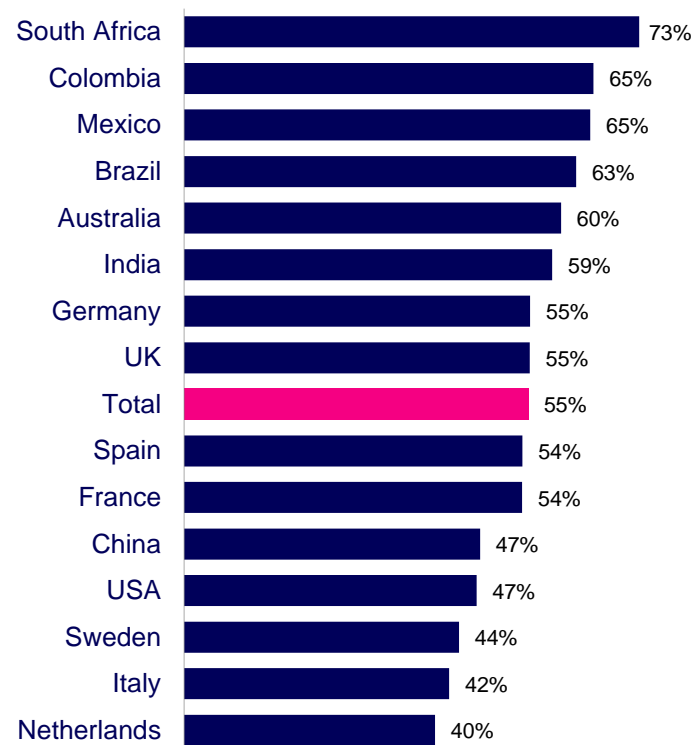
Seniors have the lowest trust in influencers and businesses to take the responsibility.



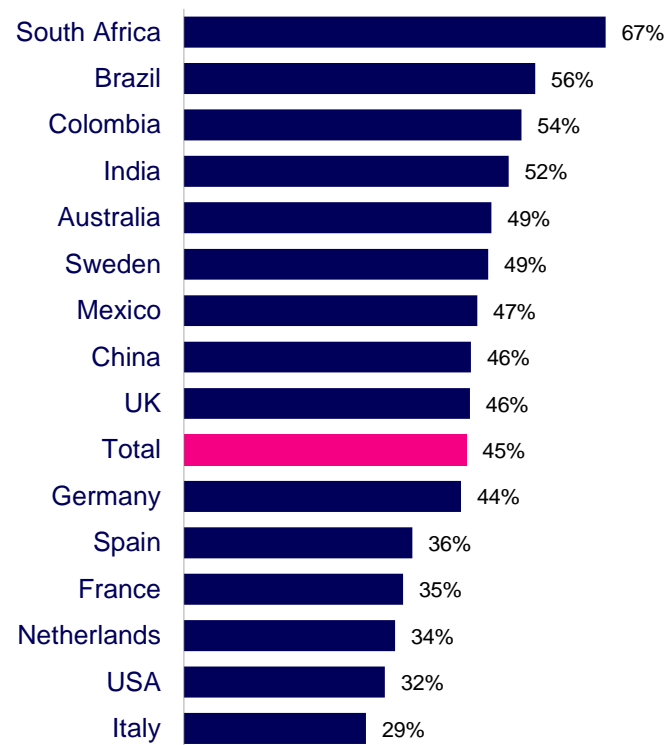
# Education through parents and schools are seen as vital in South Africa, Colombia and Brazil

Businesses taking responsibility is seen as least necessary in France, USA and Netherlands.

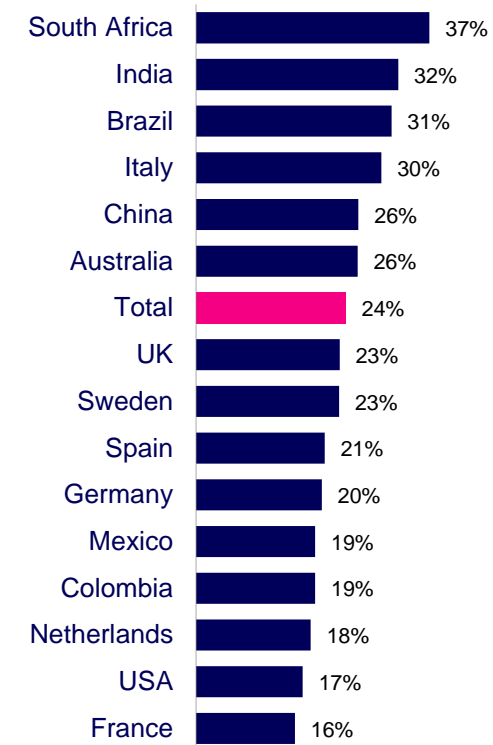
### Parents educating their children



### Schools creating spaces for dialogue and education



### Businesses taking responsibility through awareness, knowledge and support



# But people feel the least comfortable talking to teachers

..and feel the most comfortable discussing with healthcare providers, partners or mothers. The most (15%) do not feel comfortable talking to anyone about menstruation and urine leakage.

Highest (3)

Lowest

	Mother	Father	Siblings	Grandparents	Friends	Partner	Teachers	Healthcare provider	Online communities	No one
Wounds (e.g. minor wounds and chronic wounds)	23%	14%	15%	7%	21%	26%	6%	45%	11%	10%
Diabetes	23%	15%	15%	9%	19%	24%	6%	46%	12%	9%
Orthopaedics (e.g. fractures, braces)	20%	13%	14%	7%	19%	23%	6%	48%	11%	10%
Infections (e.g. bacterial and viral)	21%	12%	13%	7%	18%	25%	6%	49%	12%	9%
Skin issues (e.g. eczema and diaper rash)	22%	11%	14%	7%	19%	25%	5%	47%	12%	10%
Antimicrobial resistance (e.g. germs resistant to antimicrobial drugs)	17%	10%	11%	6%	15%	20%	6%	45%	11%	11%
Menstruation	25%	5%	12%	5%	19%	25%	5%	31%	10%	15%
Vein disorders (e.g. venous insufficiency or thrombosis)	17%	10%	11%	6%	14%	19%	5%	45%	10%	11%
Menopause	23%	5%	10%	5%	16%	22%	4%	34%	10%	14%
Tissue swelling (e.g. lymphedema)	15%	9%	10%	5%	13%	18%	5%	42%	10%	13%
Urine leakage (e.g. incontinence)	16%	7%	9%	5%	12%	19%	4%	41%	10%	15%
Endometriosis	14%	6%	8%	4%	13%	16%	5%	37%	10%	14%
Andropause	12%	7%	6%	4%	10%	16%	4%	29%	9%	14%

# Irrespective of gender, people feel least comfortable talking to teachers

Healthcare providers, partners and mothers are the most comfortable to discuss with.

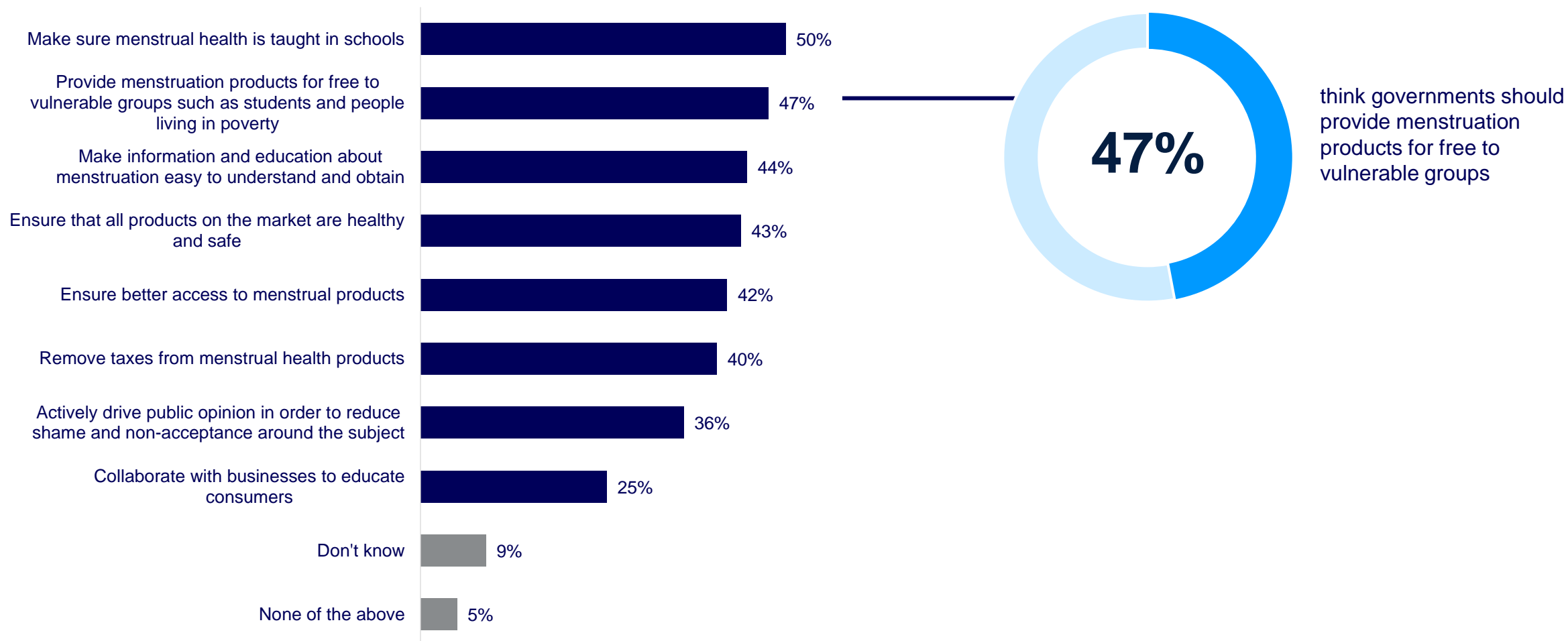


		Healthcare provider	Partner	Mother	Friends	Siblings	Online communities	Father	Teachers	Grandparents
Menstruation	Male	22%	30%	13%	10%	7%	8%	6%	5%	4%
	Female	39%	21%	36%	28%	17%	11%	4%	4%	5%
Menopause	Male	25%	26%	15%	10%	7%	9%	6%	5%	5%
	Female	43%	18%	31%	22%	13%	11%	5%	4%	5%
Urine leakage (incontinence)	Male	39%	23%	12%	10%	8%	9%	10%	4%	5%
	Female	43%	15%	20%	14%	9%	10%	5%	4%	5%
Wounds (e.g. minor wounds and chronic wounds)	Male	42%	30%	21%	20%	14%	11%	16%	7%	7%
	Female	48%	23%	25%	22%	17%	12%	13%	6%	8%
Skin issues (e.g. eczema and diaper rash)	Male	43%	28%	18%	16%	12%	11%	13%	6%	7%
	Female	50%	22%	26%	22%	16%	12%	10%	5%	7%

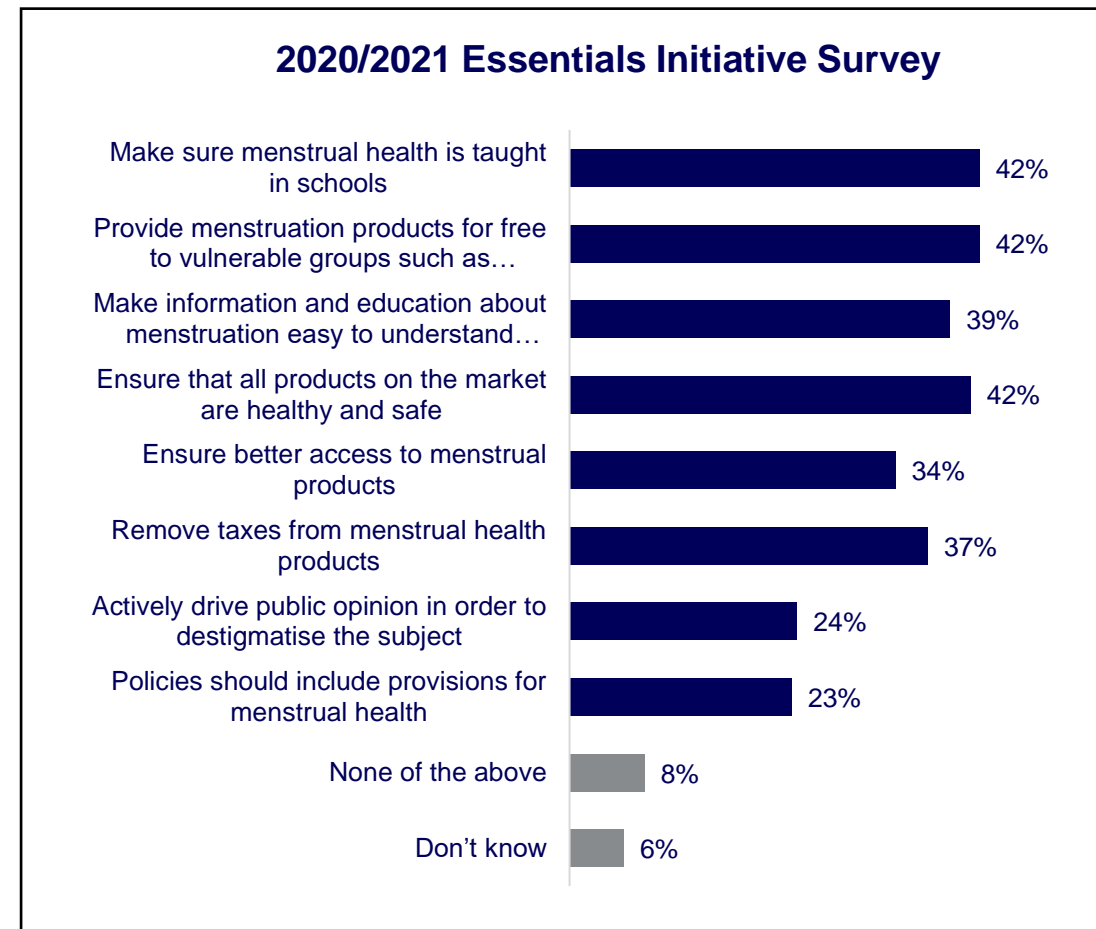
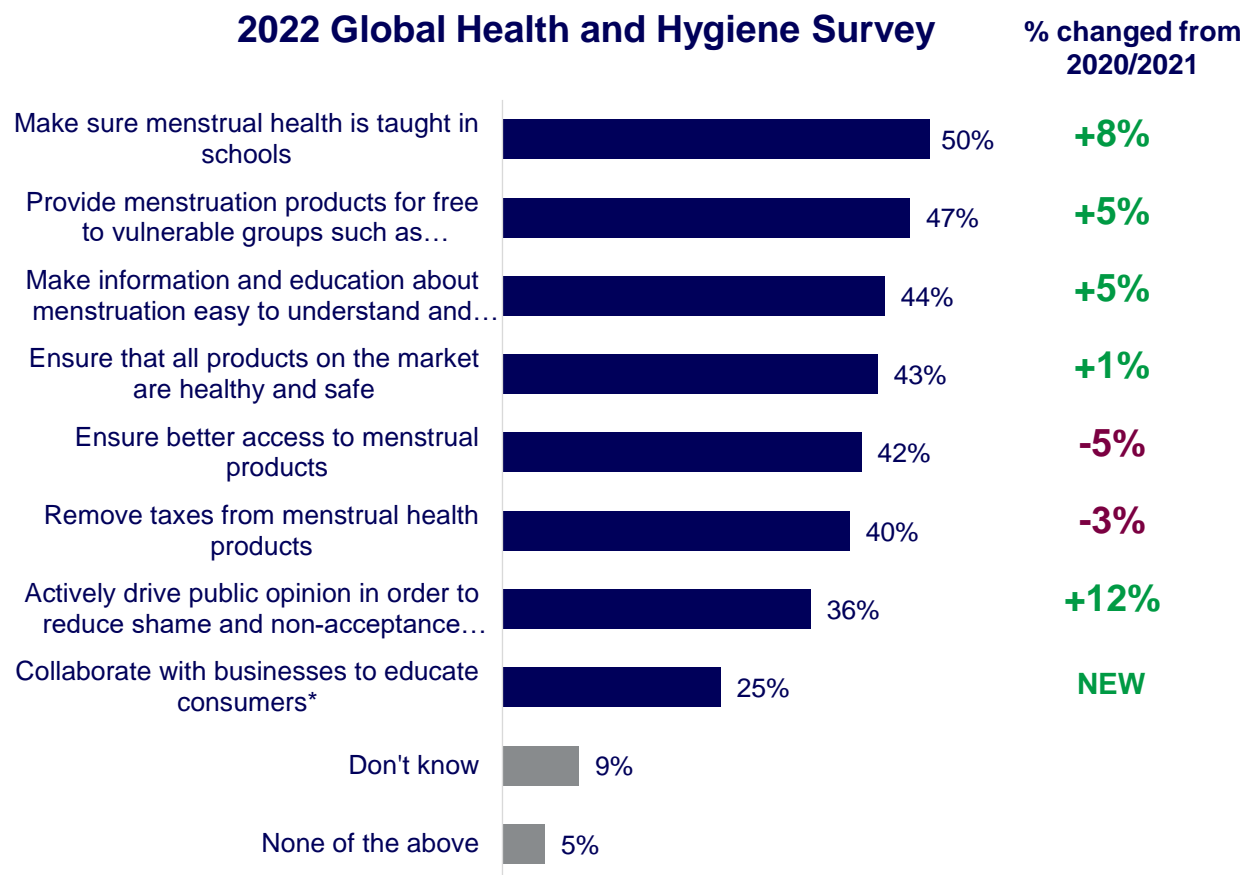


# Government and public authorities should lead through schools and accessibility of information/products

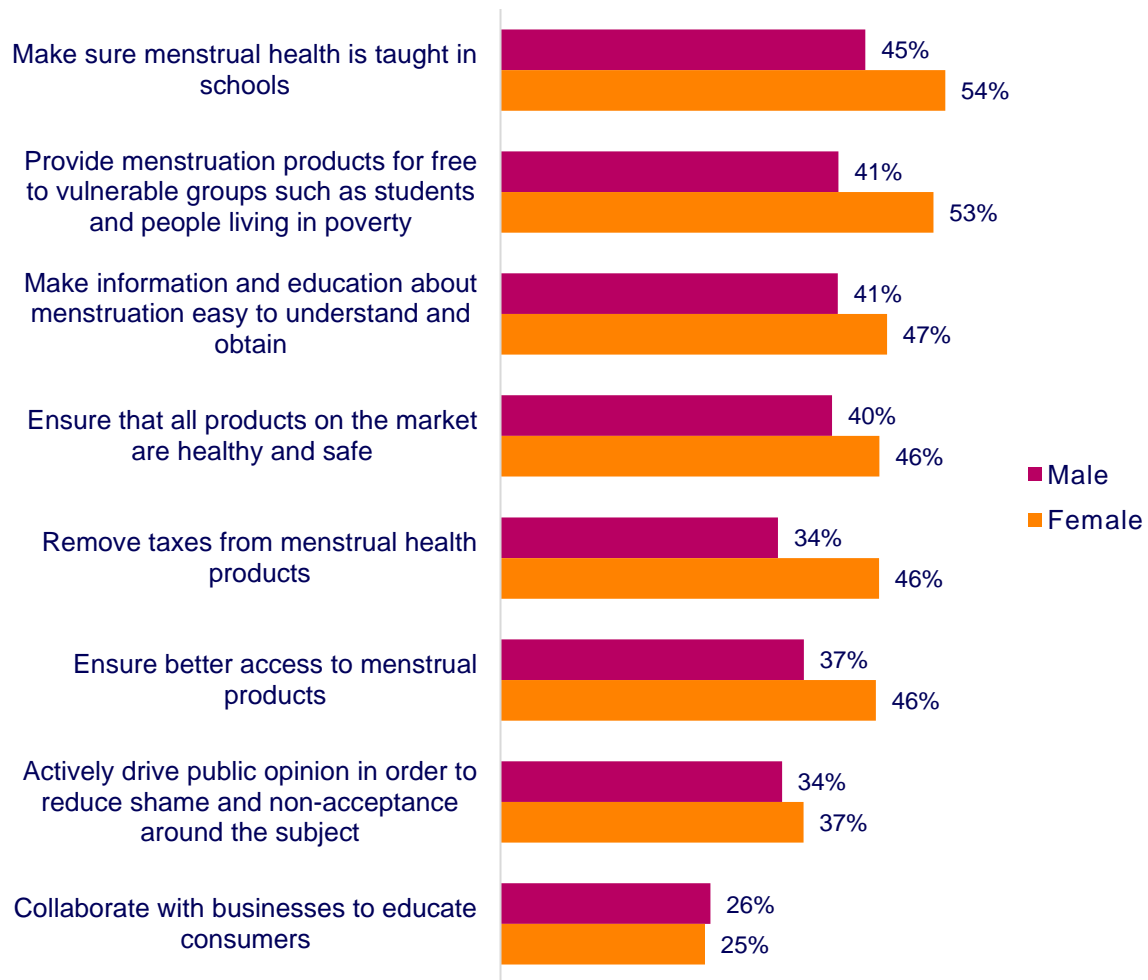
Driving public opinion and educating consumers is low on the agenda.



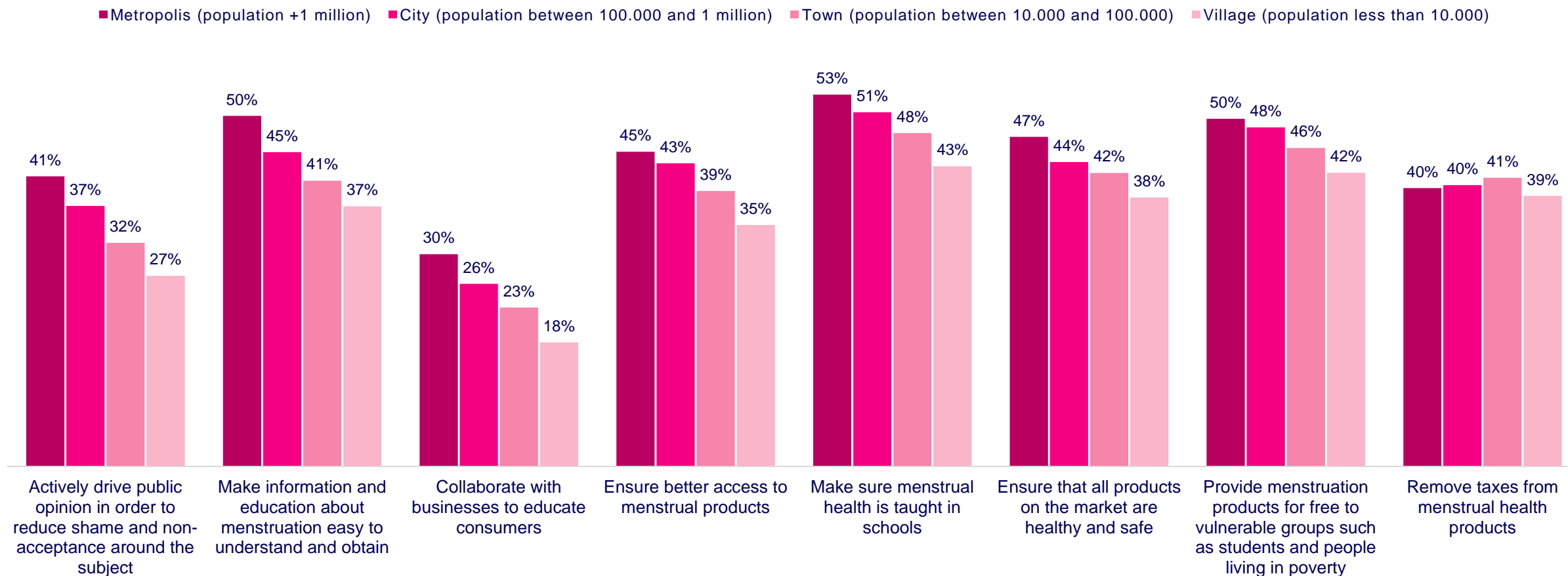
# Compared to 2020/2021, more advocate for actively driving public opinion in order to reduce stigma and for teaching menstrual health in schools



# Women in general say more must be done through education and access



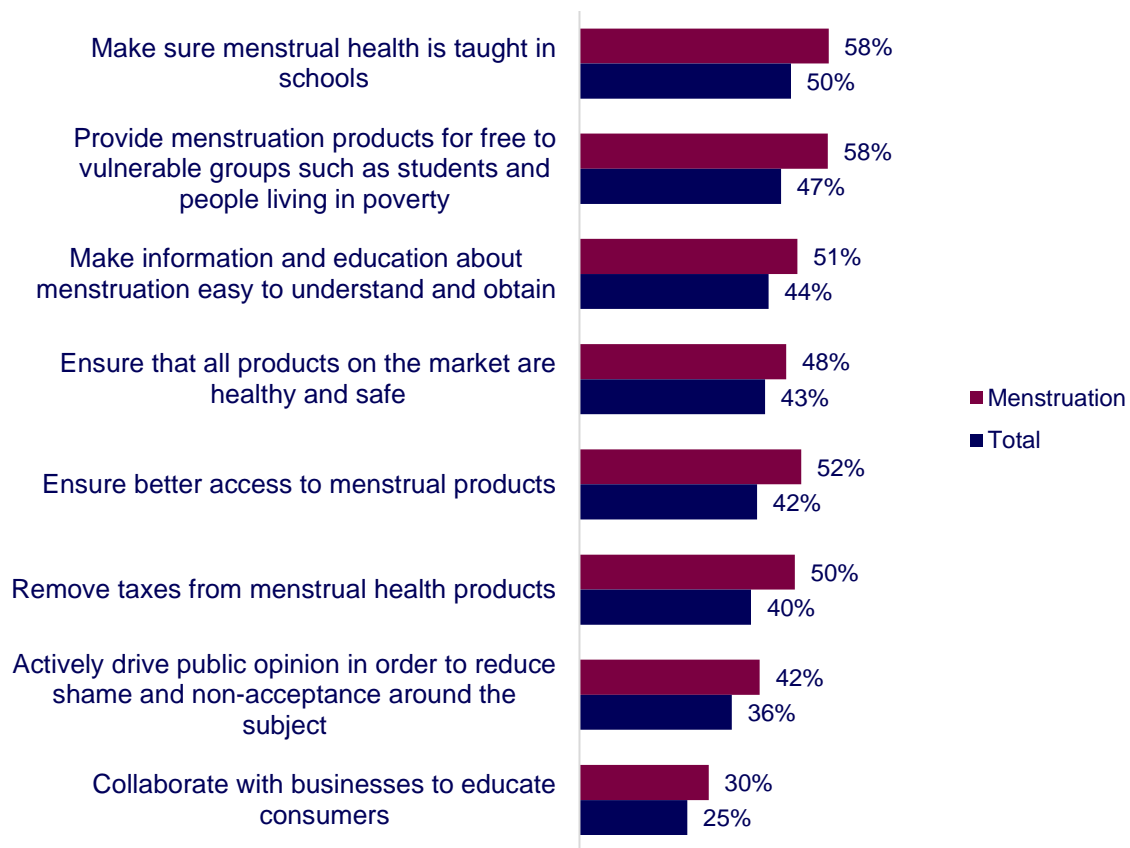
# Rural areas differ most from urban areas on measures that focus on the government's role in education and information





# People experiencing menstruation vouch most for teaching menstrual health at school and providing products for free to vulnerable groups

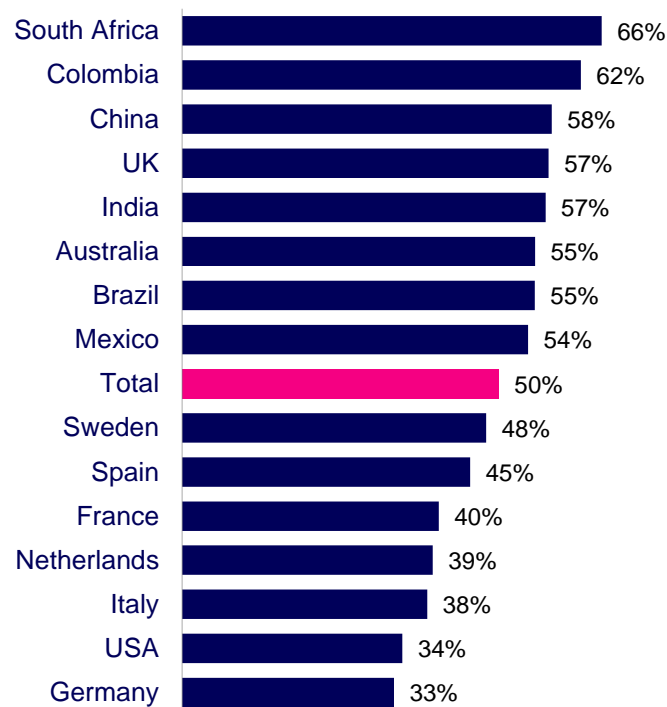
Experience menstruation and total



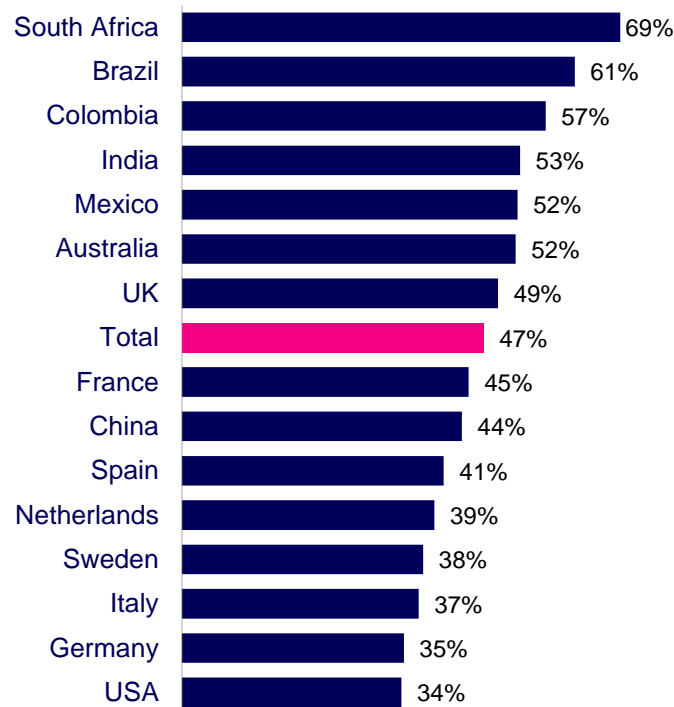


# South Africa, Colombia and India want governments to do more for menstrual health in general

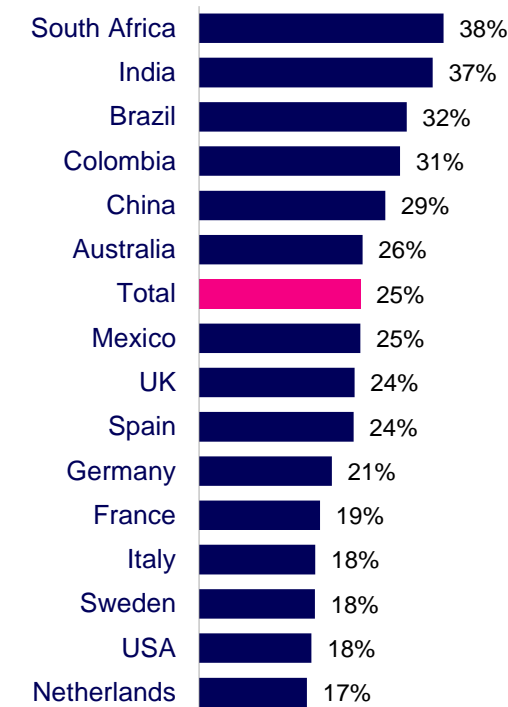
**Make sure menstrual health is taught in schools**



**Provide menstruation products for free to vulnerable groups such as students and people living in poverty**



**Collaborate with businesses to educate consumers**



# FUTURE HYGIENE DIALOGUE

## Key Highlights



**23%**

going through incontinence say they avoid talking about it, followed by those going through obesity (18%) and mental health issues (17%)



**55%**

say they are knowledgeable about menstruation. People say they are knowledgeable about or actively try to learn about issues they are likely to experience in their respective age or gender.



**15%**

of females have learned about menstruation from school, however 58% of women who menstruate think schools should engage more in menstrual health.



**45%**

say schools creating spaces for dialogue and education are necessary to reduce shame and stigma. But people feel least comfortable talking to teachers about health and hygiene.

## Contextual Summary

**Children are the future. We need to do more to create spaces for discussion and dialogue with them in order to reduce stigma and taboo.**

Habits related to health and hygiene are set early in life, and often learnt from those around us. To share personal information is often scary, but also an effective way to break down walls and bring people together. Our hygiene and health needs change throughout the life cycle. But stigmas and taboos negatively effect the fulfilment of these needs – often for those most in need.

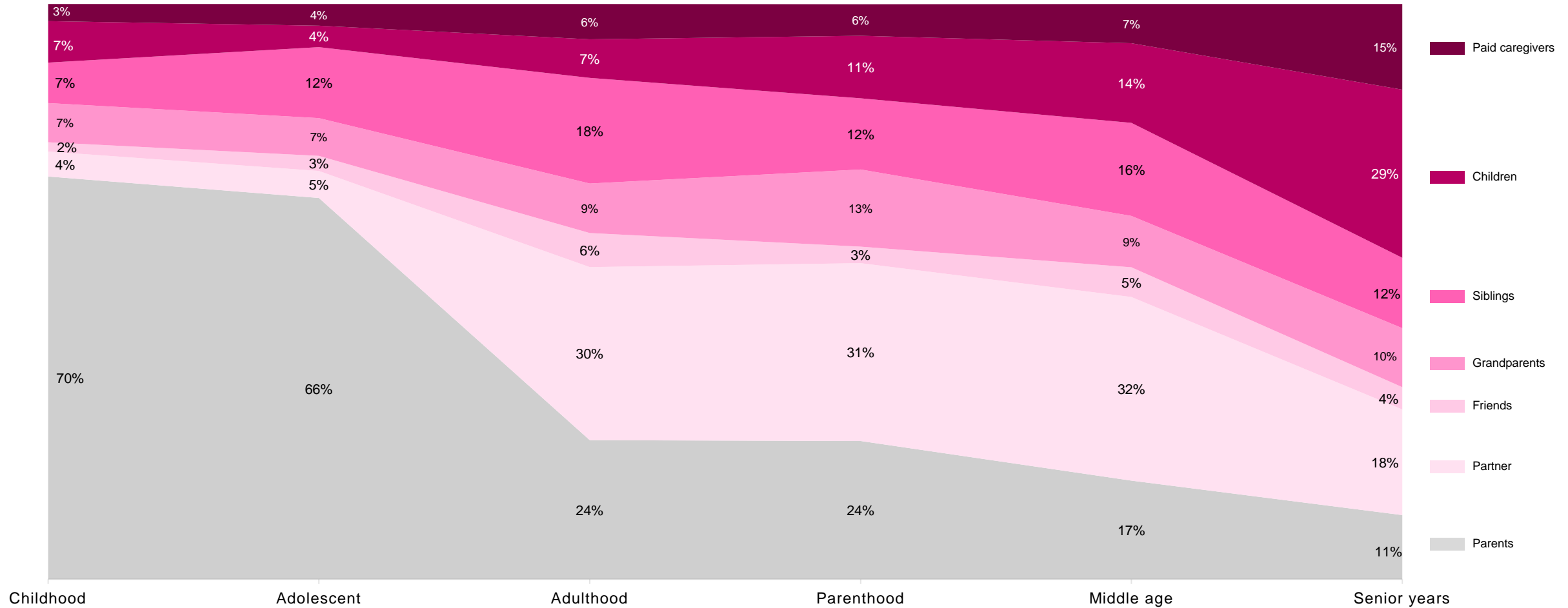
We know that mental health, especially among the young, is increasingly a source of concern. It is only made worse by taboos and stigmas around health and hygiene issues that stifle conversations. Most say they learn about health and hygiene topics from their healthcare providers or online. People, especially parents, would like parents and schools to be more involved, however, most say they do not feel comfortable talking to teachers about these topics.

# Future of Caregiving

# 61%

agree that digital healthcare and services save time for caregiver to spend with patients

# The need for more caregiving shifts from parents in childhood/adolescence to partners & children in old age



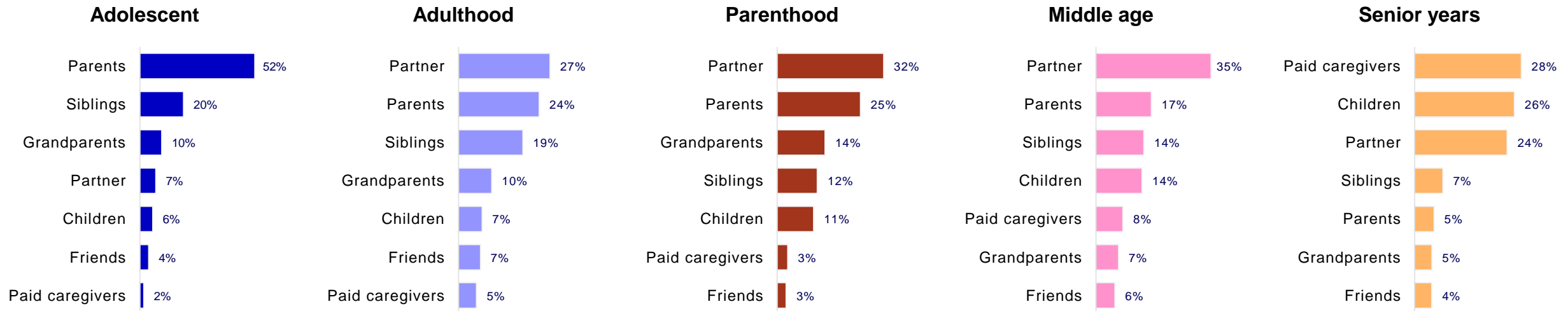


# Seniors want a mix of caregiving from paid caregivers, children and partners

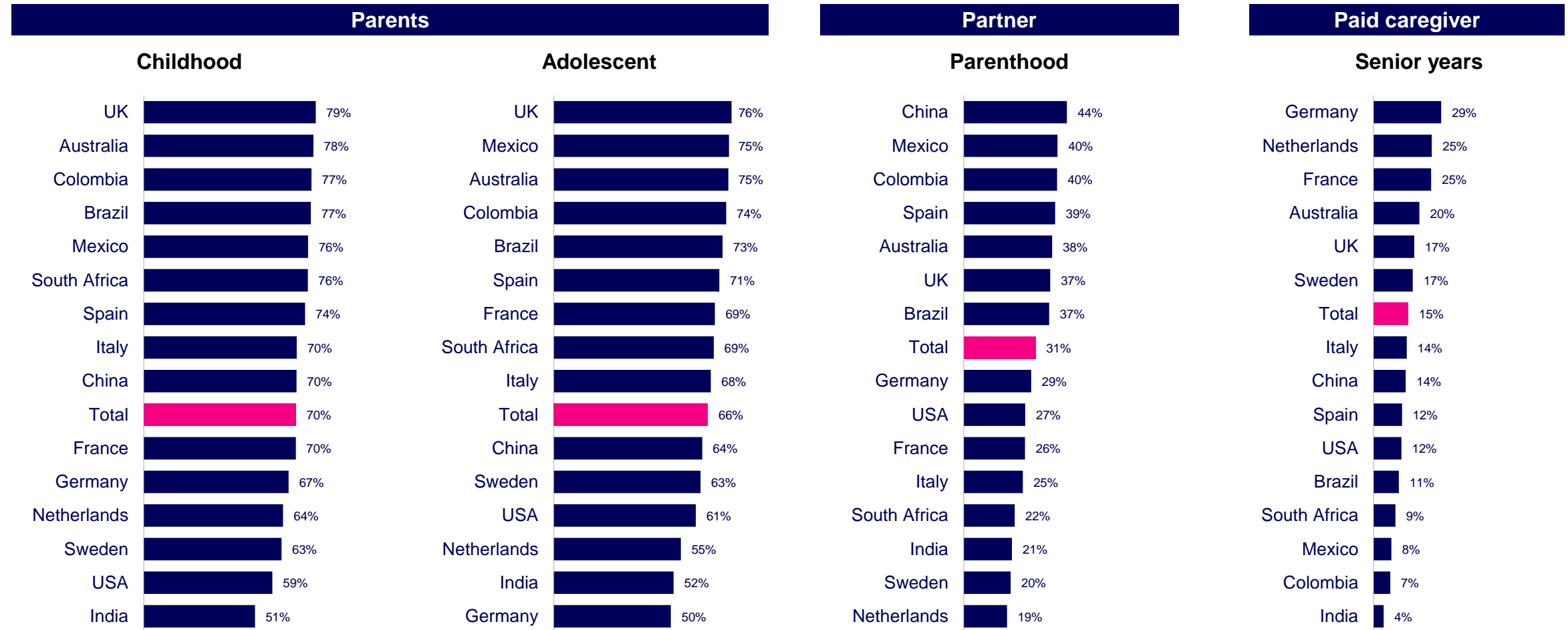
1 in 4 adults want their partners and parents to be more involved as a caregiver.



## View of who should be more involved as a caregiver at their current life stage

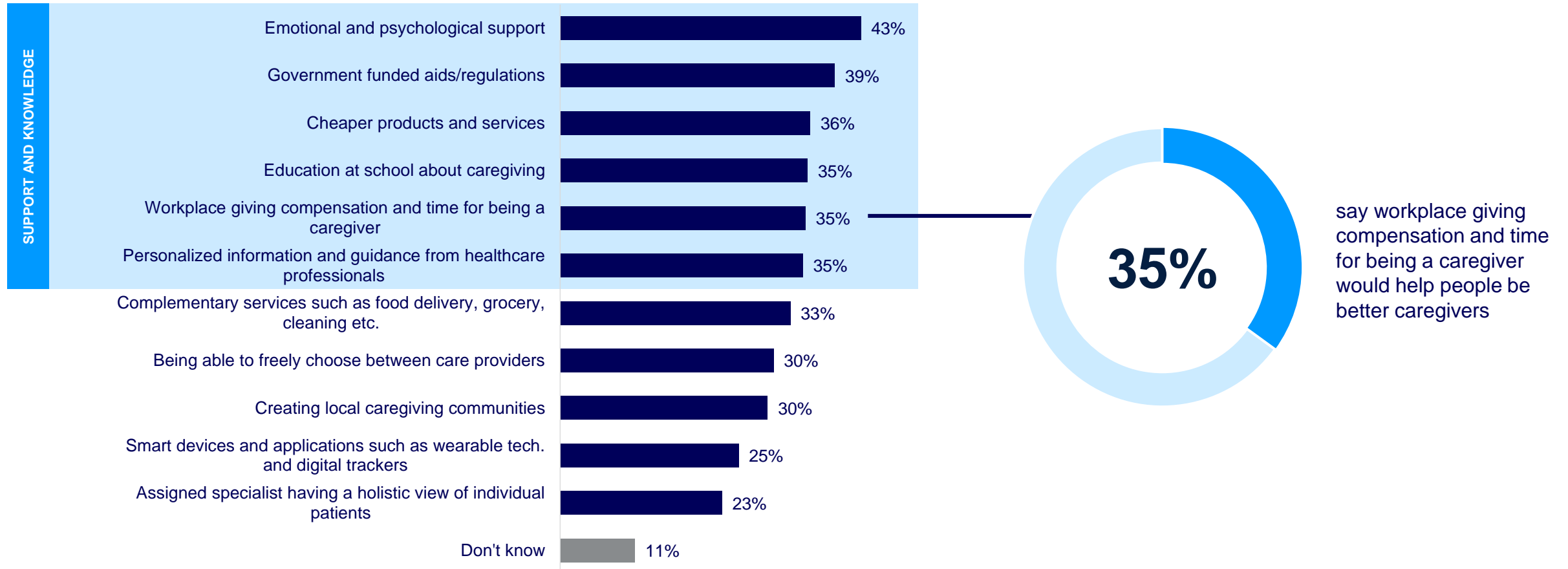


# Paid caregiver during senior years are high on the agenda in Germany, Netherlands and France



# Emotional and financial support along with education would help the most in making caregiving easier

Smart devices and applications are lower in priority than other forms of support.



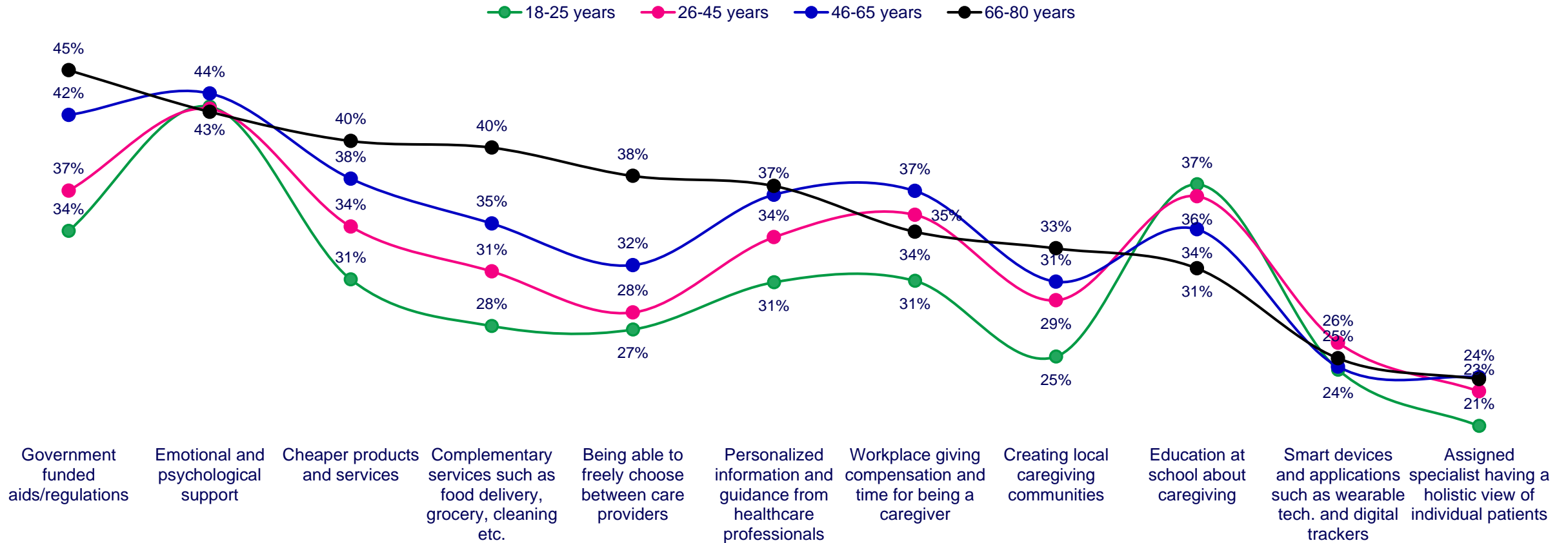
# Women are more likely to vouch for the importance of emotional and psychological support for caregivers





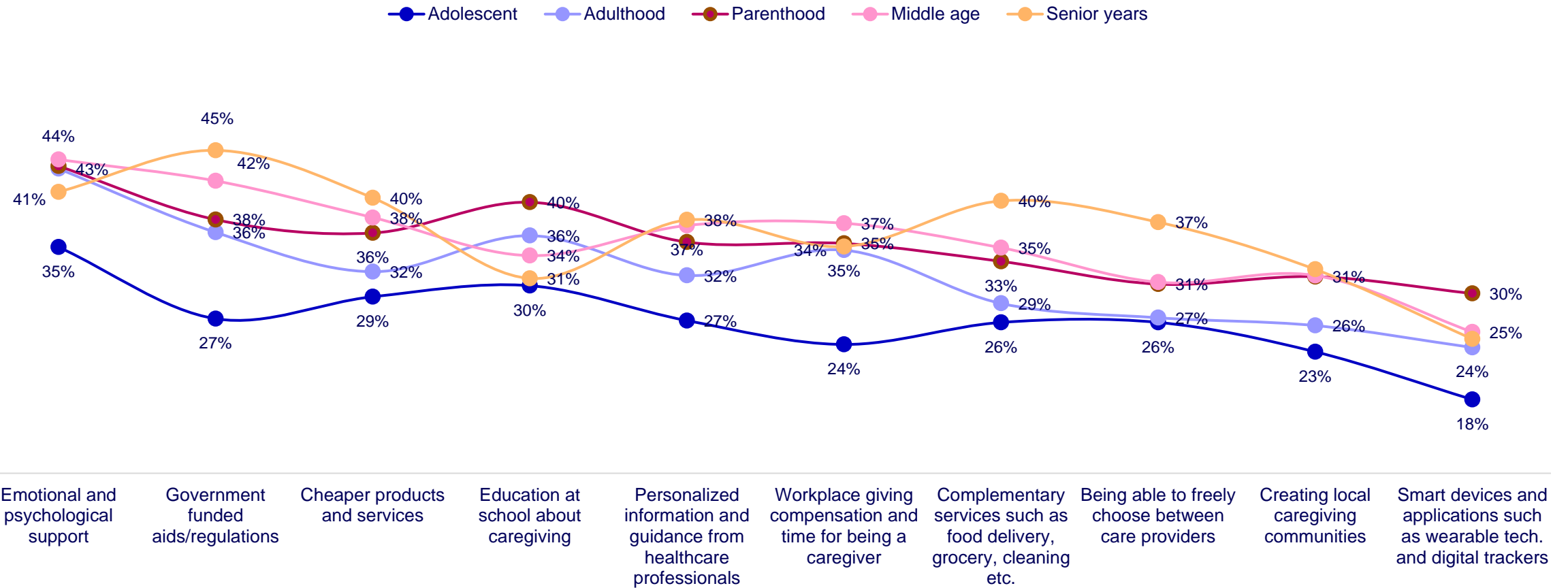
# Older are overall more invested in making it easier for people being a caregiver

The younger place more importance on support and education, while people in working age want workplace compensation in addition to emotional and psychological support.





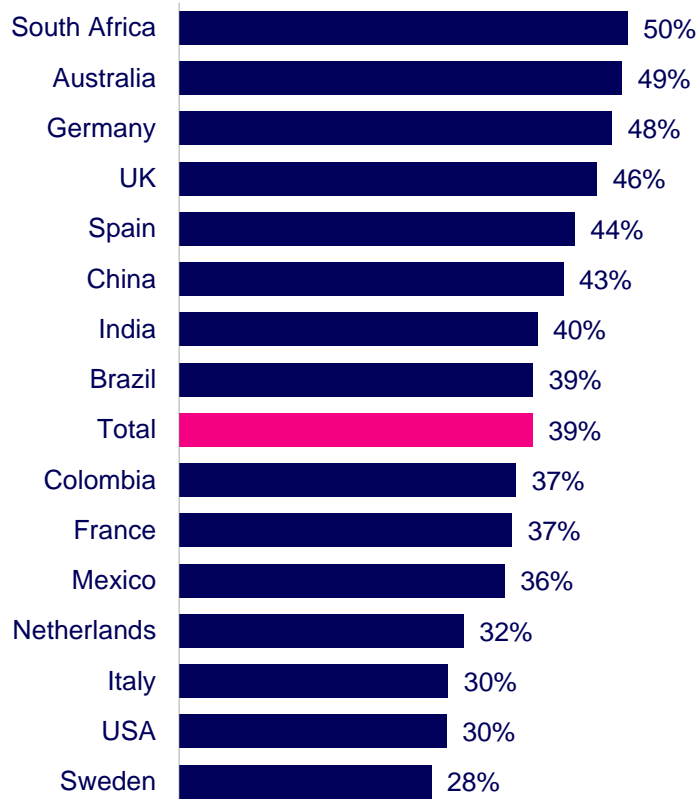
# People in senior years say complementary services and freedom to choose care providers are important



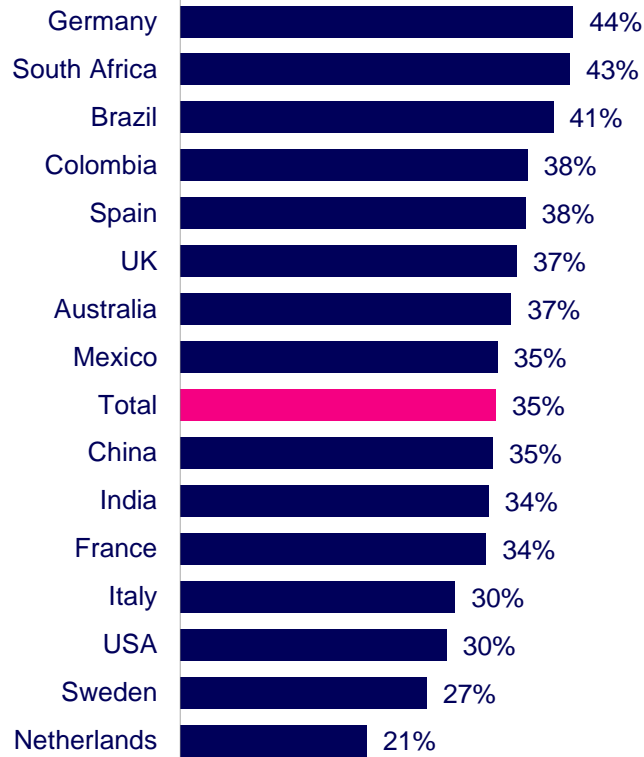
# Workplace giving compensation and time for being a caregiver is higher in Germany and South Africa

Access to smart devices and applications that makes it easier to be a caregiver are wanted by 1 in 3 in China, India and South Africa.

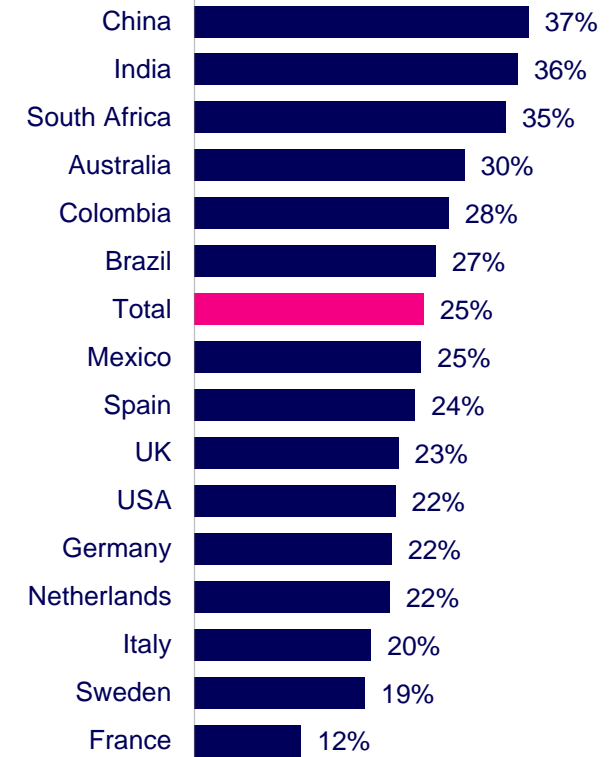
**Government funded aids/regulations**



**Workplace giving compensation and time for being a caregiver**



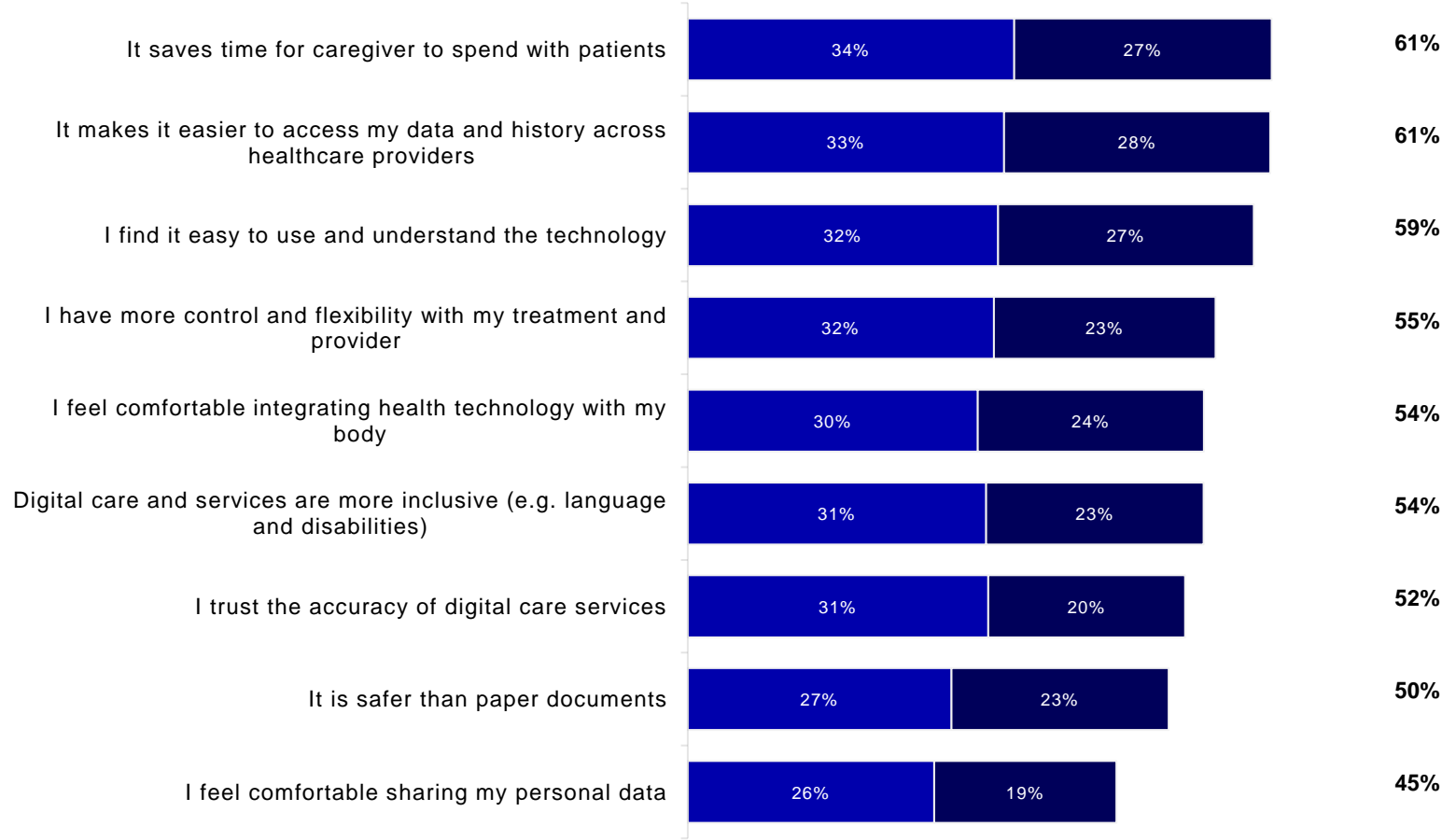
**Smart devices and applications such as wearable tech. and digital trackers**



# The overall outlook towards digital healthcare is positive, with time and control perceived as the top benefits

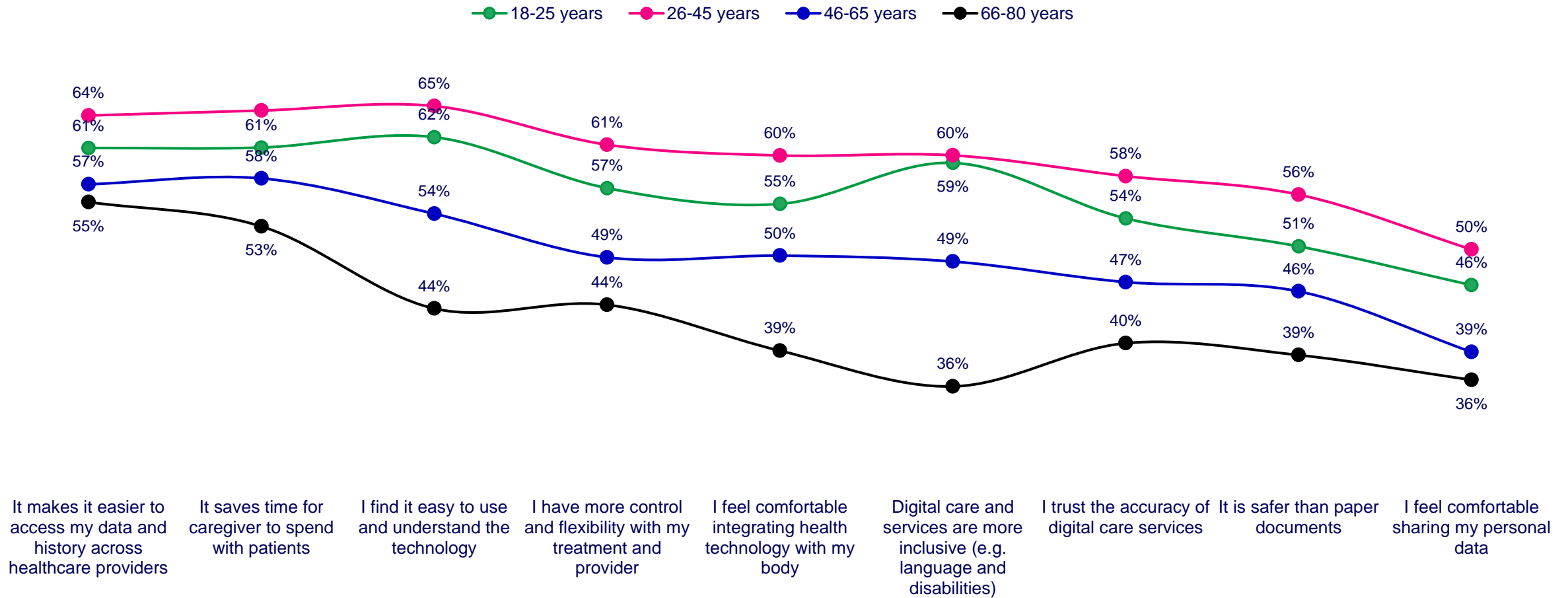
Data privacy is a concern that needs to be addressed. In the 2018 Hygiene Matters Survey, 1 in 5 said they are not interested in tracking and sharing data in return for Hy-Tech services.

■ 4 ■ 5 (agree completely)



# More trust for digital care amongst people aged 18-45 years than those of older age

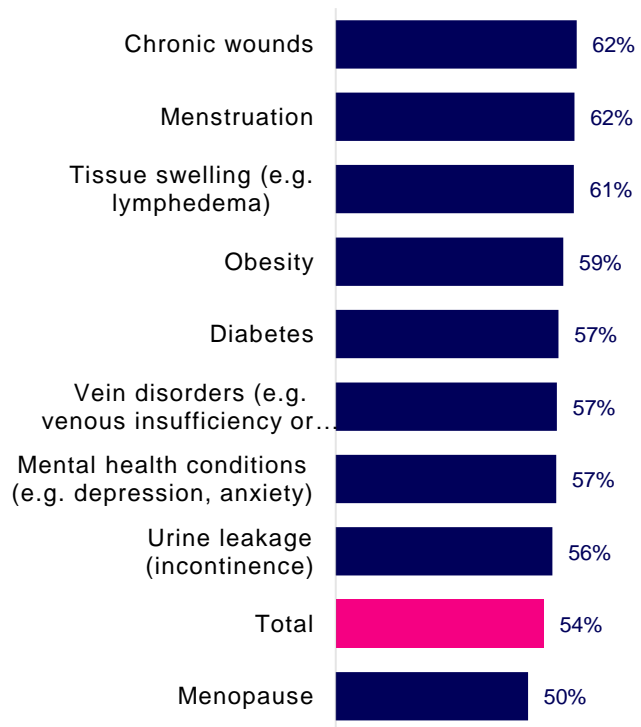
Common perceptions across all age groups - digital care makes it easier to access data and history across providers and saves time for caregivers to spend with patients.



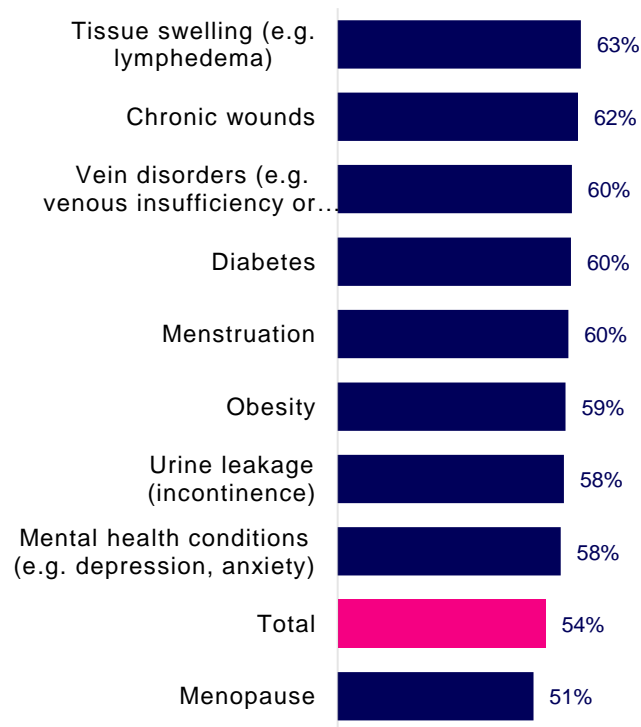
# People experiencing menstruation and chronic wounds agree most that digital care is more inclusive

People going through menopause are the least positive towards digital care when it comes to inclusiveness, comfortability sharing data and the accuracy of the services.

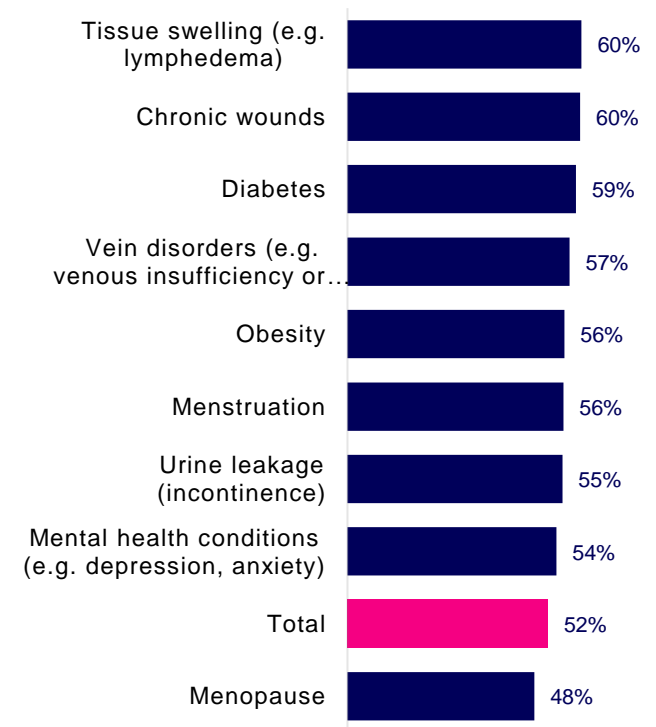
**Digital care and services are more inclusive (e.g. language and disabilities)**



**I feel comfortable integrating health technology with my body**



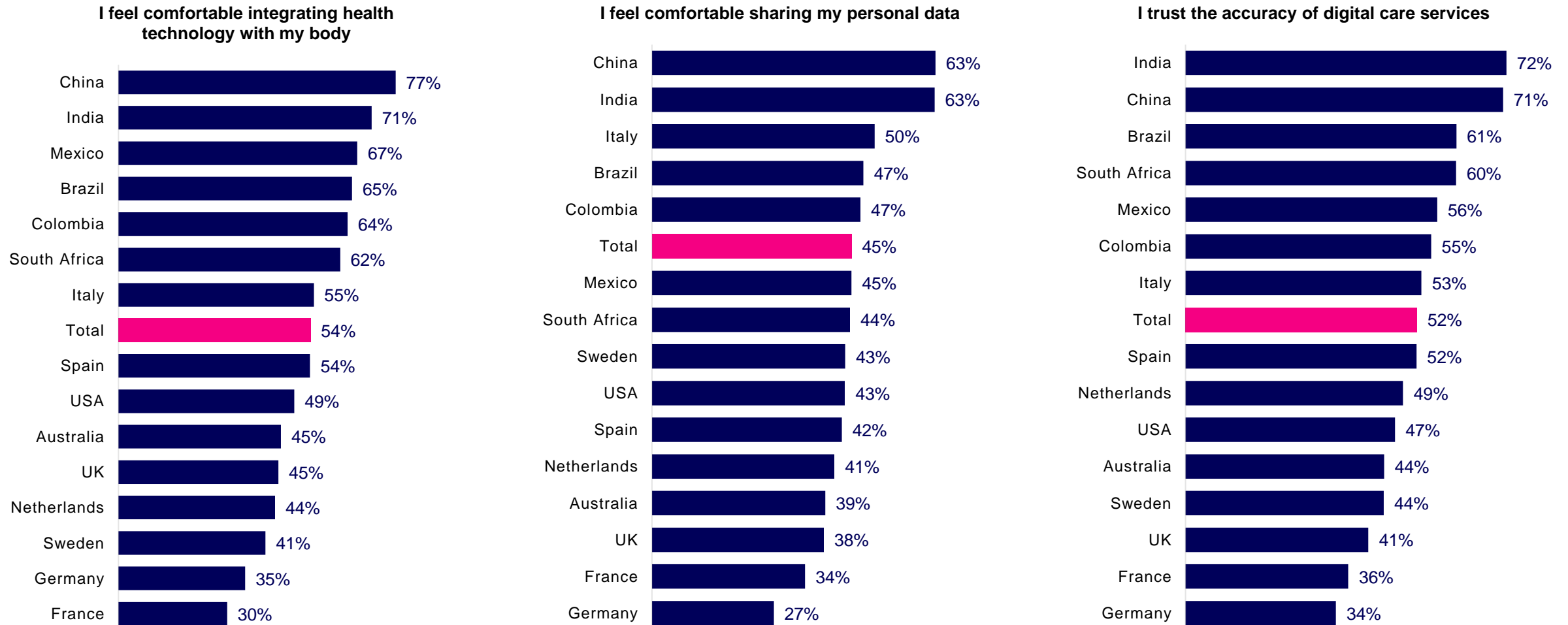
**I trust the accuracy of digital care services**





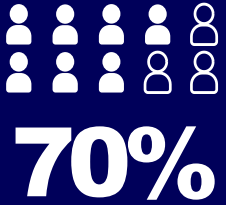
# Sweden, Germany and France are less positive towards incorporating health technology with their body

France and Germany are also less positive towards sharing their personal data and digital healthcare's accuracy.



# FUTURE OF CAREGIVING

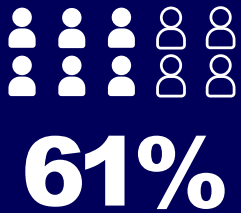
## Key Highlights



say parents should be *more involved* in providing care during childhood and adolescence (66%), and partners during adulthood (30%) and parenthood (31%). During senior years the focus shifts back to children, however seniors themselves (28%) want paid caregivers to be more involved.



say emotional and psychological support would make it easier to be a caregiver in the future, while 1 in 3 say workplace giving compensation and time for being a caregiver would help people be better caregivers.



agree that digitization saves time for caregivers to spend with patients, and makes it easy to access data across care providers (61%). However, only 45% feel comfortable sharing personal data for digital healthcare and services, and even a lesser share of seniors (36%).

## Contextual Summary

**Caregiving is increasingly becoming more required and can be difficult on caregivers. A holistic support system can help improve the care we give.**

The pandemic has raised fresh concerns about the sensitive state of professional care and a shift in society towards self-care. As people live longer than ever before, aging consumers demand better care at home. It is important to understand these new needs and wants to provide holistic solutions for their well-being. What is needed for the future of professional care and how can we empower people to take care of their own and others' health?

The preference and choice of care-giver changes with life stages - with seniors counting most on greater involvement from children and paid-caregivers. Caregiving can be stressful as people juggle between their own lives, work and giving care. Emotional support, government-aid, workplace compensation and digital solutions can make care easier for the giver and better for the receiver.

# Health Threats of Tomorrow

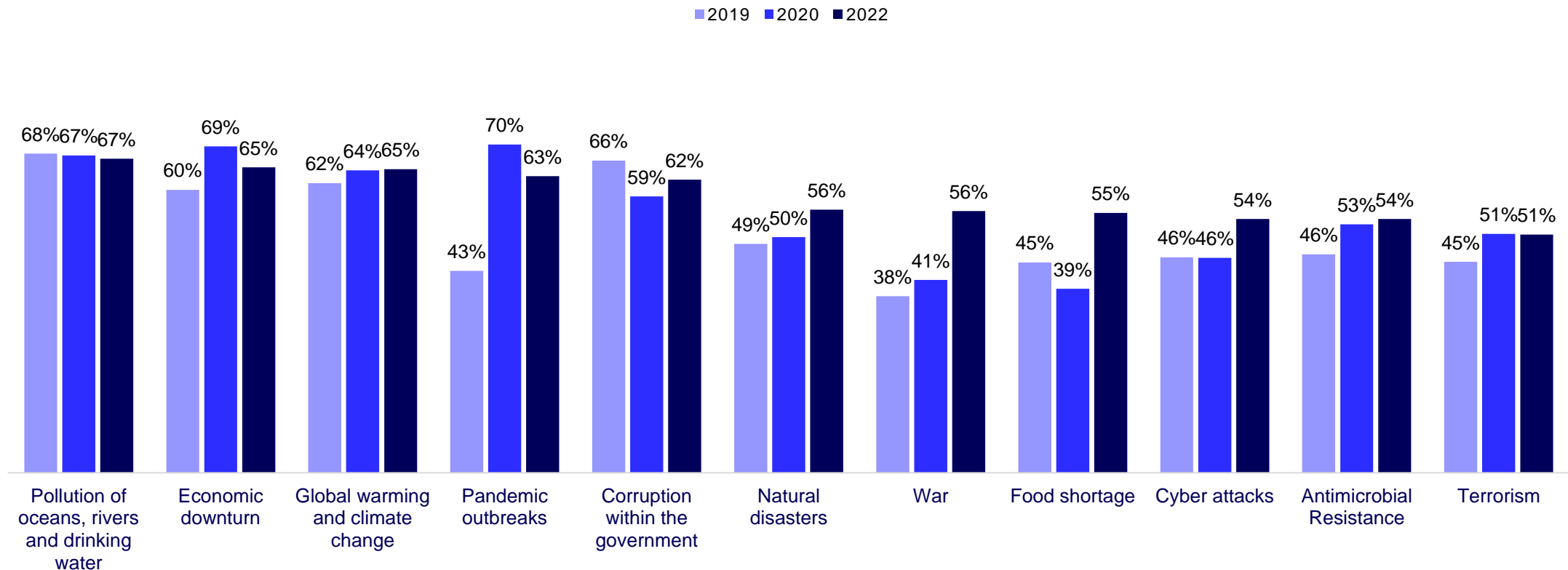
5

# 65%

say antimicrobial resistance is a threat to public health

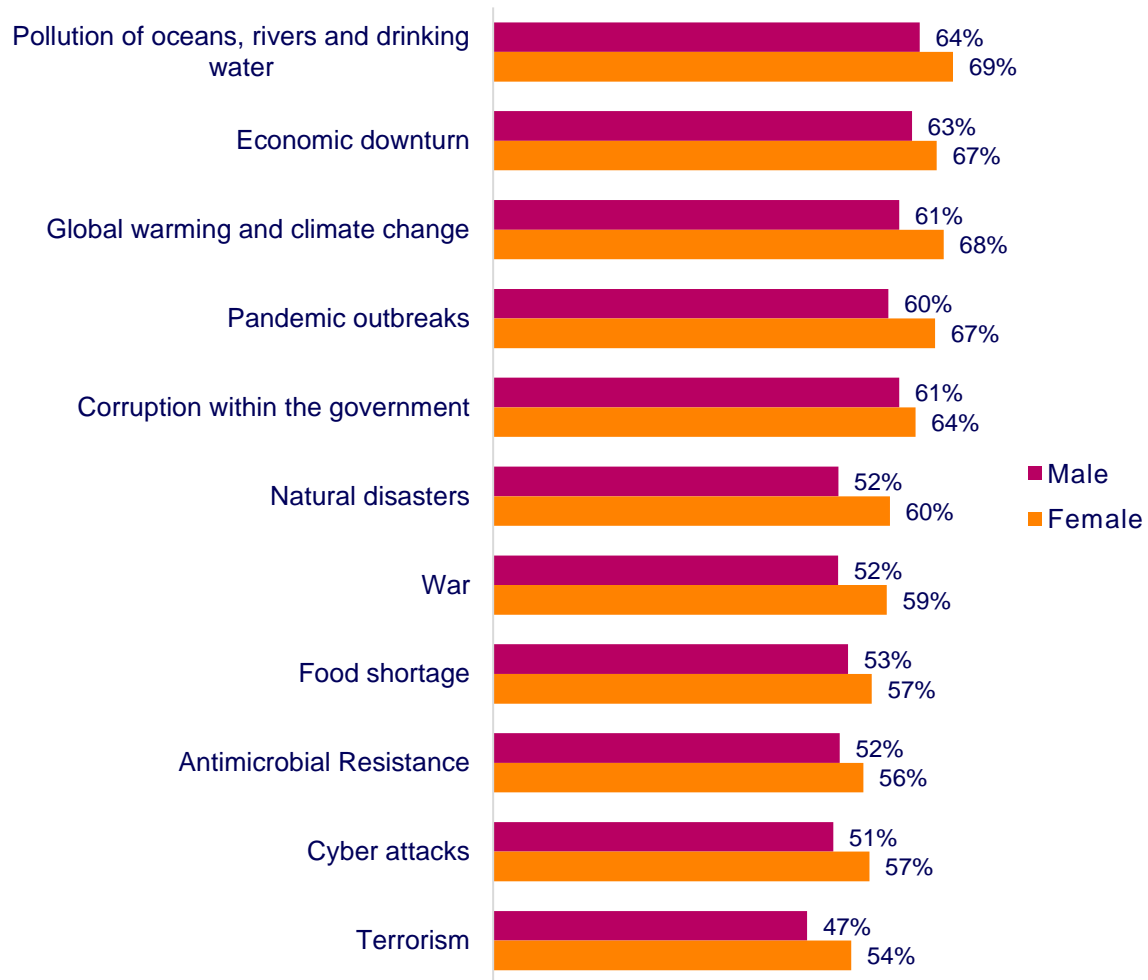
# Continuous increase in perceived threat from antimicrobial resistance – largest increase this years for war, food shortage and cyber attacks

Terrorism has least perceived threat to public health, in comparison.



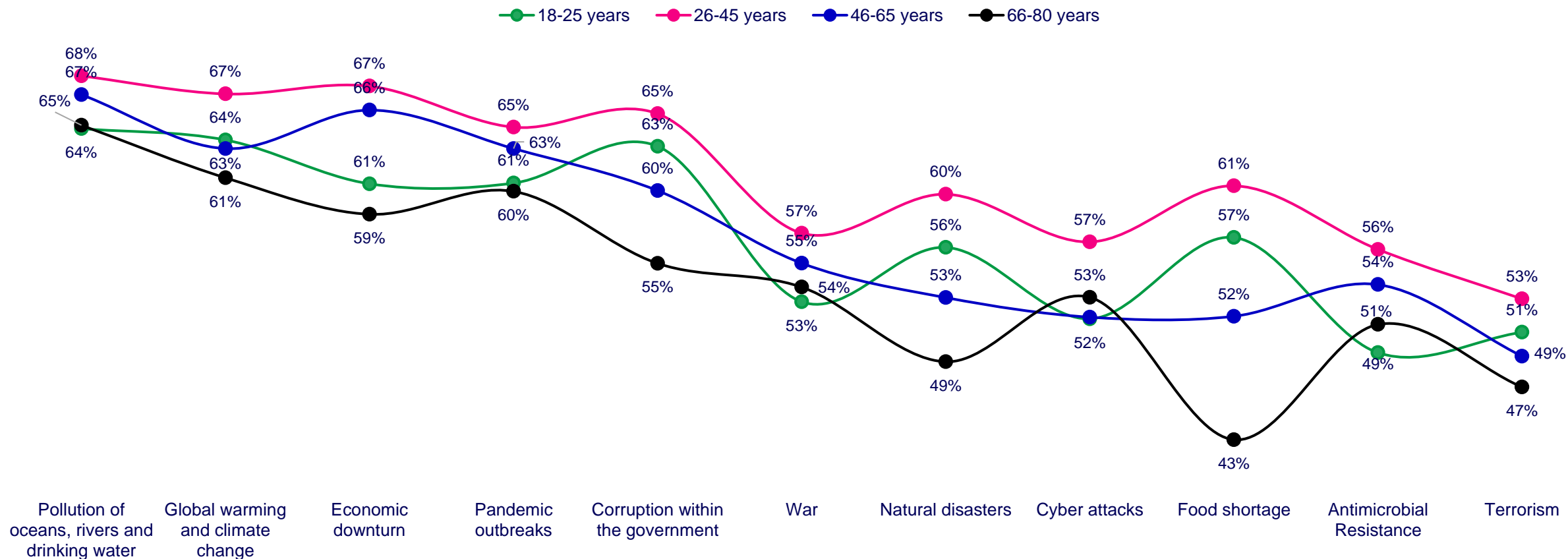


# Women are overall more worried about public health threats than men



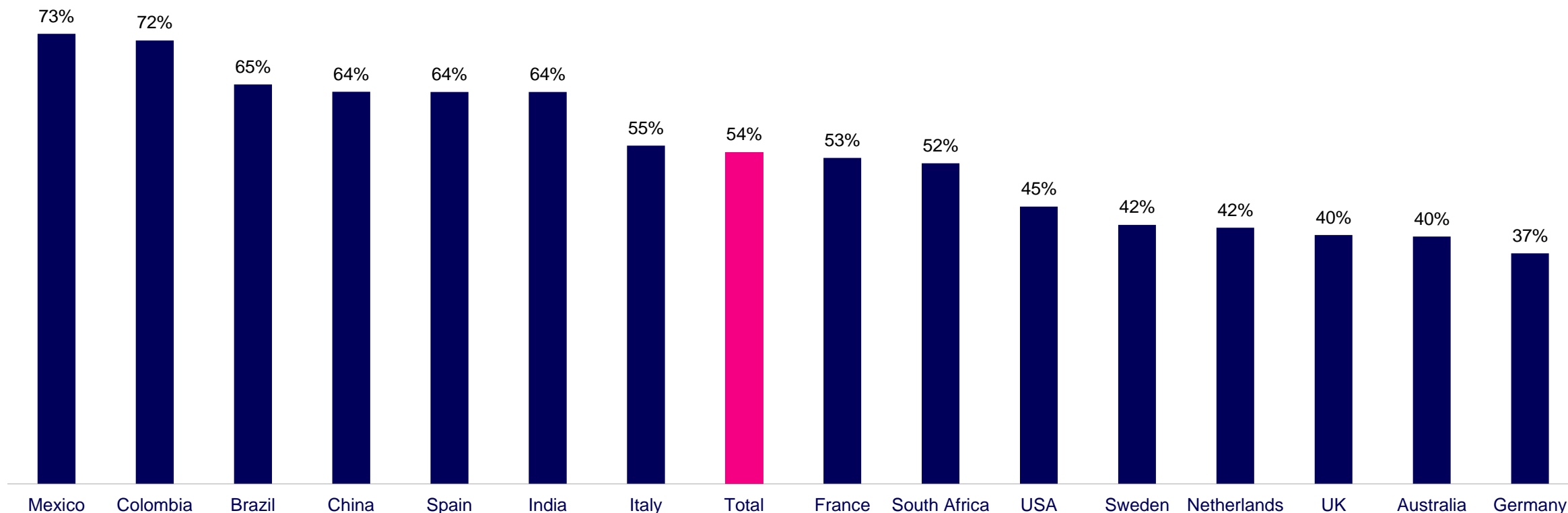
# Older are generally less concerned about public health threats – except for AMR, war and cyber attacks

People aged 26-45 are the most worried about global health threats.



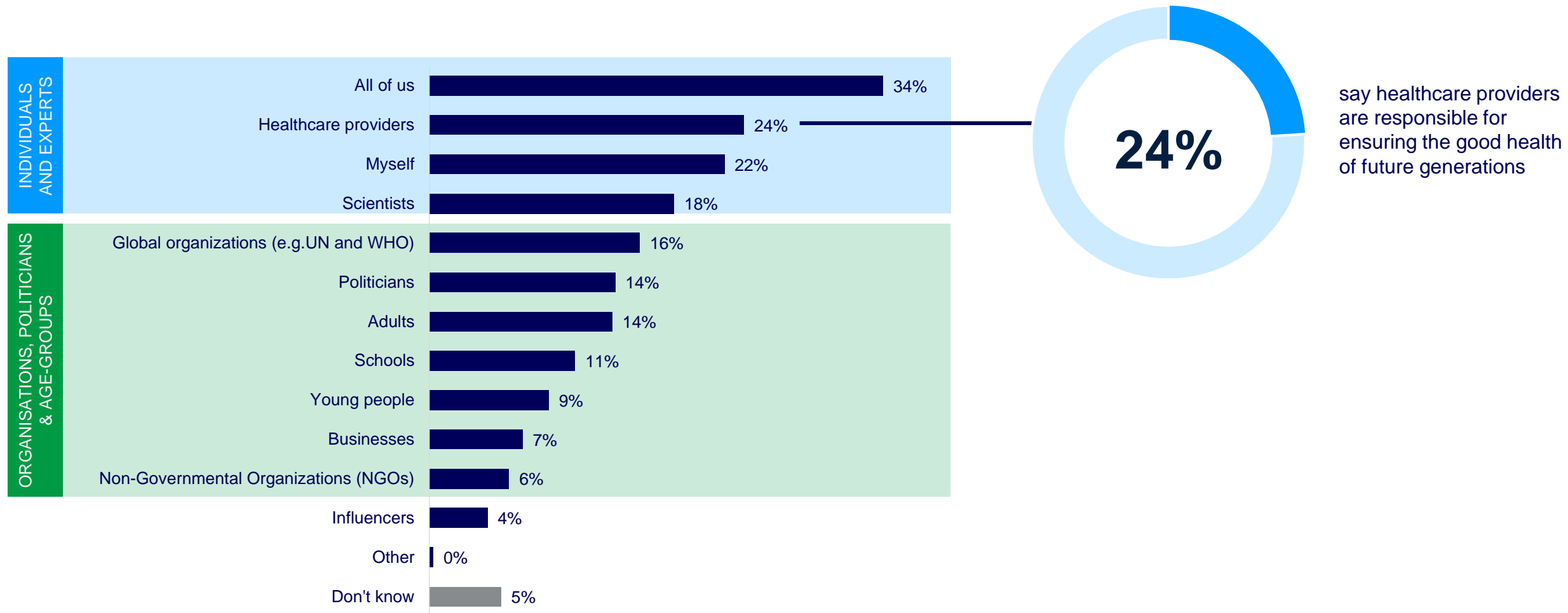
# Mexico and Colombia most worried about antimicrobial resistance – Australia and Germany the least

Worry about antimicrobial resistance  
(answered 4 or 5)



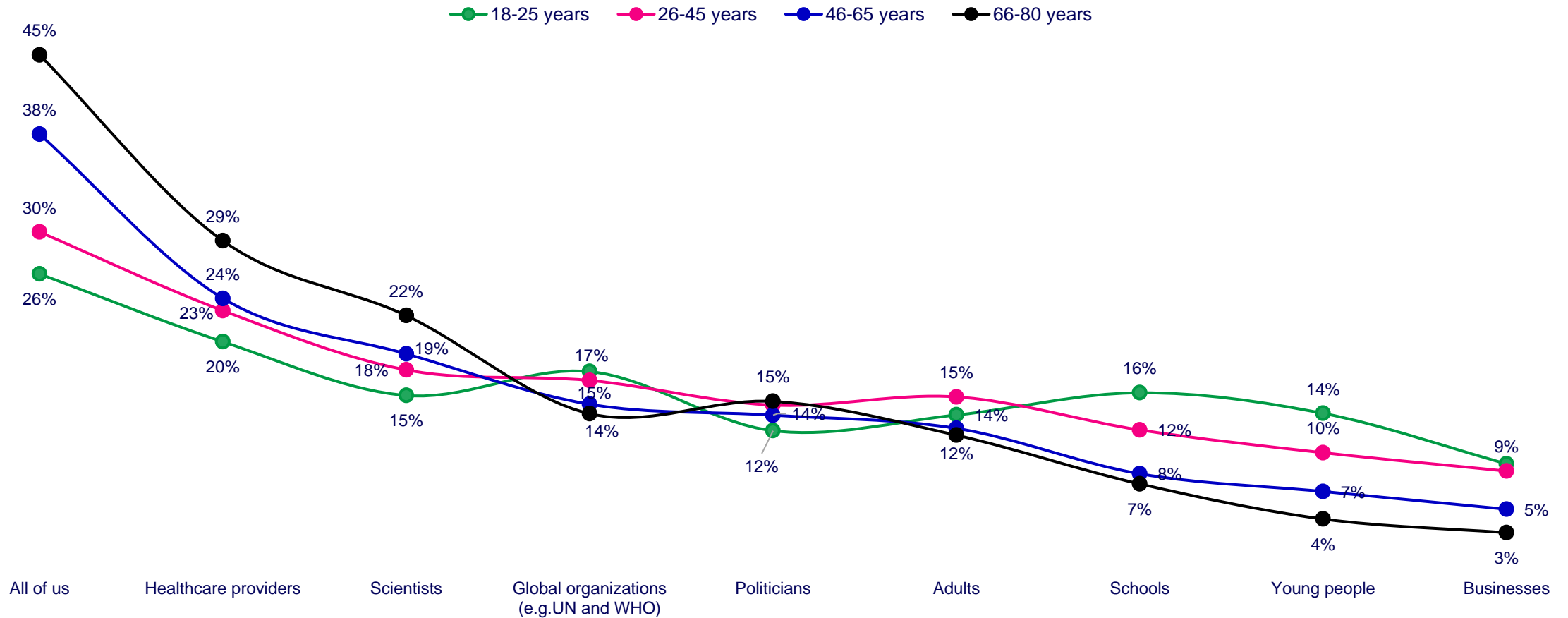
# People place the responsibility for good health of future generations with individuals and experts

Low responsibility with organizations, politicians and youth.



# Elders are most likely to hold everyone responsible for the good health of future generations

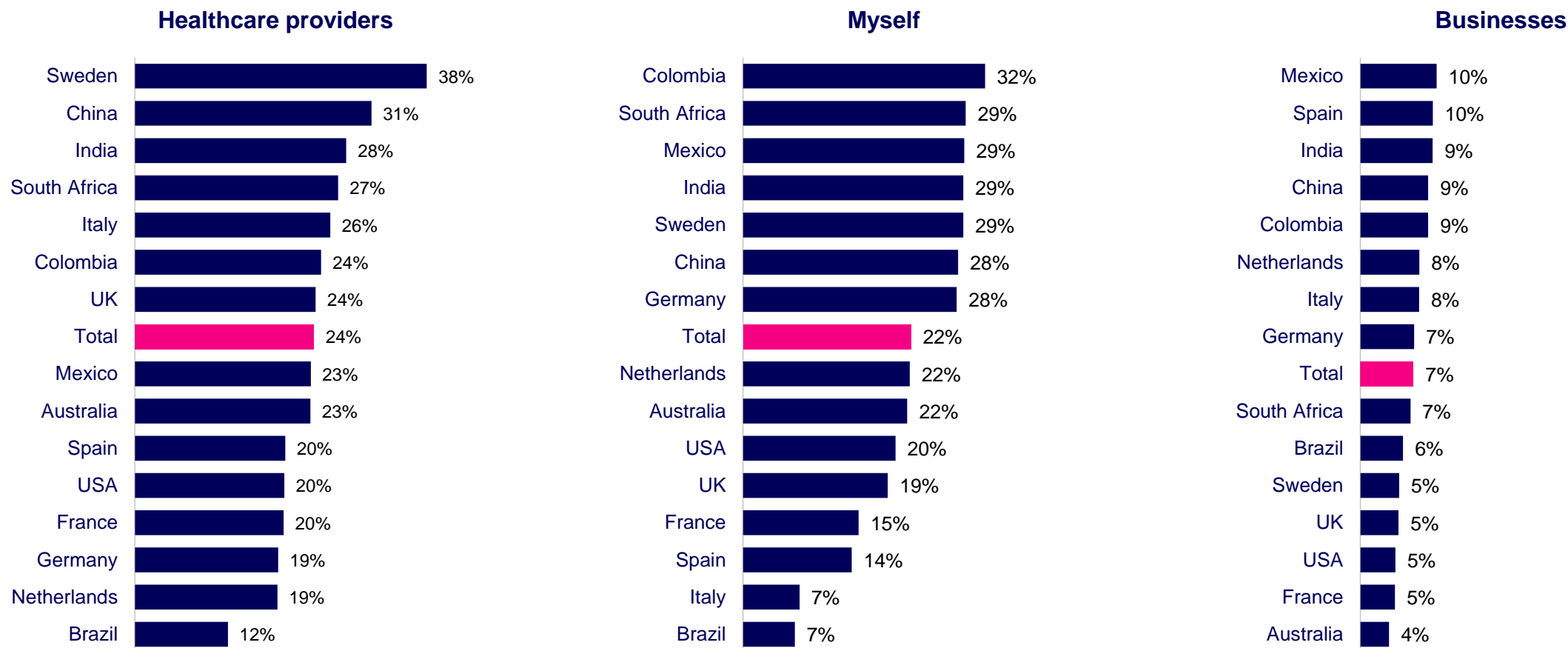
Schools and businesses are more likely to be held responsible by younger age groups, even though to a low extent in comparison to other stakeholders





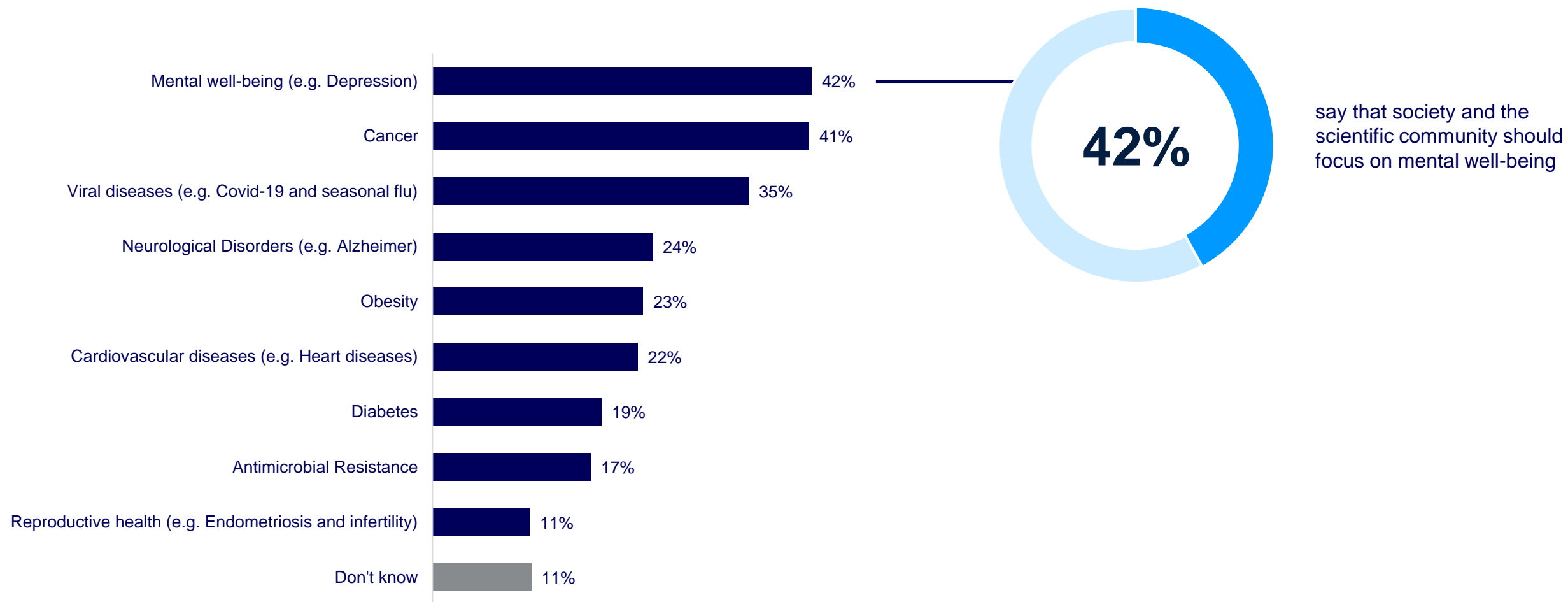
# Sweden locates the responsibility most with healthcare providers and Colombia locates it with individuals

Businesses are not seen as a key stakeholder in ensuring the good health of future generations across all countries.



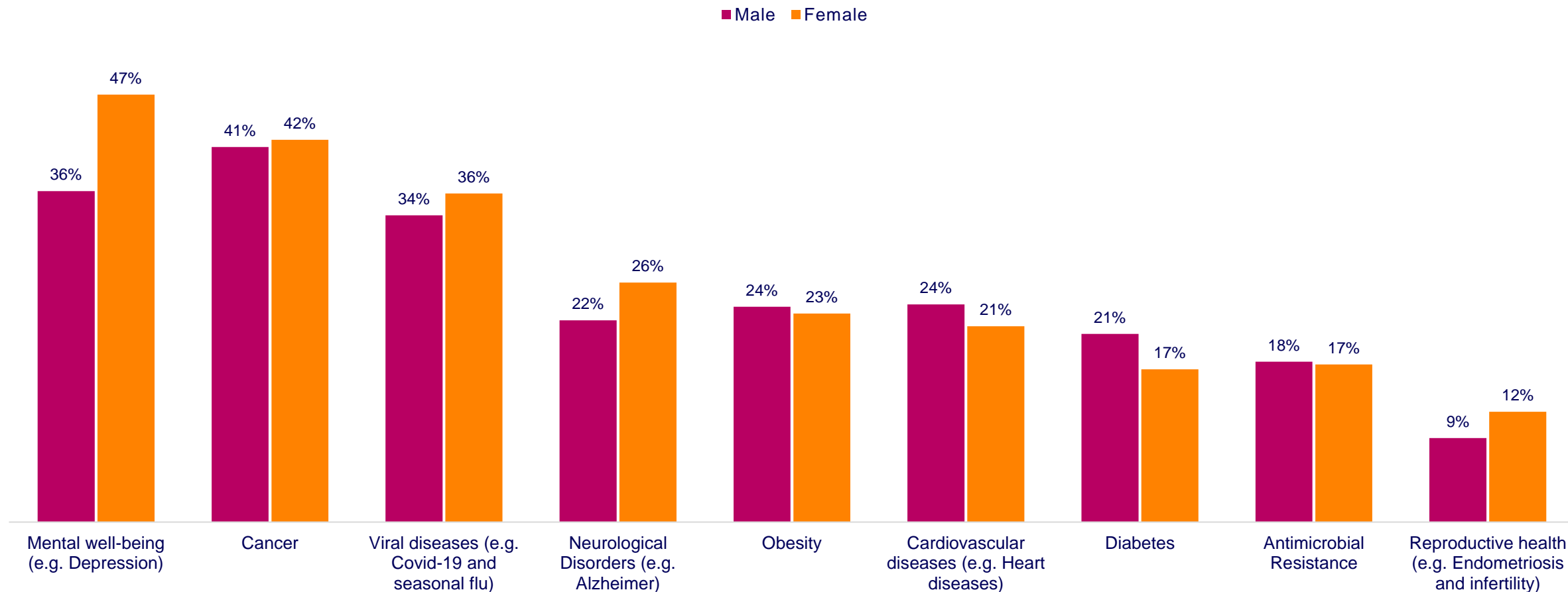
# Mental health and cancer are the biggest concerns for the future of health and hygiene

Almost 1 in 5 say that AMR should be of greater concern for society and the scientific community. Only 1 in 10 pick reproductive health.



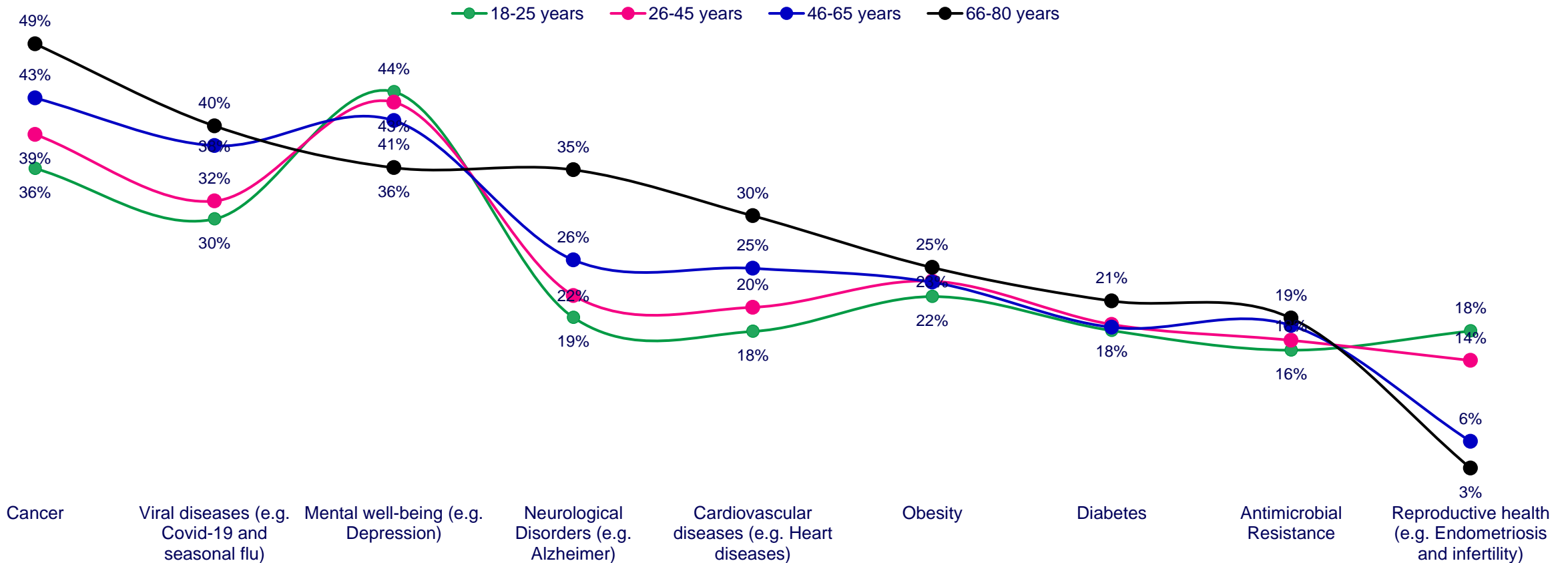
# Women are more concerned about mental well-being, neurological disorders and reproductive health

Men are more concerned than women about cardiovascular diseases and diabetes.



# All age groups agree that more needs to be done for cancer, mental well-being and viral diseases

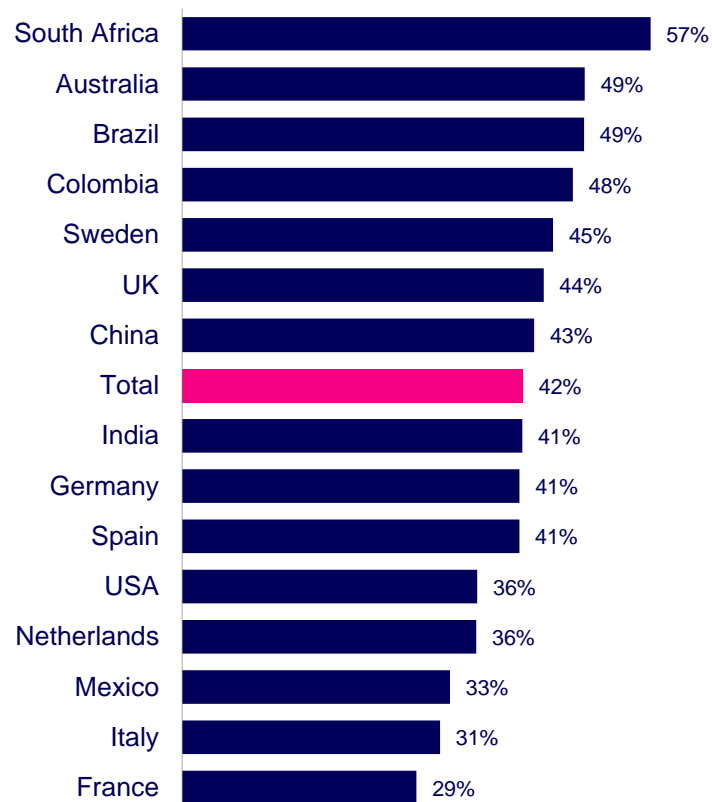
Reproductive health is of most concern to younger age groups.



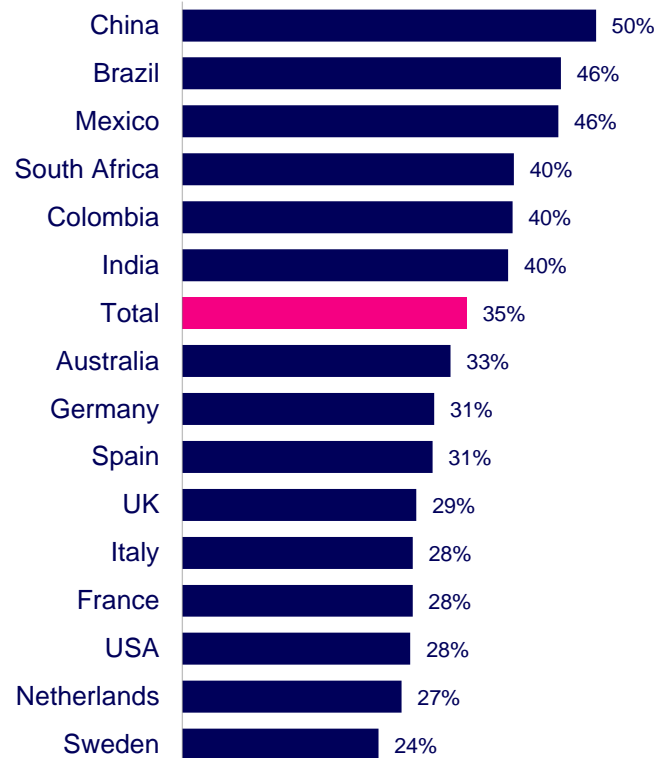
# Concern for viral diseases and AMR is high in China and Mexico

Concern for mental well-being is high in South Africa, Australia, Brazil and Colombia.

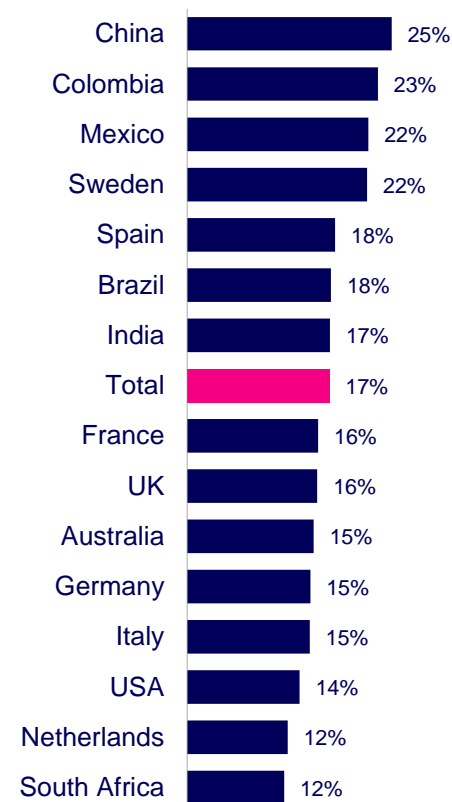
### Mental well-being (e.g. Depression)



### Viral diseases (e.g. Covid-19 and seasonal flu)



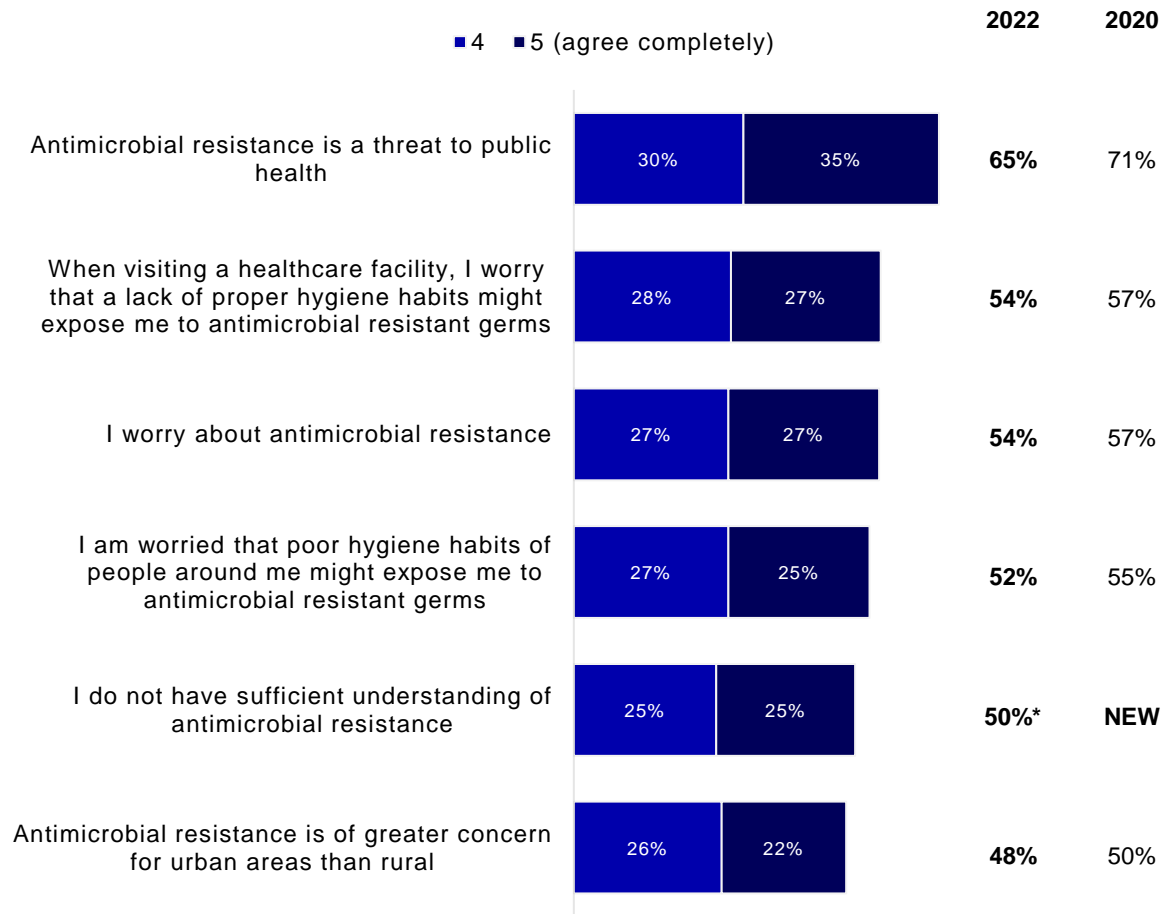
### Antimicrobial Resistance





# 1 in 2 worried lack of proper hygiene might expose them to antimicrobial resistant germs at healthcare facilities

1 in 2 do not trust hygiene of people around them.



# The young and the people living in cities are more worried that poor hygiene habits of people around them might expose them to AMR

Agree completely

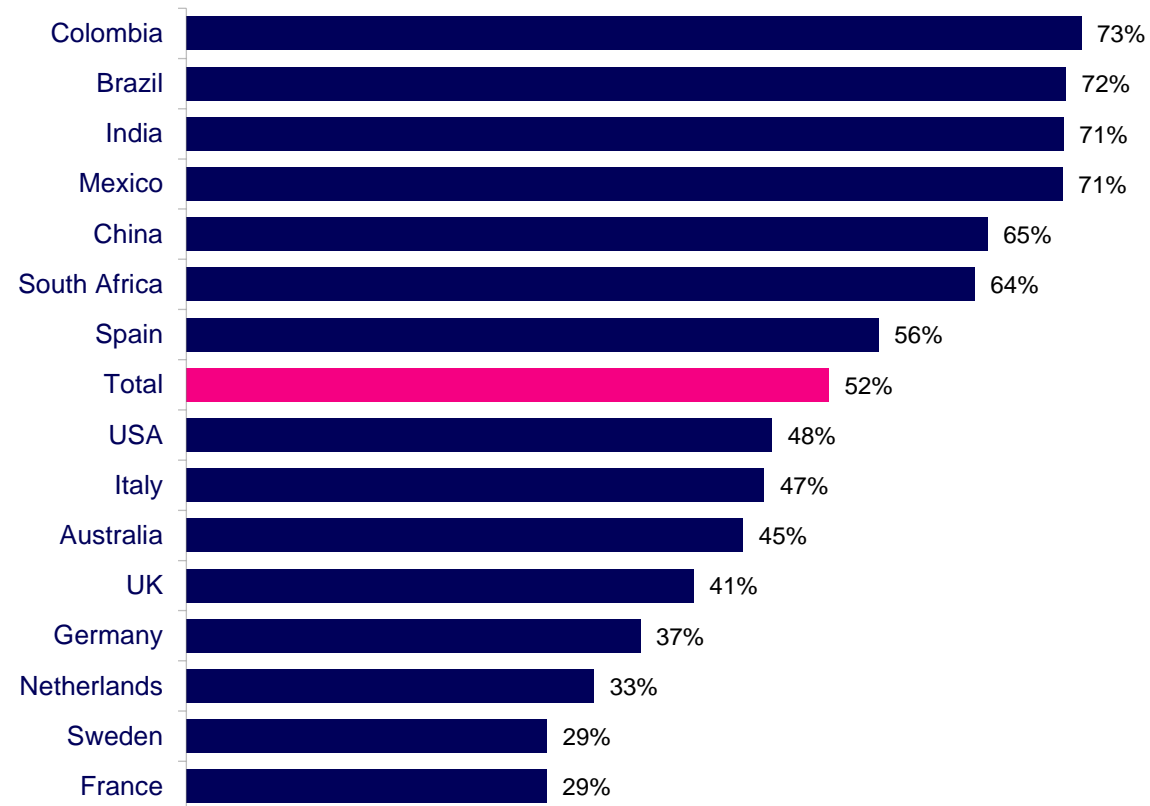
I am worried that poor hygiene habits of people around me might expose me to antimicrobial resistant germs



# Columbia, Brazil, India and Mexico are the most worried about poor hygiene habits of people around them

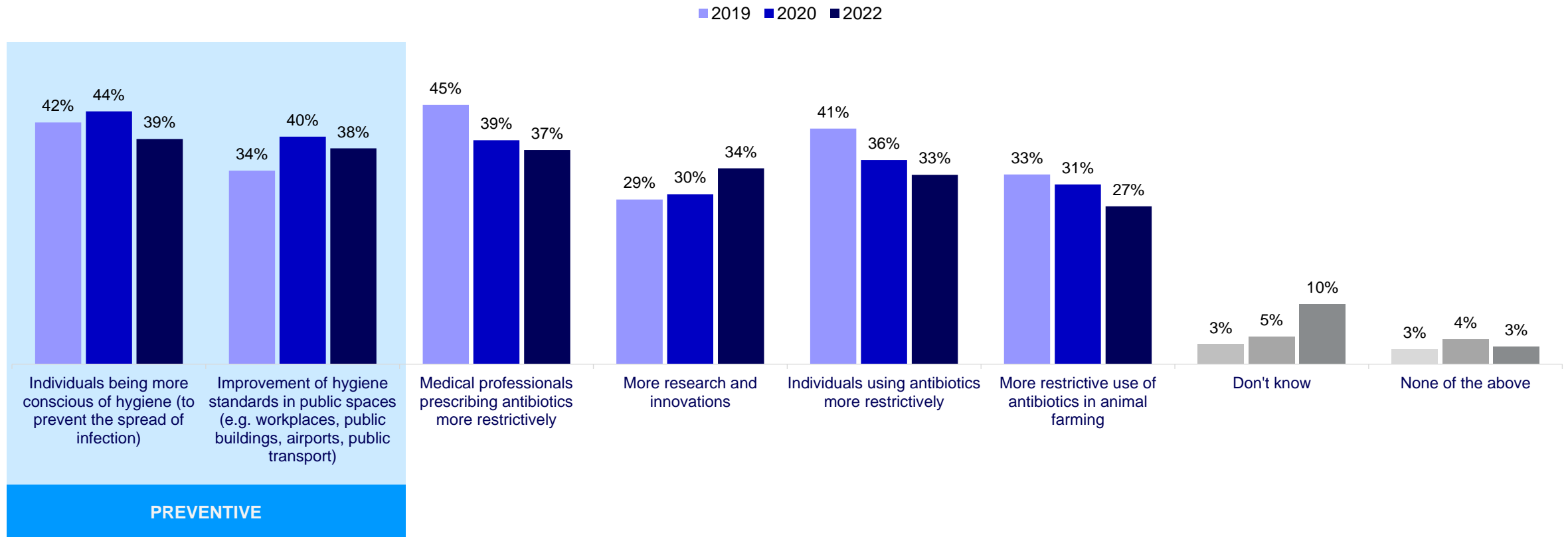
Swedes and French are the least worried

Worried about poor hygiene habits of people around them  
(answered 4 or 5)

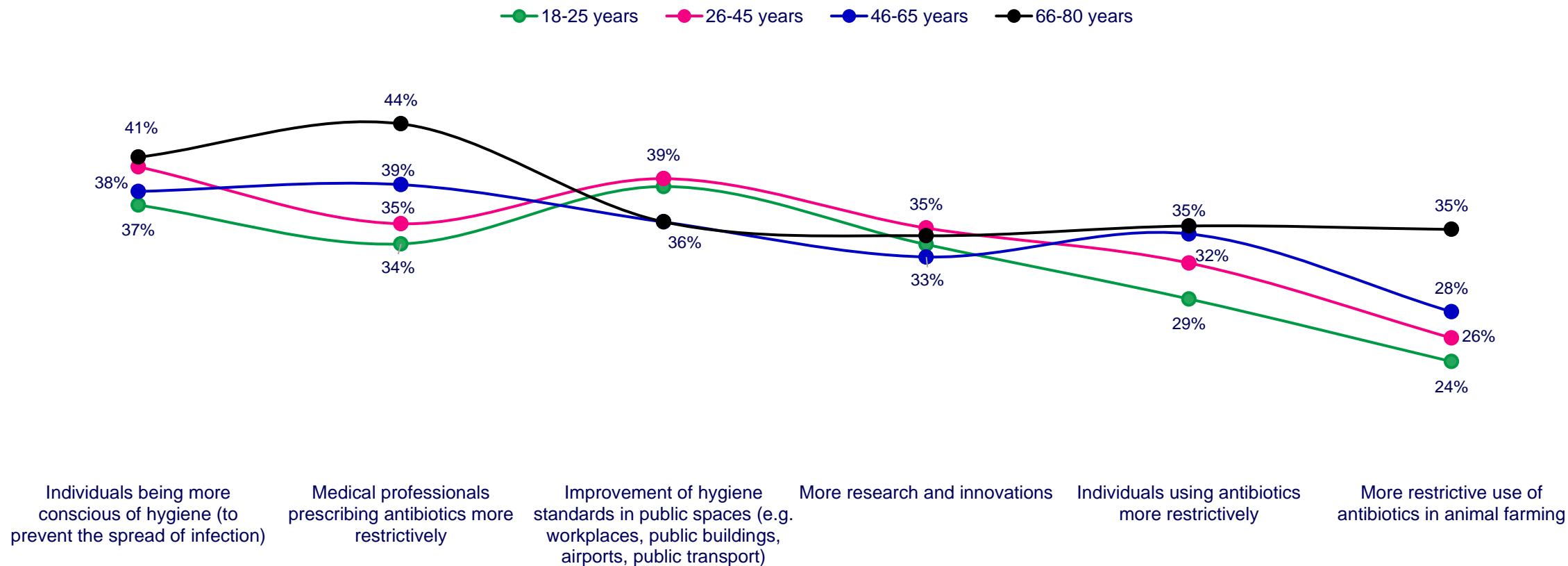




# More advocate for preventive measures to combat increase in resistance to antibiotics



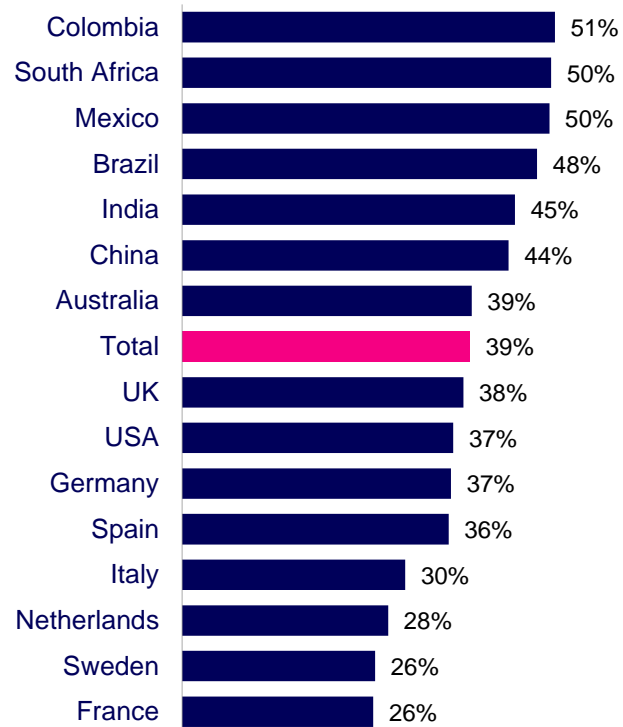
# Elders vouch most for actions by medical professionals, while younger want better hygiene in public spaces to combat antimicrobial resistance



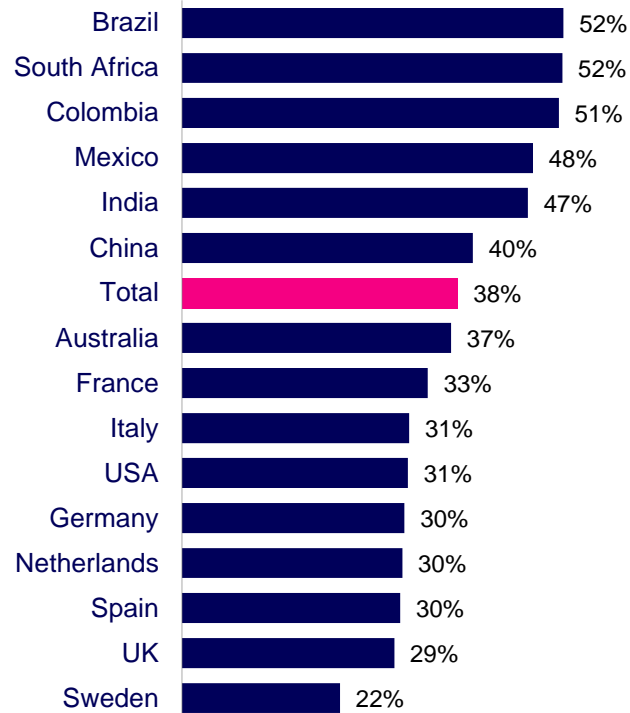
# Colombia, South Africa and Brazil believe preventive measures would make the biggest difference

China and Sweden say medical professionals prescribing antibiotics more restrictively would help to stop the spread of antimicrobial resistance the most.

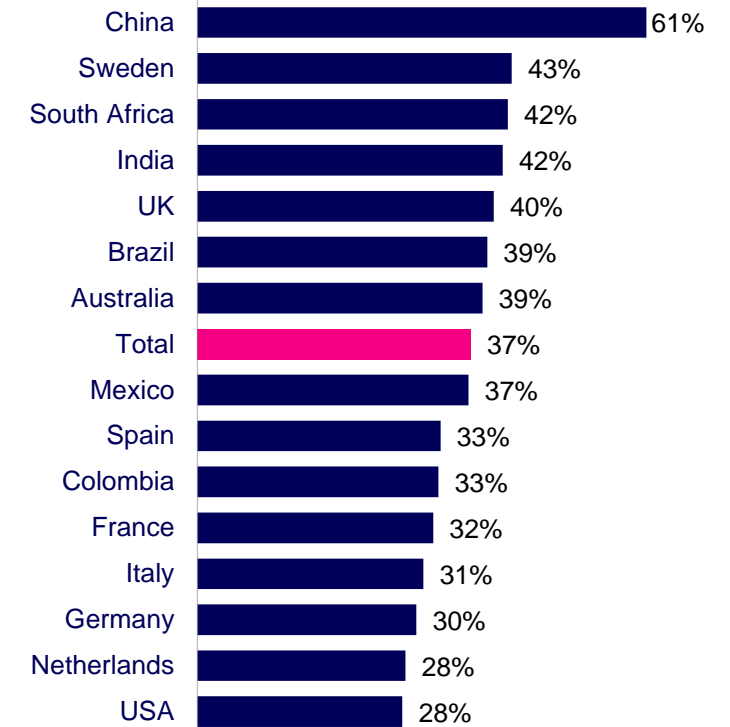
**Individuals being more conscious of hygiene (to prevent the spread of infection)**



**Improvement of hygiene standards in public spaces (e.g. workplaces, public buildings, airports, public transport)**



**Medical professionals prescribing antibiotics more restrictively**





# HEALTH THREATS OF TOMORROW

## Key Highlights



**56%**

say they are worried about the threat of war, food shortage (55%) and AMR (54%) to public health – and all have increased since 2020.



**54%**

are worried that lack of proper hygiene at healthcare facilities as well as among people around them (52%) might expose them to antimicrobial resistant germs.



**24%**

say healthcare providers are responsible for ensuring the good health of future generations. People generally locate the responsibility of good health of future generations with individuals and experts.



**42%**

say society and the scientific community should focus on mental well-being the most in the coming five years. There is consensus among all age groups that mental well-being, cancer and viral diseases need the most attention.

## Contextual Summary

**The list of global threats to public health is long and ever-present. Trust in governments is declining and people are increasingly putting their trust in experts.**

Everyday professionals work to improve the lives and health of people by discovering new cures and health practices. The recent pandemic has put the spotlight back on medical sciences. However, much work remains to be done. New global health issues are on the rise and we need to know where our focus should lie going forward and who should be responsible for ensuring a healthier tomorrow?

While war and food shortage are now perceived with greater concern – the threat from pandemics and AMR to public health persists. People are worried about hygiene in crowds and public spaces and the mental toll of constant danger is beginning to show. Experts are increasingly gaining more public trust to deal with these threats in comparison to politicians, businesses and organizations.

# Redesigning Public Spaces

6

# 13%

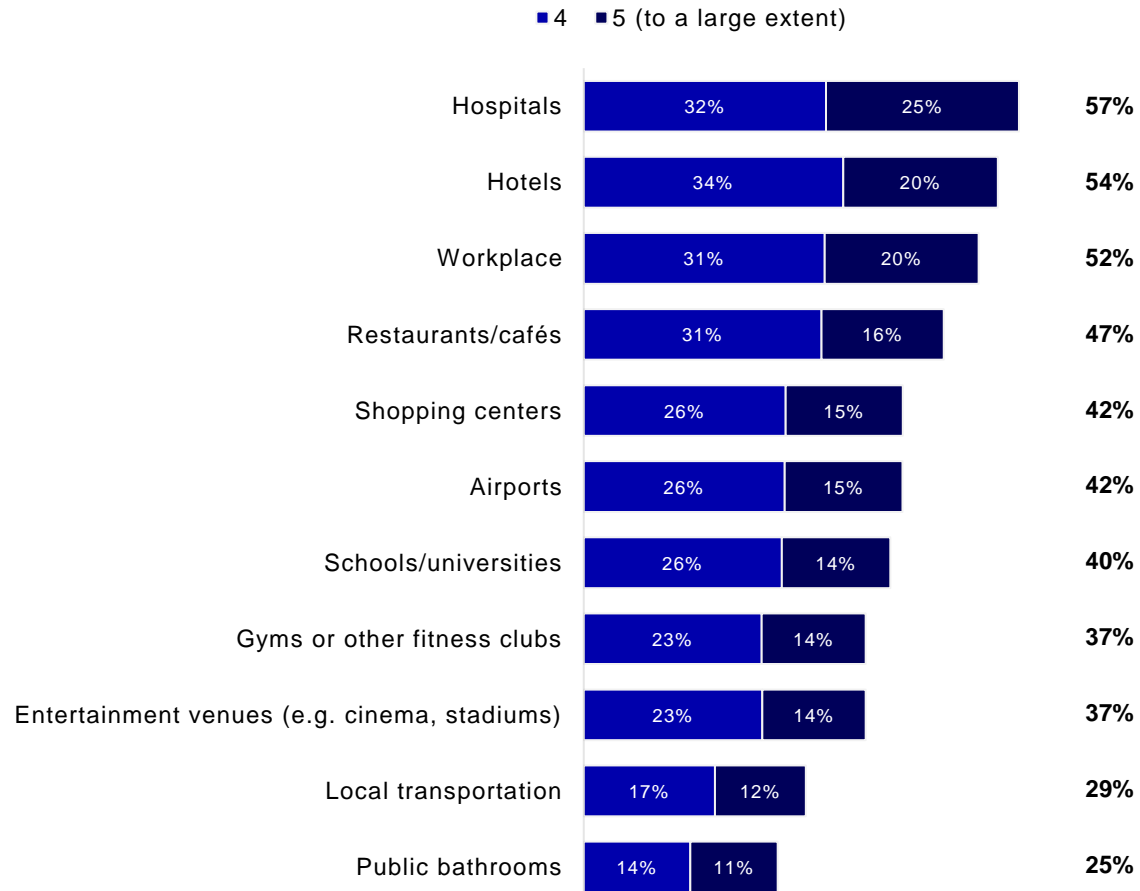
of people aged 66-80 years old feel safe about hygiene standards in public washrooms





# Only 1 in 4 feel safe about hygiene in public bathrooms and 3 in 10 in public transport

Hospitals, hotels and workplaces are the safest areas to visit in terms of hygiene.

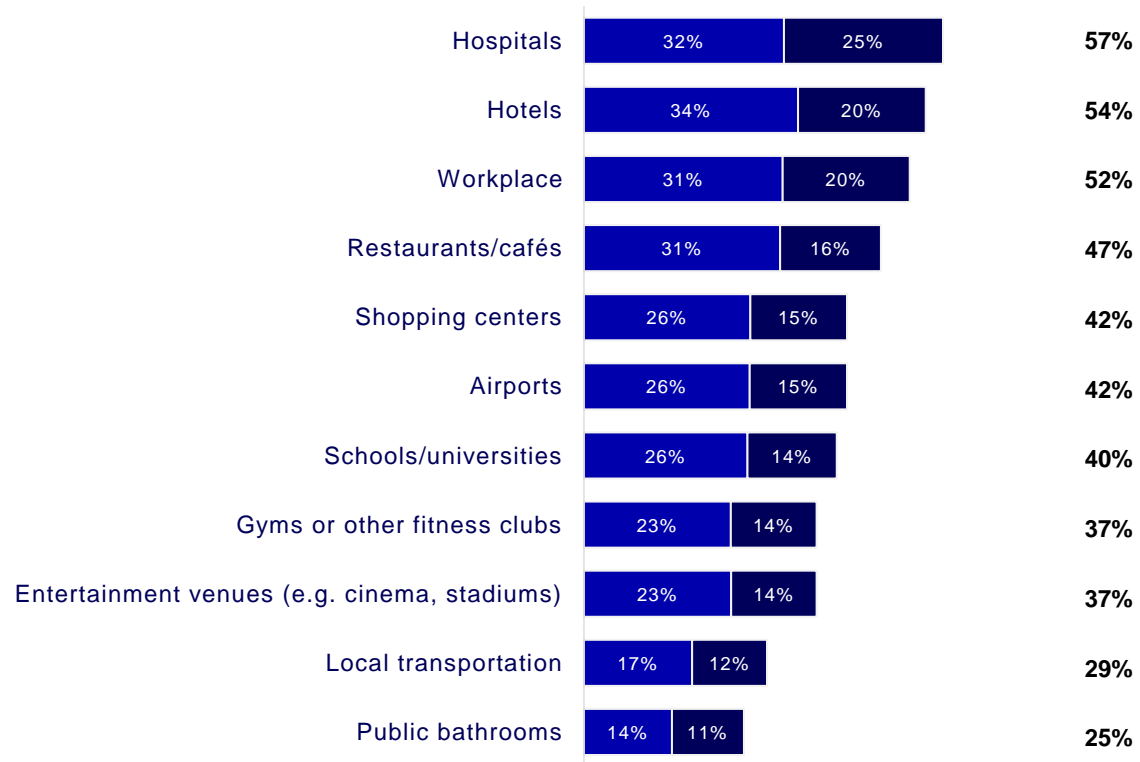


# Fewer feel safer about hygiene in public washrooms after COVID-19 than those with high expectations

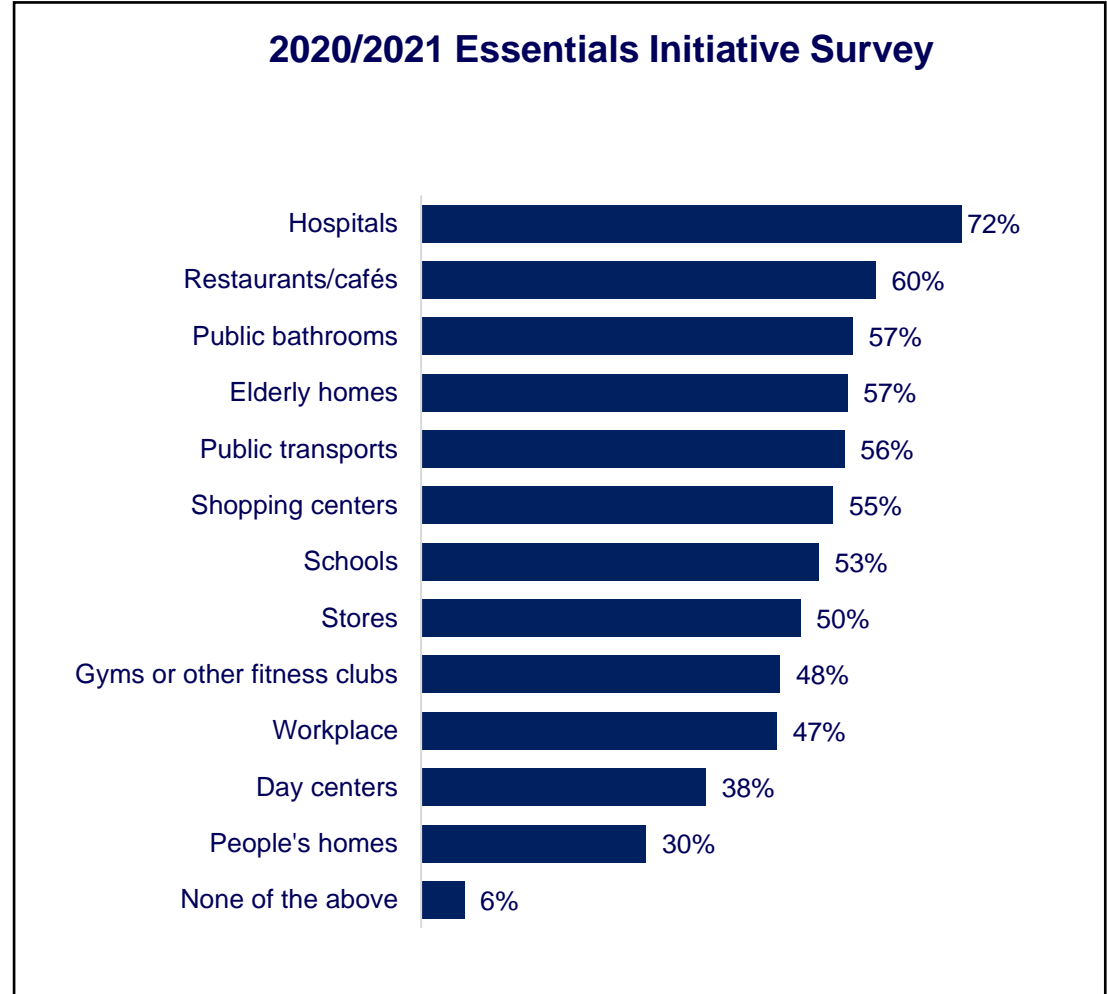
Compared to the Essentials Initiative Survey, people report a lower level of safety when it comes to hygiene standards in public washrooms, than the amount of having higher expectations on the hygiene standard in public washrooms after COVID-19.

## 2022 Hygiene and Health Survey

■ 4 ■ 5 (to a large extent)



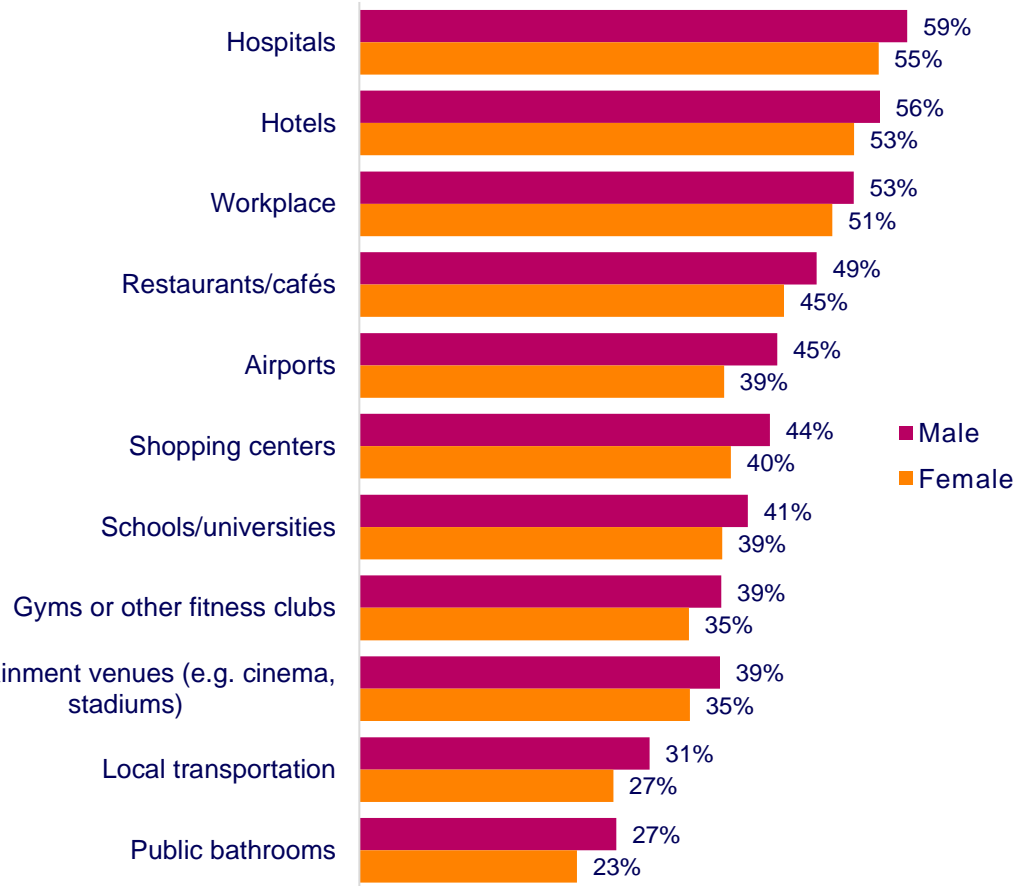
## 2020/2021 Essentials Initiative Survey





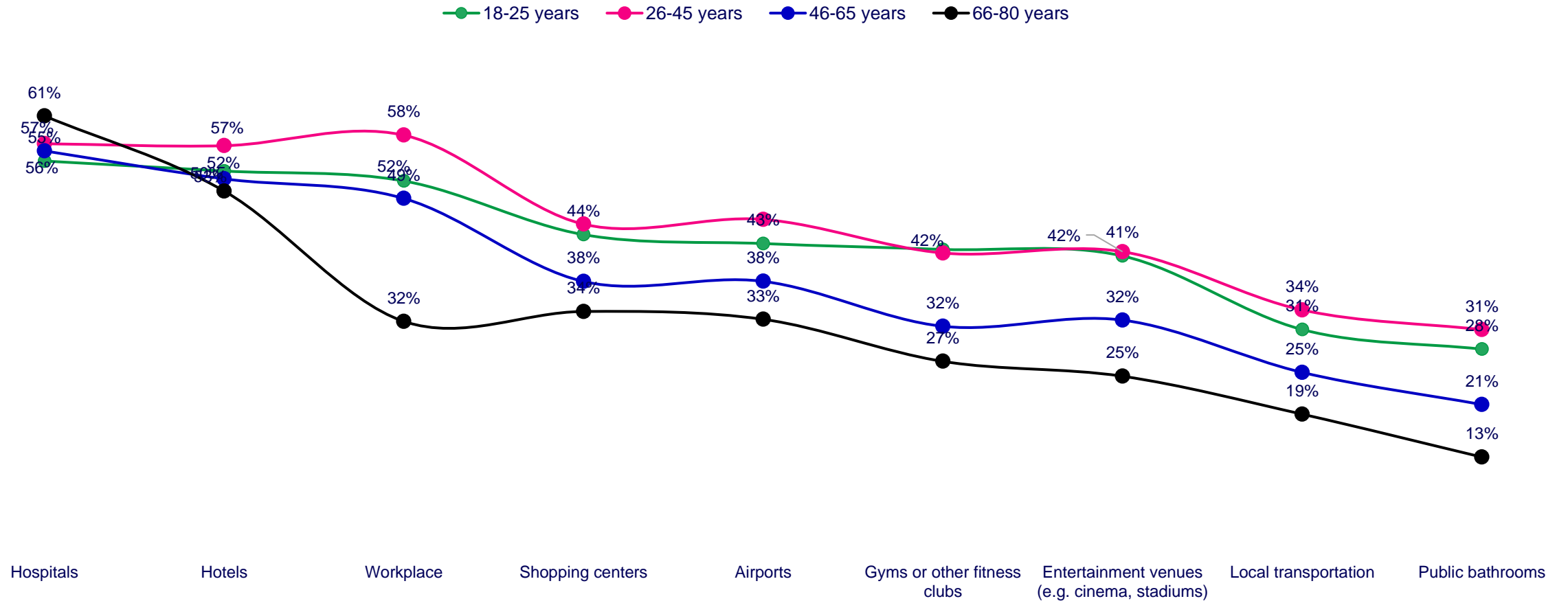
# Overall, men feel safer in public spaces than women in terms of hygiene standards

Feel safe (4 or 5)



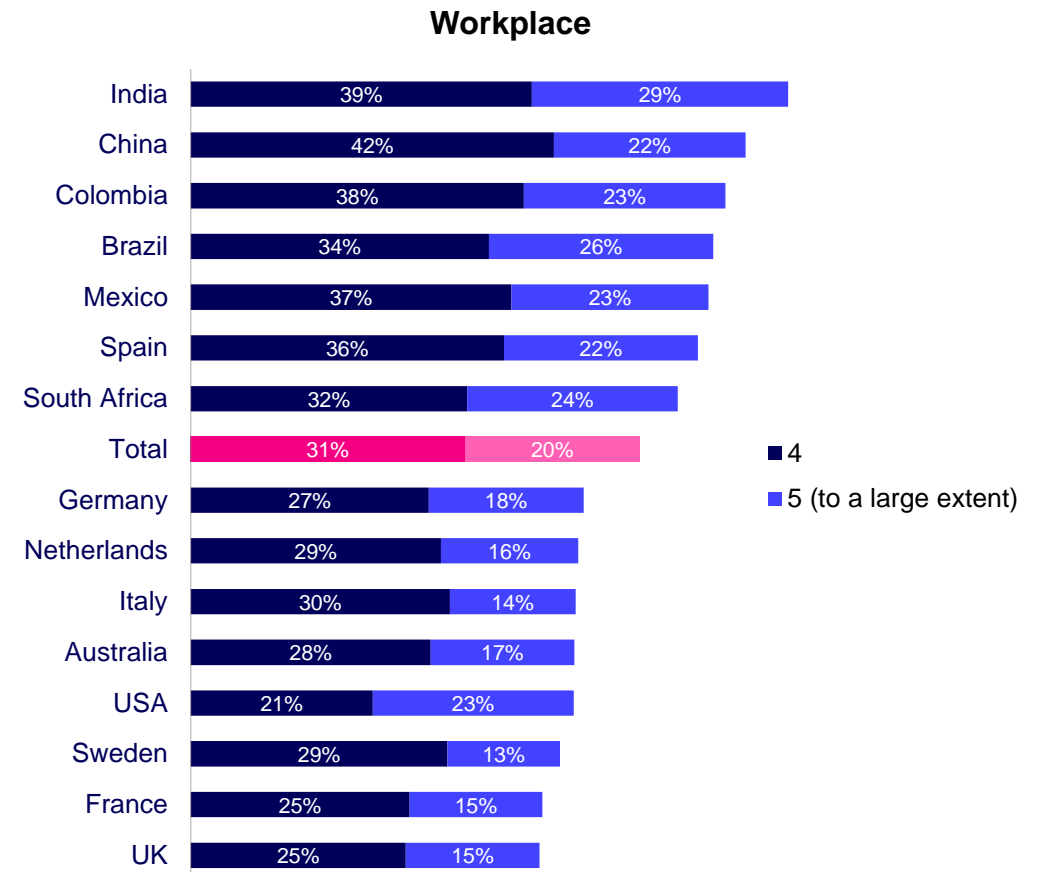
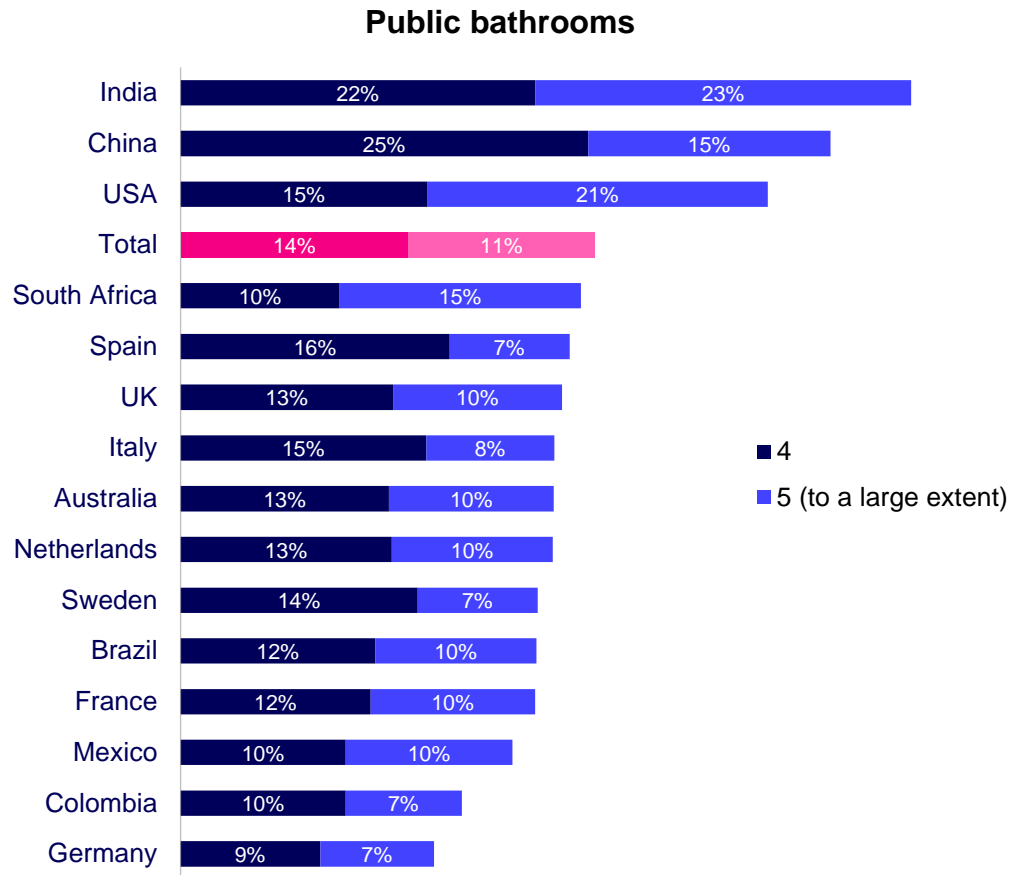


# Older feel less safe in public spaces compared to younger – only 1 in 10 elders feel safe in a public bathroom



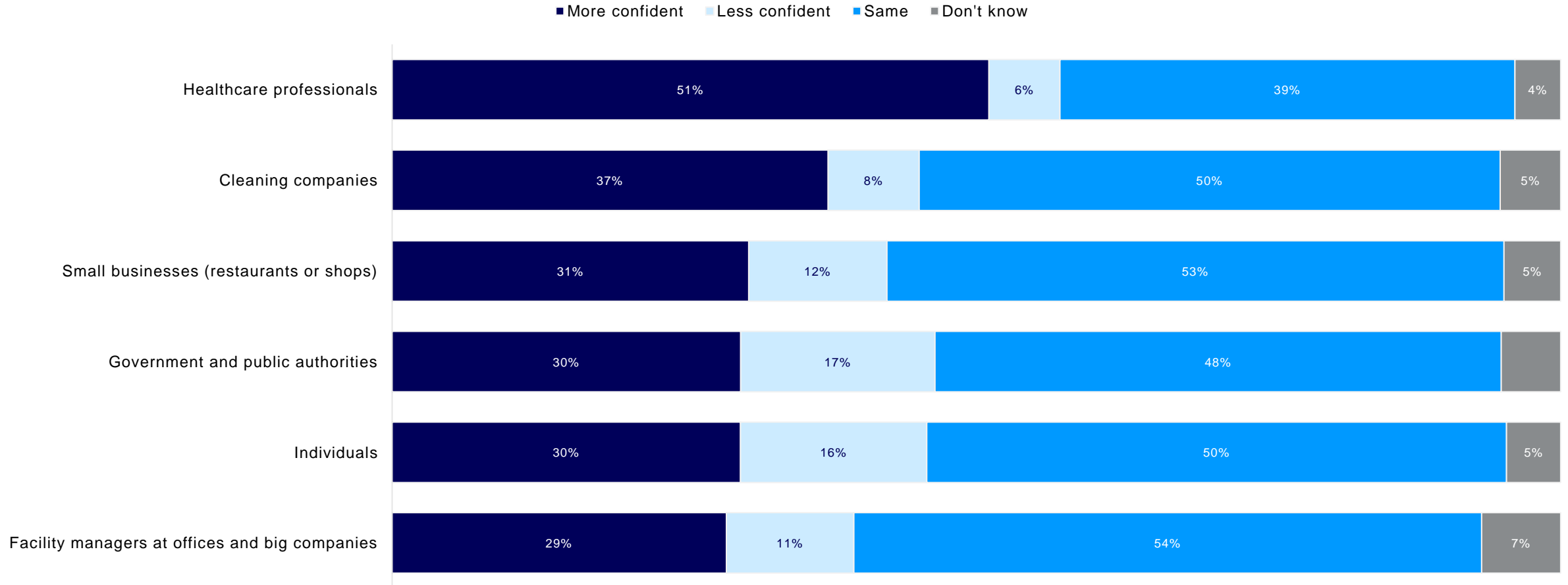
# Germans feels the least safe when it comes to hygiene standards in public bathrooms

UK, France and Sweden are at the bottom when it comes to perceived safety of hygiene standards at the workplace.



# Due to the pandemic, 1 in 2 are more confident in healthcare professionals having higher standards of hygiene

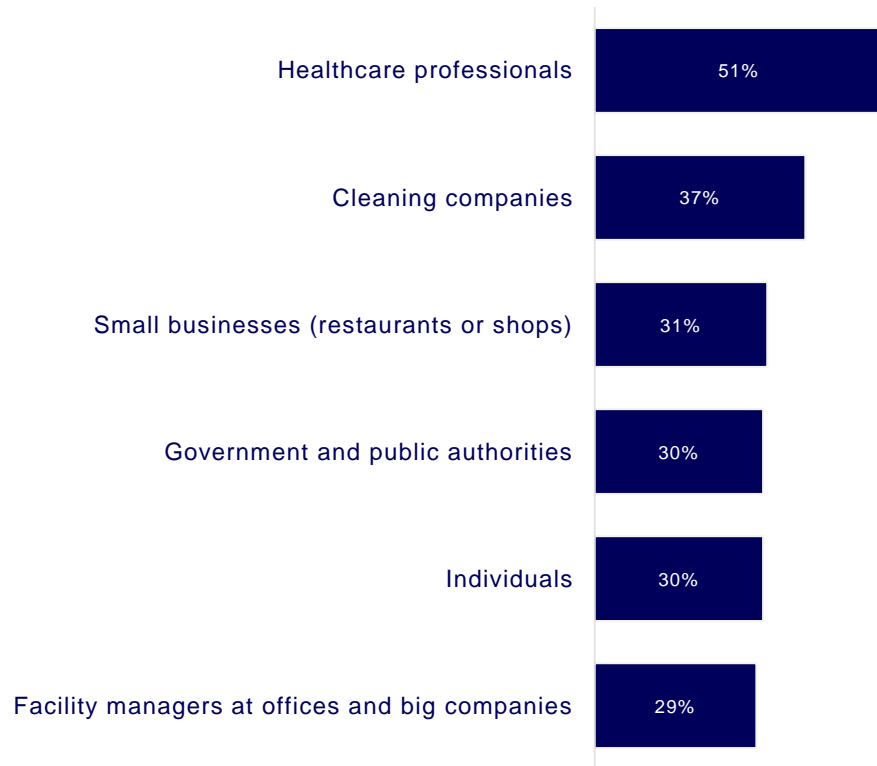
Around 1 in 3 are more confident in cleaning companies, small businesses, government and public authorities, individuals and facility managers to keep a higher standard of hygiene following the pandemic.



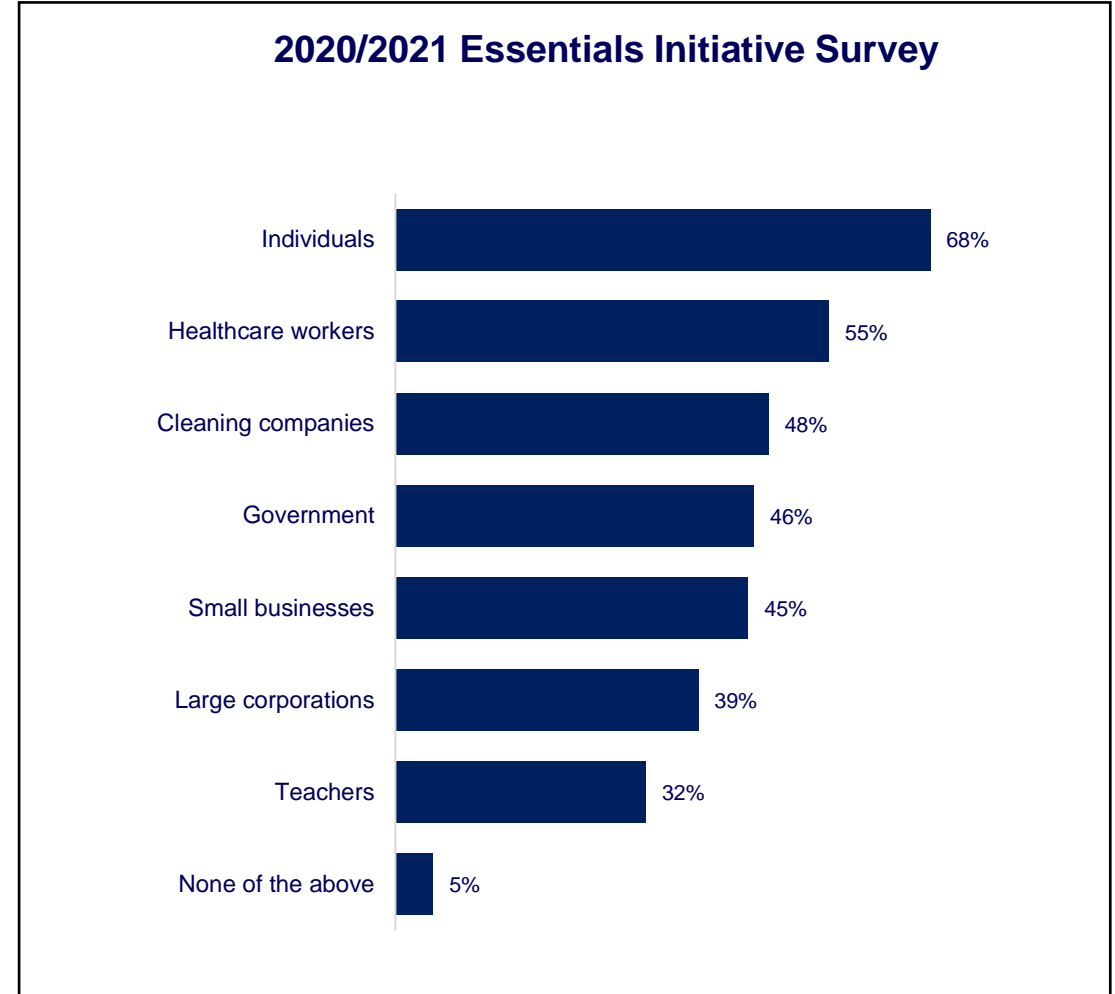
# Individuals were considered most important to keep high hygiene standards – now 1 in 3 say they are more confident in individuals to keep a high standard of hygiene

2022 Hygiene and Health Survey

Base: More confident



2020/2021 Essentials Initiative Survey



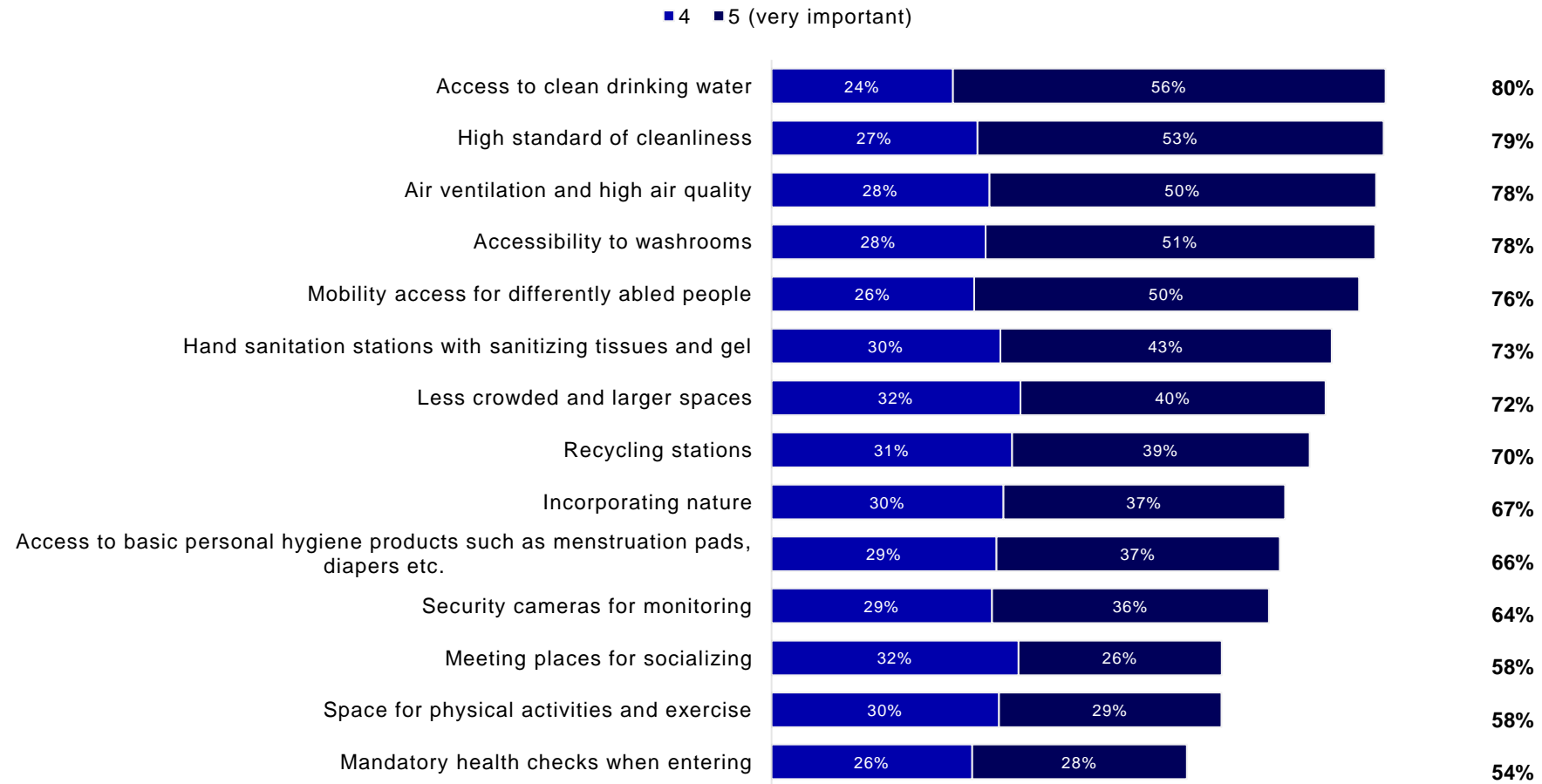
# Lowest confidence are in individuals keeping a higher standard of hygiene among European countries





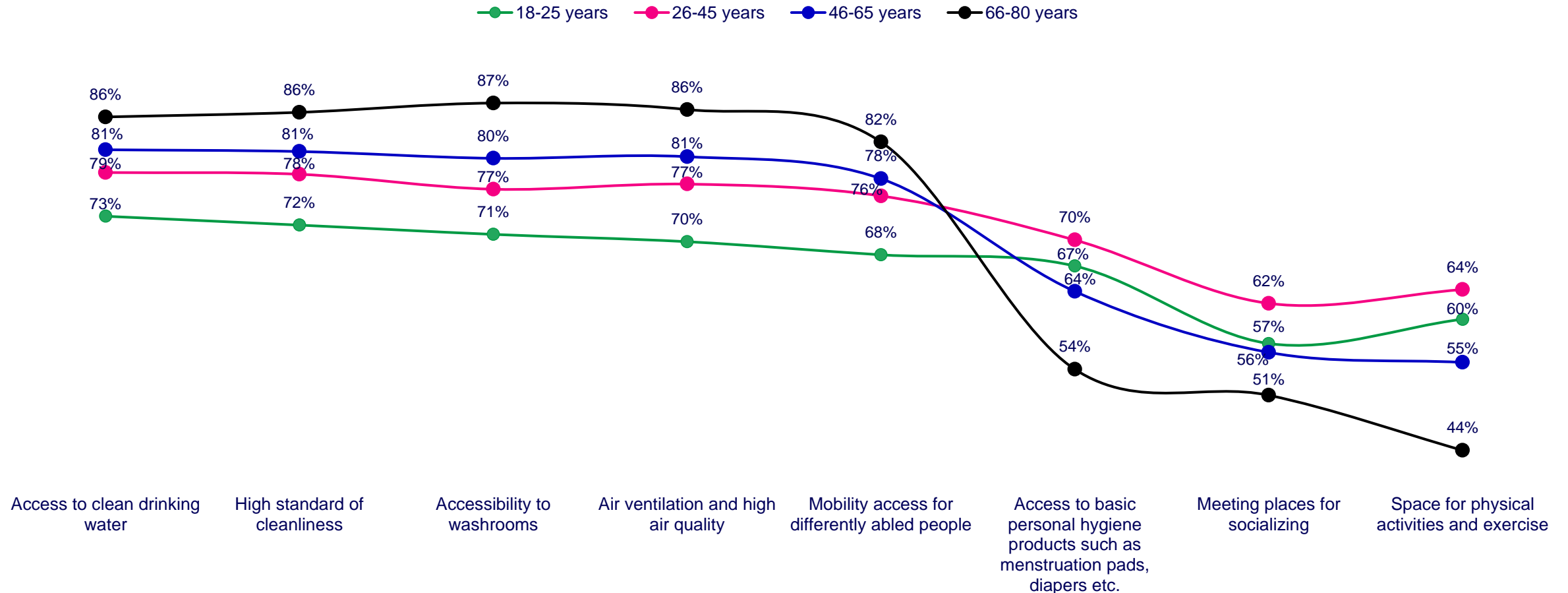
# 2 in 3 say access to basic personal hygiene products in future public spaces is essential for well-being

8 in 10 say accessibility to washrooms is essential to well-being.



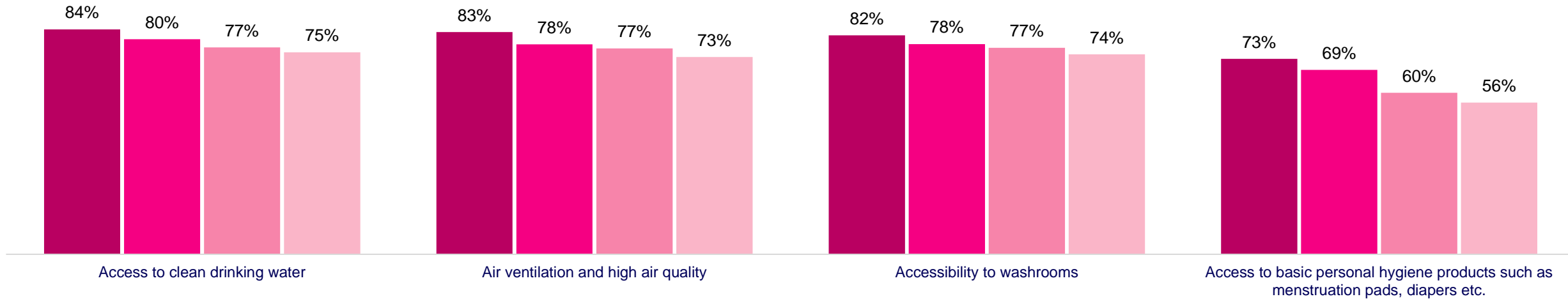
# The older you are the higher demands you have on public spaces regarding accessibility and cleanliness

Younger see social areas as an essential part of public spaces more than seniors.



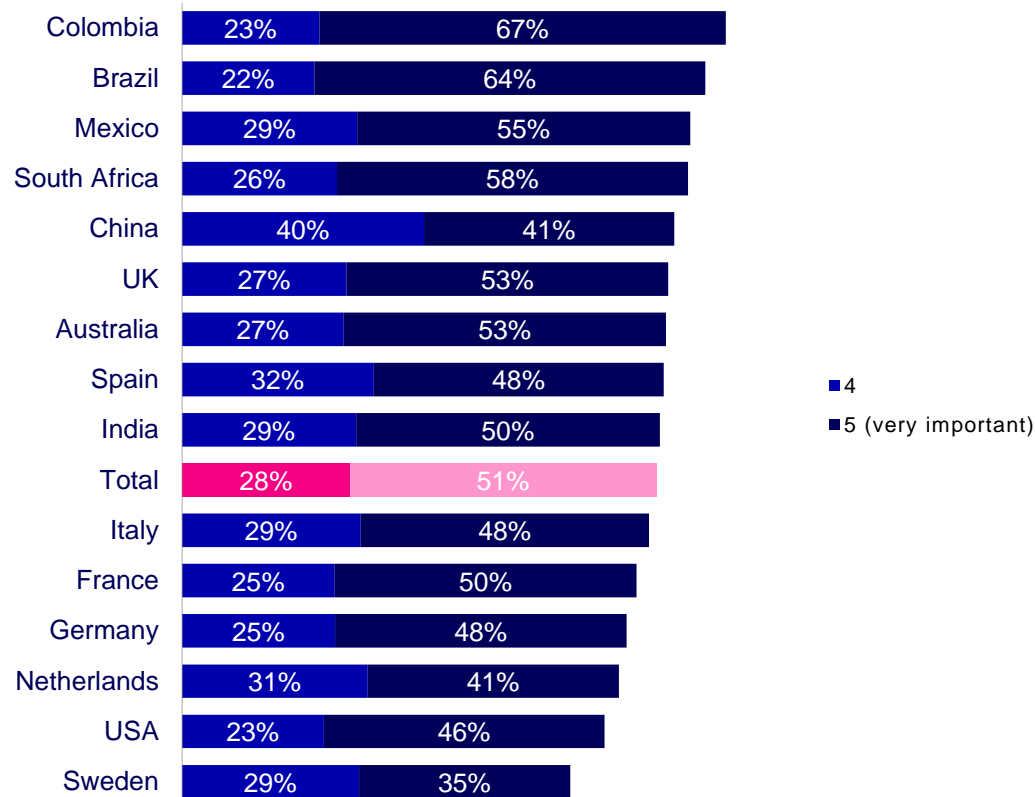
# Urban areas have higher demands on accessibility in public spaces than rural areas

■ Metropolis (population +1 million) ■ City (population between 100.000 and 1 million) ■ Town (population between 10.000 and 100.000) ■ Village (population less than 10.000)

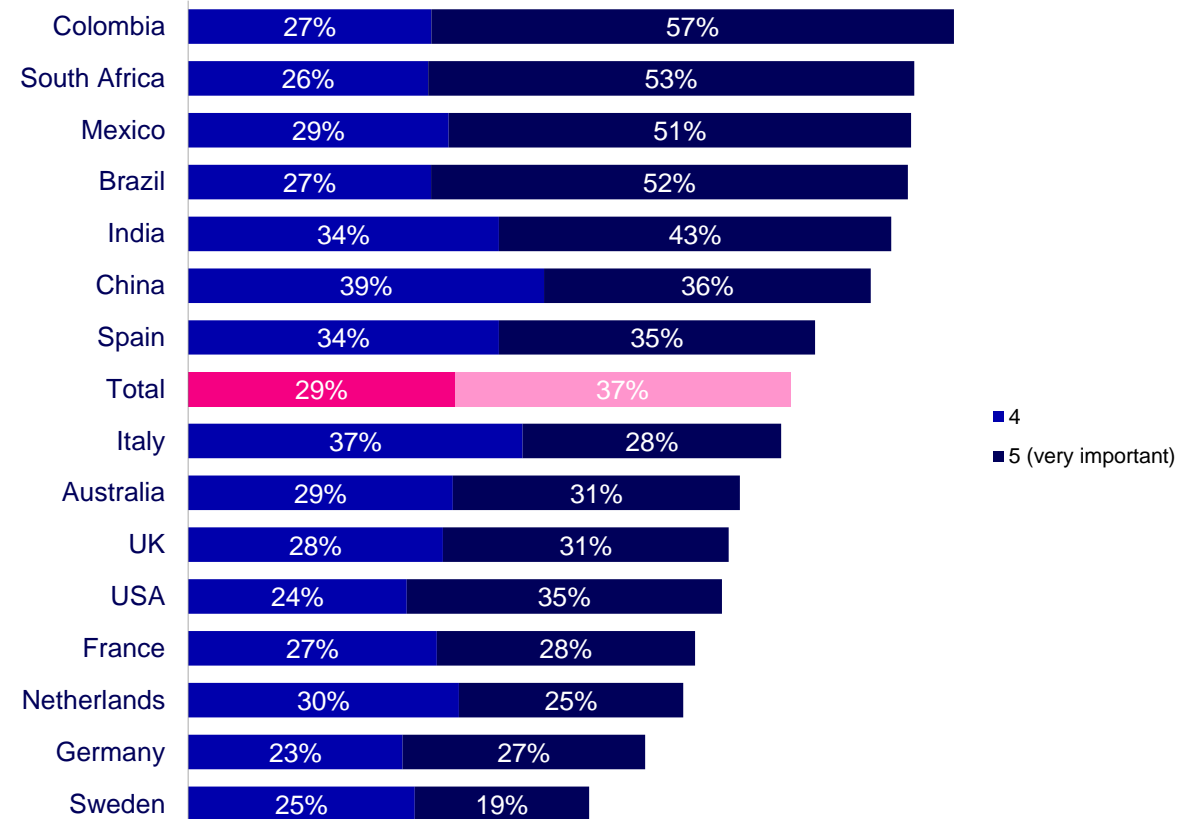


# Accessibility to washrooms and basic personal hygiene products are high on the agenda in Colombia

Accessibility to washrooms

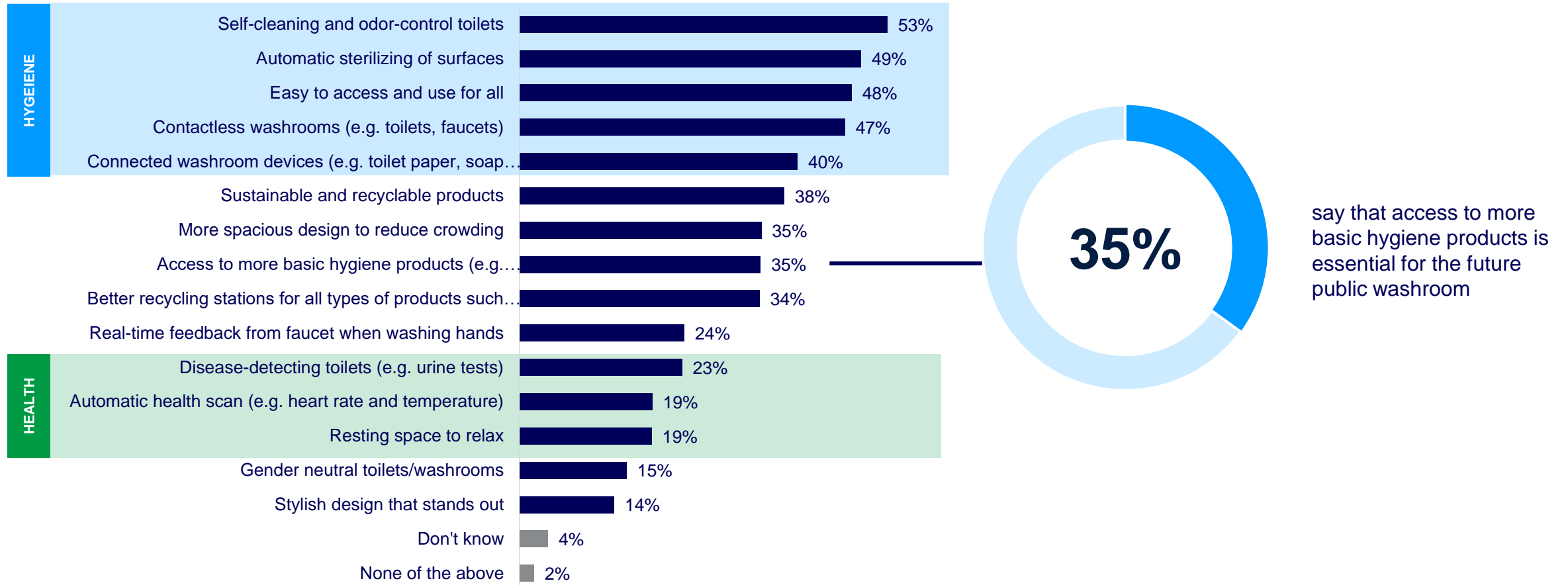


Access to basic personal hygiene products such as menstruation pads, diapers etc.



# High hygiene standards are most essential in the future ideal public washroom

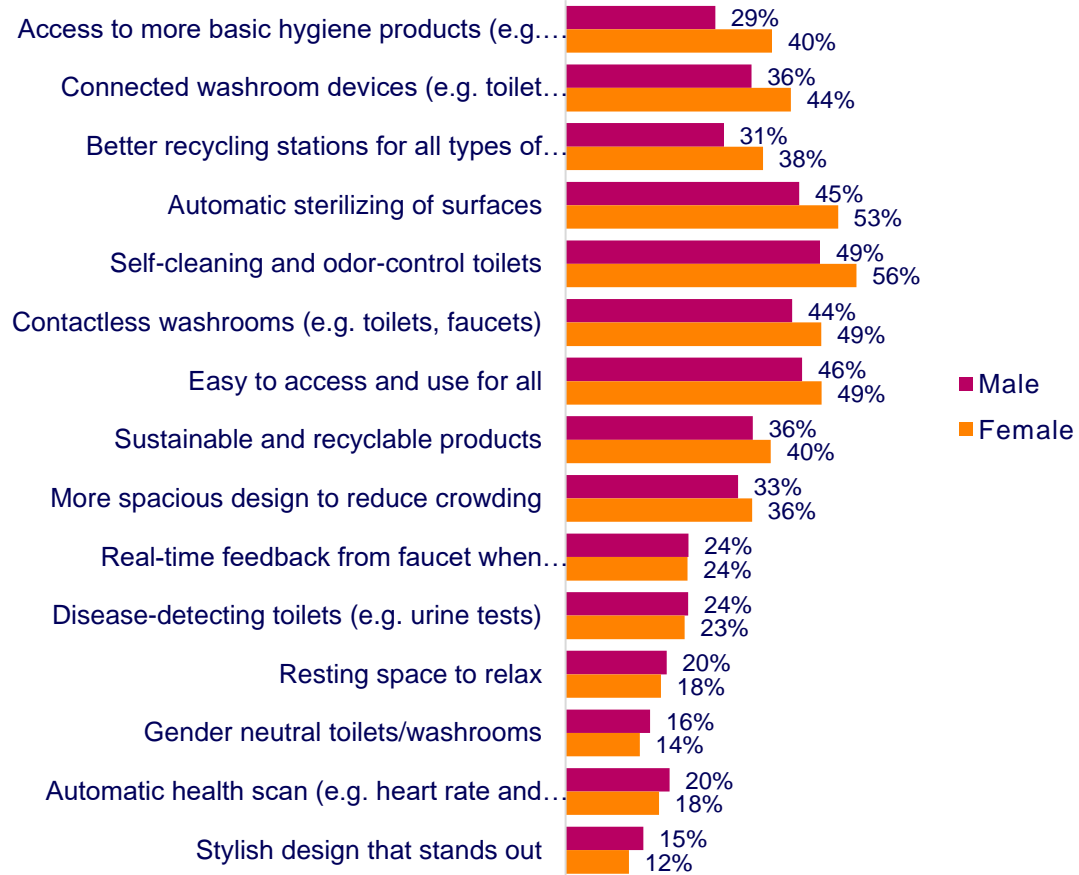
More than half think self-cleaning and odor-control toilets are essential for the ideal future public bathroom.



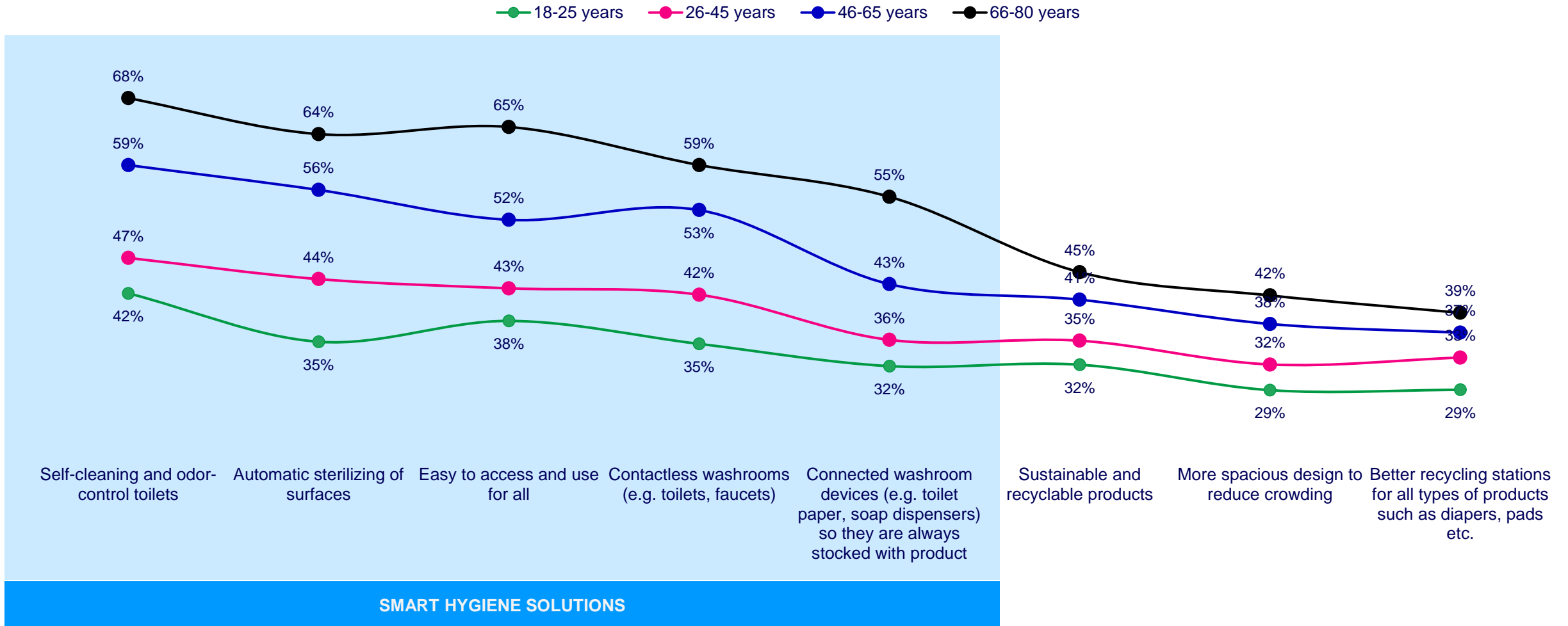


# Women have higher demands, overall, on the ideal future bathroom than men

Largest differences between men and women about access to more basic hygiene products, connected washroom devices and automatic sterilizing of surfaces.



# Hygiene standards and smart bathroom devices are higher on the agenda with increasing age



# Access to more basic hygiene products is most essential for people experiencing menstruation and menopause

Want more access to basic hygiene products in the ideal future washroom



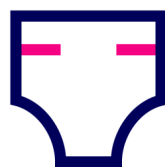
**46%**

who menstruate want access to more basic health and hygiene products



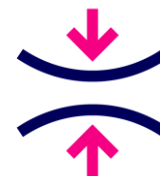
**41%**

going through menopause want access to more basic health and hygiene products



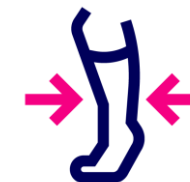
**39%**

experiencing urine leakage want access to more basic health and hygiene products



**35%**

experiencing tissue swelling want access to more basic health and hygiene products



**33%**

experiencing vein disorders want access to more basic health and hygiene products



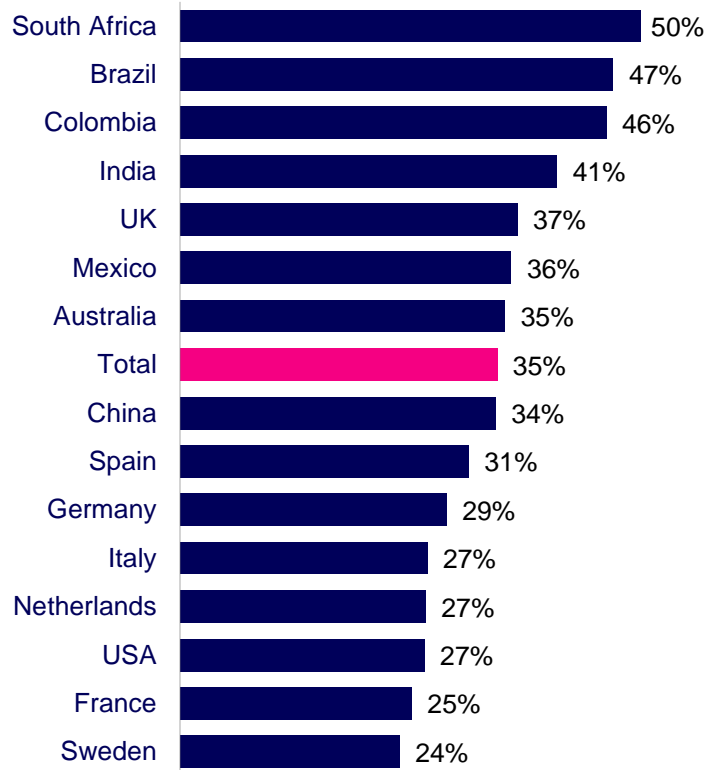
**32%**

experiencing chronic wounds want access to more basic health and hygiene products

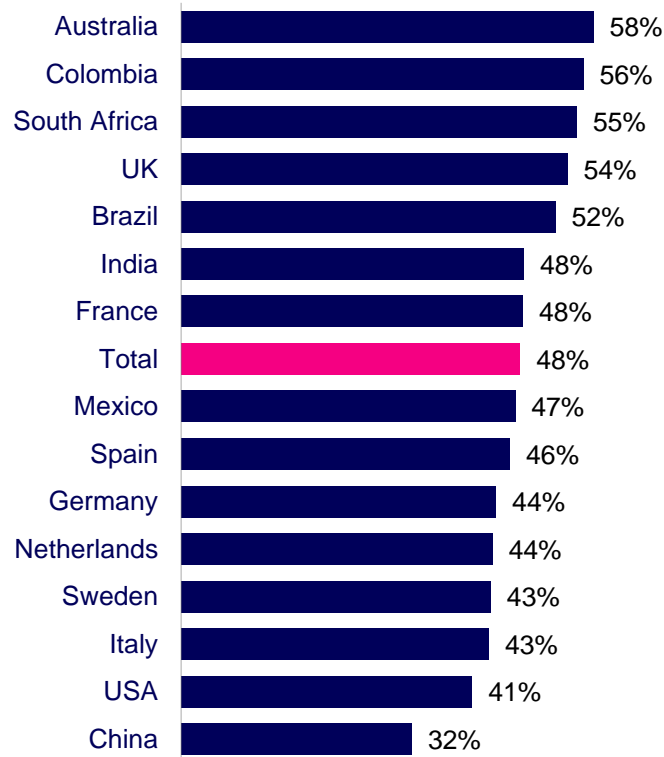
# Access to more basic hygiene products is highly essential in South Africa, and Brazil

Less essential in Sweden and France.

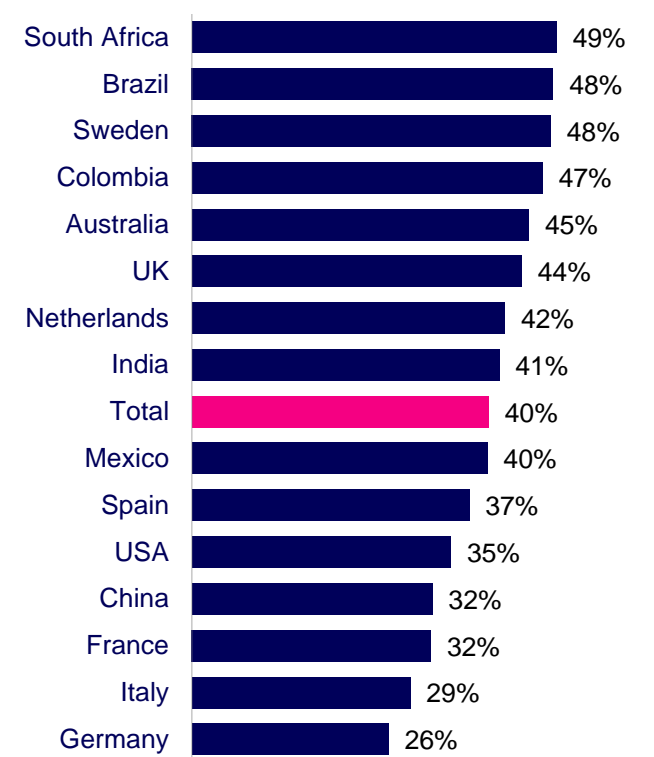
Access to more basic hygiene products (e.g. menstruation pads or diapers)



Easy to access and use for all



Connected washroom devices (e.g. toilet paper, soap dispensers) so they are always stocked with product



# REDESIGNING PUBLIC SPACES

## Key Highlights



**51%**

are more confident in ability of healthcare professionals to maintain a higher standard of hygiene as a result of COVID-19 pandemic.



**66%**

say access to basic personal hygiene products is essential to well being in public spaces of the future



**25%**

say they feel safe about hygiene standards in public bathrooms and 29% in local transport. Moreover, the eldest feel most unsafe about hygiene in public spaces – especially public toilets(13%) and public transport (19%).



**35%**

say access to more basic hygiene products is essential for the future of public washroom, especially to those experiencing menstruation (46%) or urine leakage (39%).

## Contextual Summary

**People are wary of hygiene standards in public spaces and crowds. The future public spaces must go beyond the basic needs and include all.**

The pandemic resulted in a surge in demand for toilet paper, contactless bathroom solutions and the abandonment of public spaces. In this new “Neo Hygiene” era, consumers have new demands from redesigning public spaces to ensure the health and safety of people. We know that we have different needs in our stages of life, how can we in the future accommodate for the needs in our public spaces?

While, the pandemic has favourably shifted attitudes towards experts it has also increased the scrutiny on hygiene standards in public places. People not only want public spaces to meet the most basic hygiene and product needs, but to also go above and beyond to ensure accessibility and high standards. Washrooms of the future will be expected to integrate technology to reduce contact and automate hygiene routines.

# Sustainable Consumption

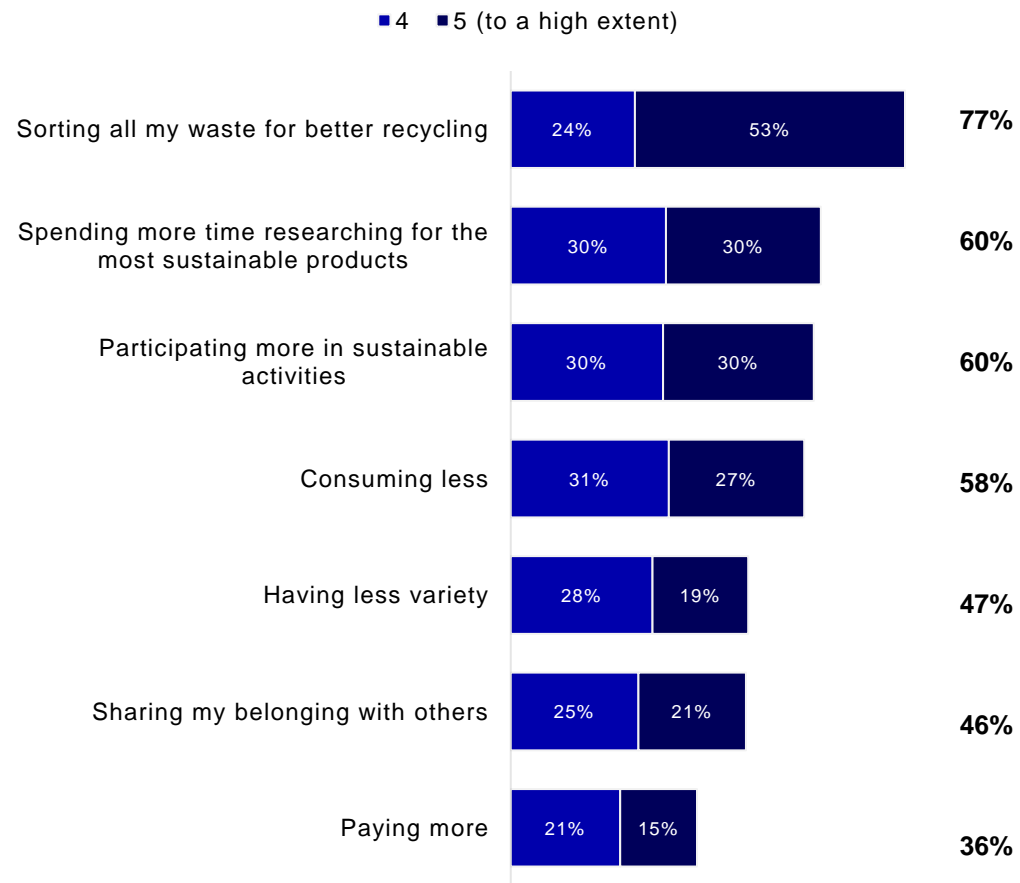
7



# 61%

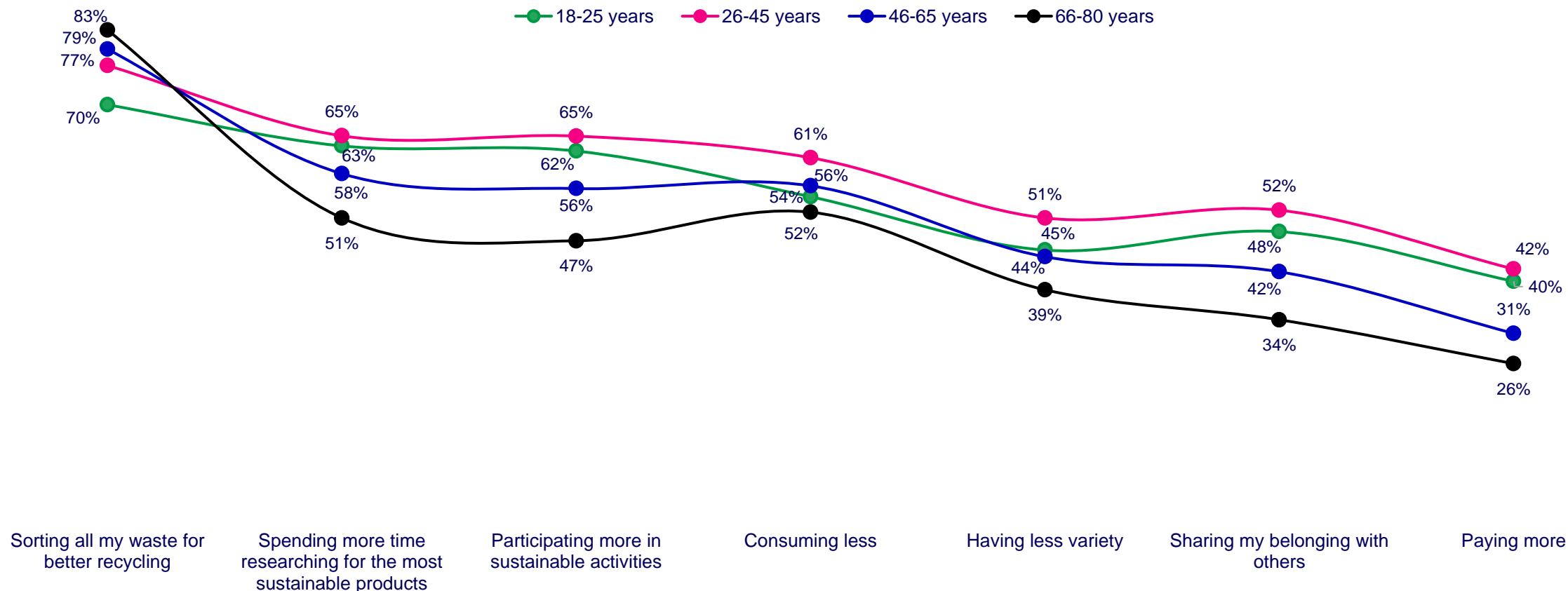
say they themselves are responsible  
for consuming sustainably

# Easier behaviors with less barriers such as ‘sorting waste for recycling’ or ‘spending more time researching’ are favored most





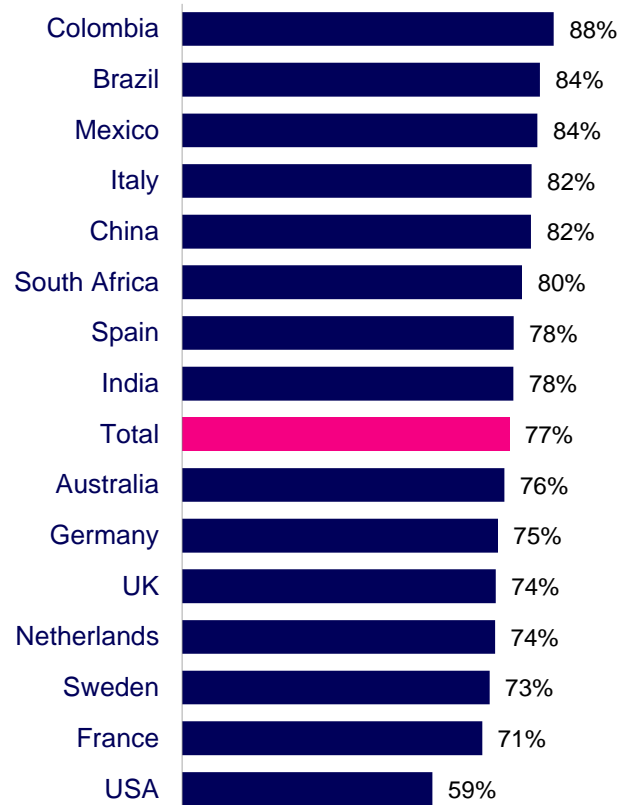
# Willingness to sort waste is higher by age, while willingness to pay more is lower for middle-age and seniors



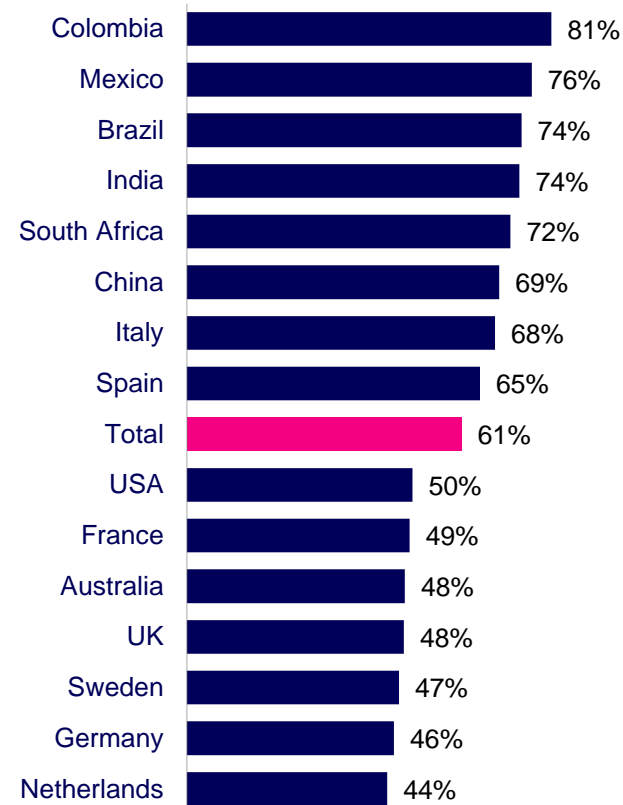
# Colombia, Brazil and Mexico are the most willing to sort waste and research more to consume sustainably

India and France are most willing to pay more.

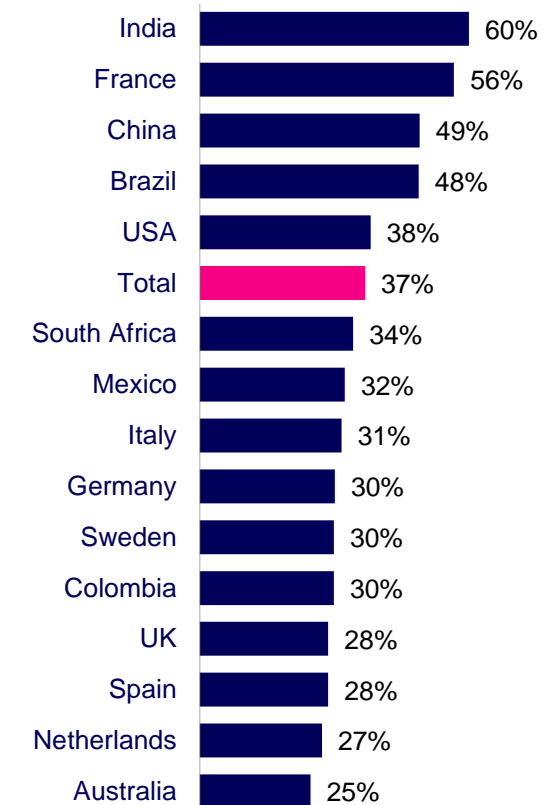
### Sorting all my waste for better recycling



### Spending more time researching for the most sustainable products

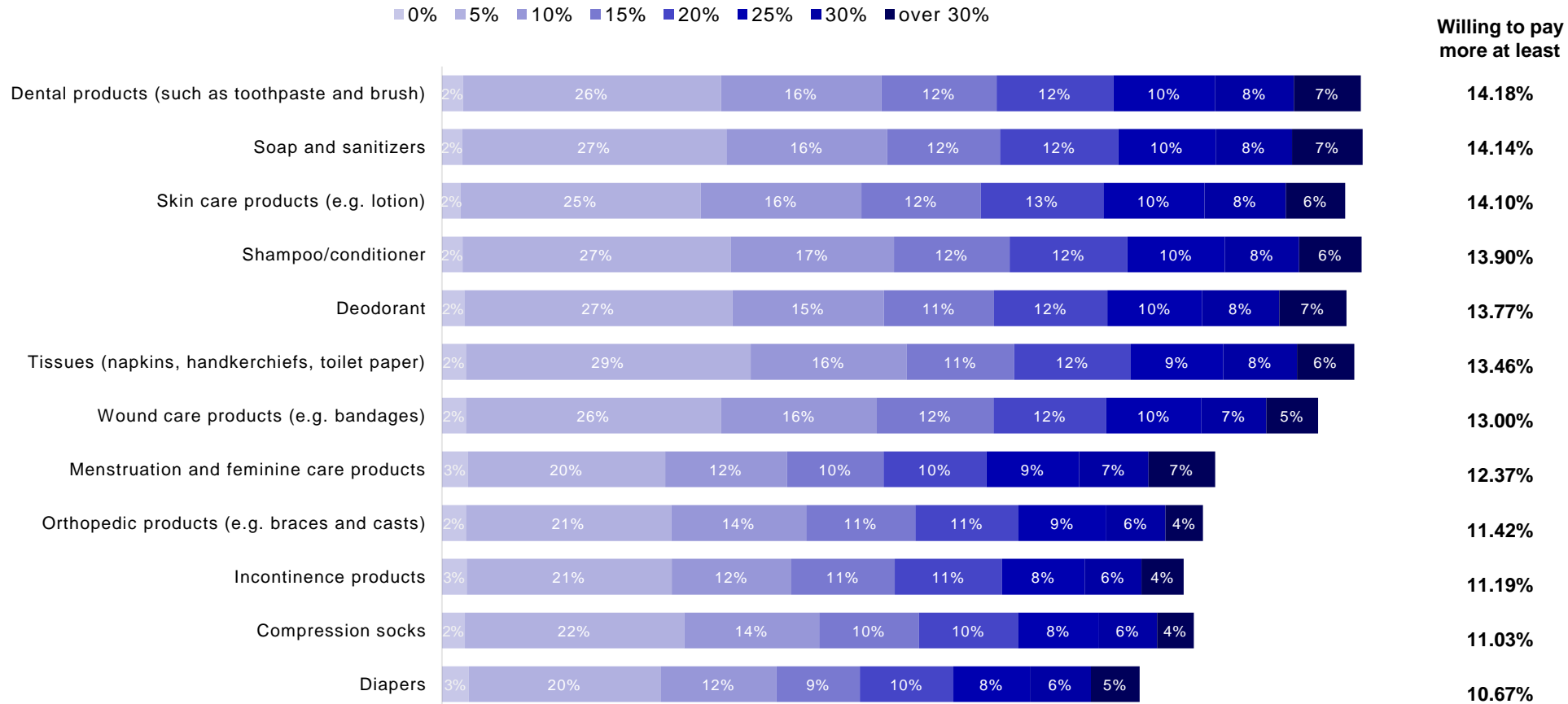


### Paying more



# Of those willing to pay more, the willingness-to-pay is highest for dental, skin and hair products

Highest price sensitivity is for diapers.



# Willingness to spend more on sustainable products



**+14.10%**

Skin care products



**+13.46%**

Tissues (napkins, toilet paper)



**+13.00%**

Wound care products



**+12.37%**

Feminine care & menstruations



**+11.42%**

Orthopaedic products



**+11.19%**

Incontinence products



**+11.03%**

Compression socks



**+10.67%**

Diapers



At least

**+12.77%\***

more is what people are willing to pay for sustainable hygiene and medical products

Filter: Those who said they are willing to pay more for living sustainably

Green Recovery Survey 2021

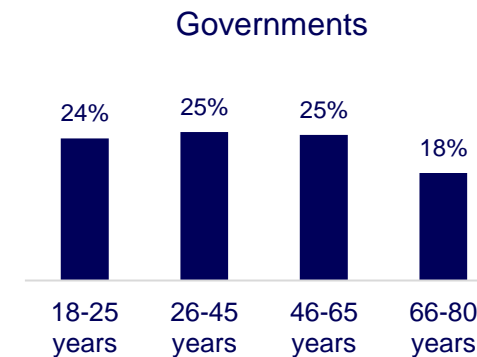
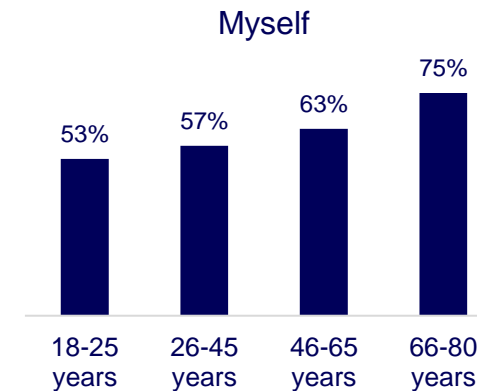
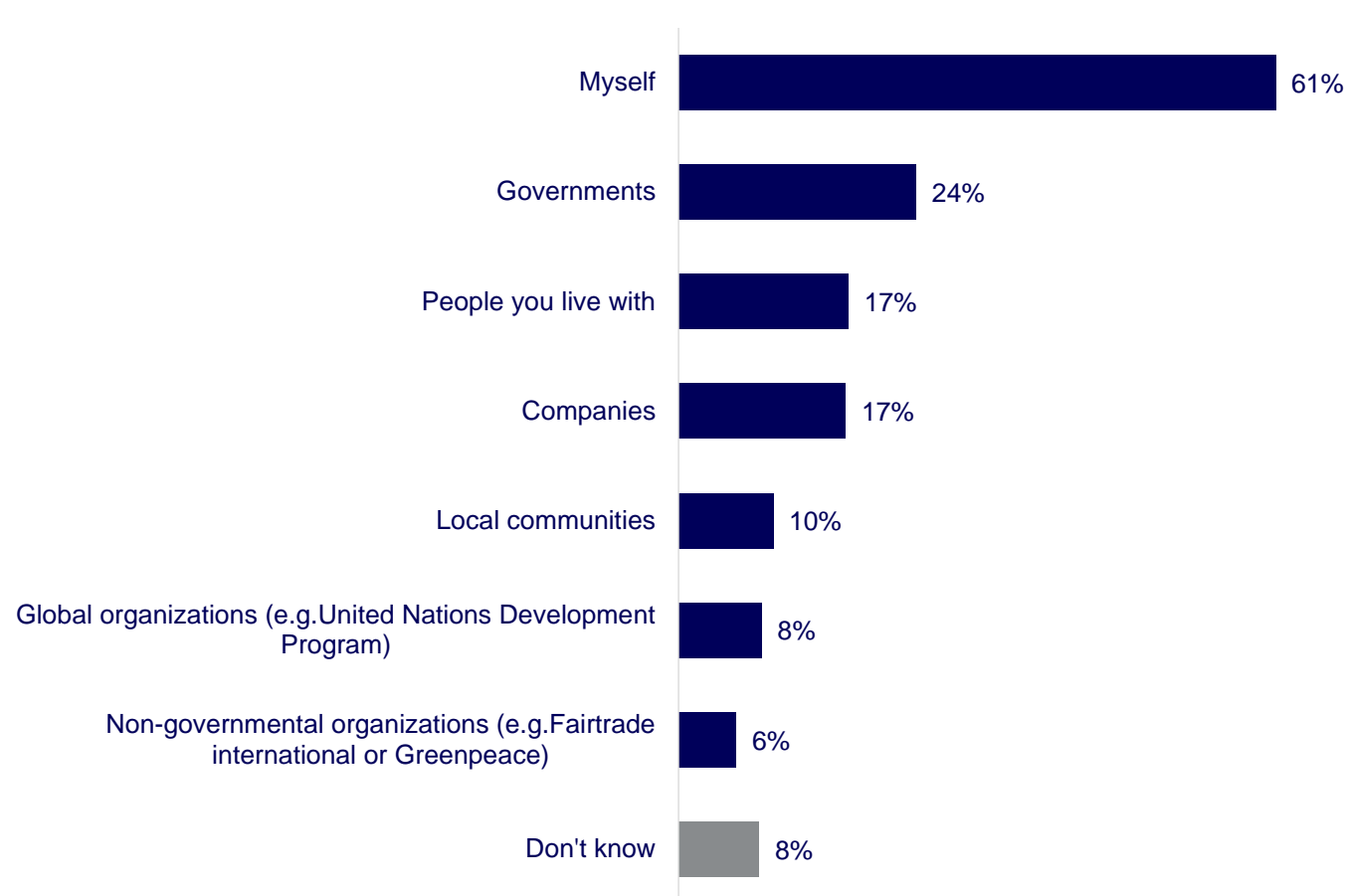
**+15%**

in average would people spend on hygiene and health products if they were made more sustainable



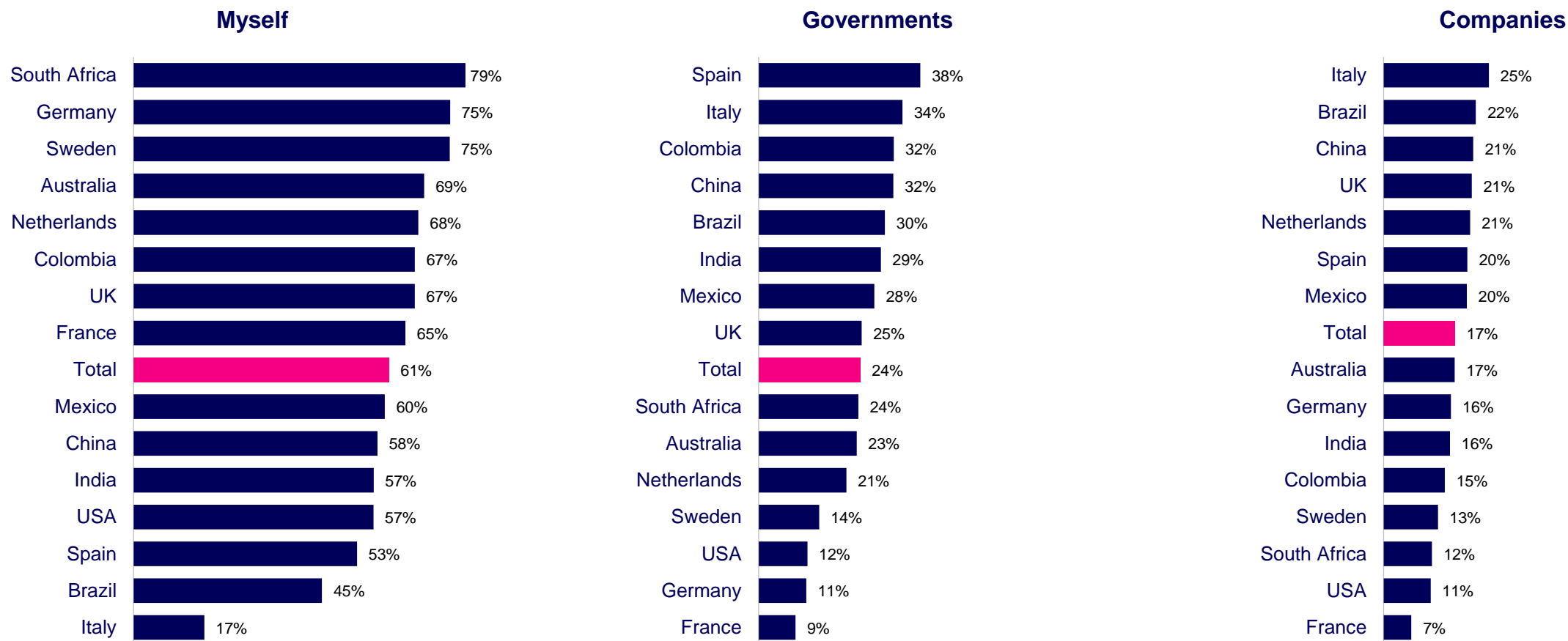
# People, especially seniors, hold themselves responsible to ensure that they consume sustainably

Younger people are more likely than seniors to place the responsibility on the governments.



# More responsibility is located with self for sustainable consumption in South Africa, Germany and Sweden

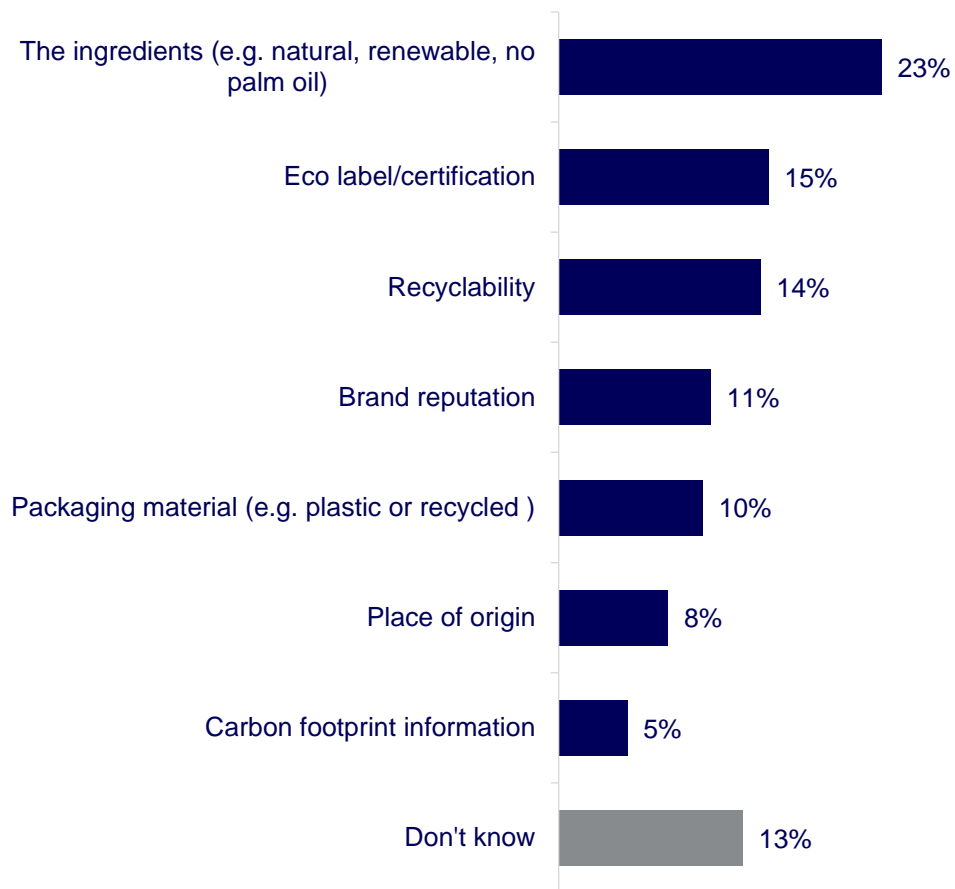
Less in Italy where government and companies are held more responsible for sustainable consumption



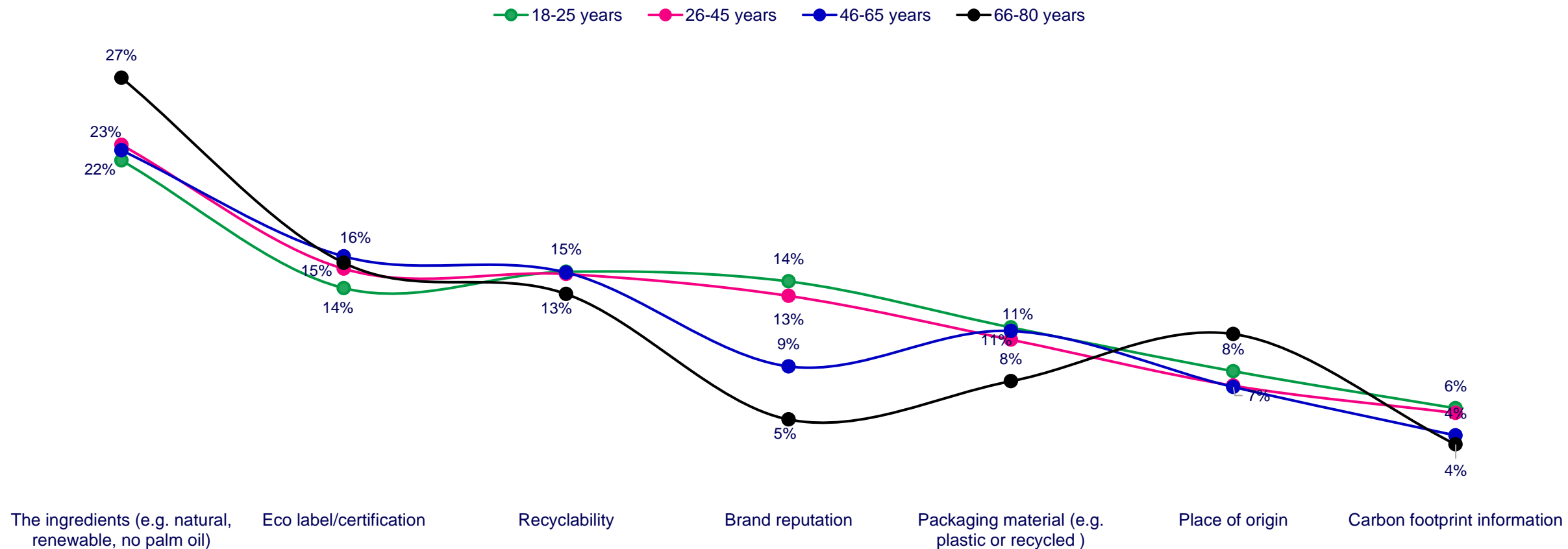


# People rely most on the ingredients to make sustainable purchase decisions, followed by eco-labels/certifications

Carbon footprint information is the least relied upon.

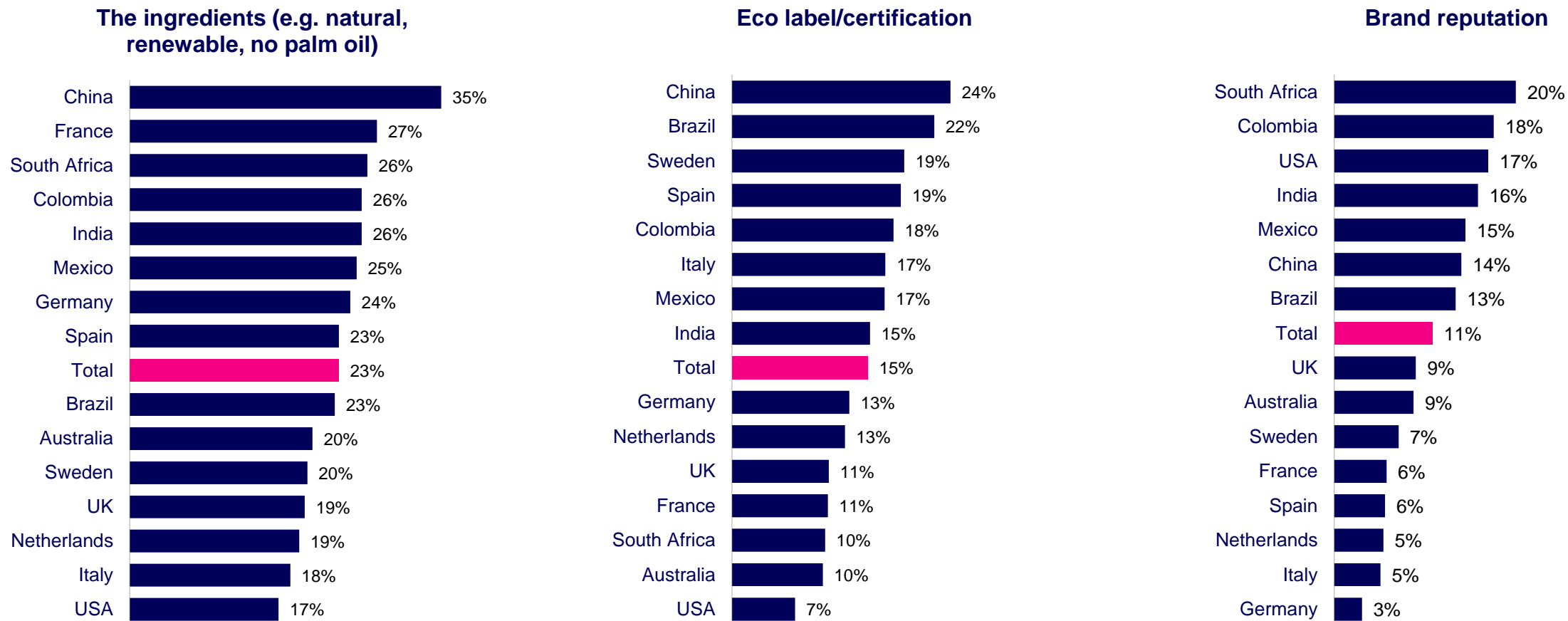


# The elderly rely most on ingredients, while brand reputation is most relied on by younger people



# All countries are more reliant on ingredients than eco labels/certifications

Brand reputation is most chosen by South Africa, Colombia and USA.





# SUSTAINABLE CONSUMPTION

## Key Highlights



**61%**

say they themselves are responsible for ensuring they consume sustainably – especially people over 65 years (75%).



**36%**

are willing-to-pay more to live sustainably. But willingness to pay more decreases with age.



**5%**

say they rely on carbon footprint information when looking for a sustainable alternative for a product. Most rely on ingredients (23%) followed by eco labels/certification (15%)

**+12.77%**

more at least is what people (who are willing-to-pay more) would pay for more sustainable hygiene and medical products.

## Contextual Summary

**People are willing to adopt more sustainable behaviours but barriers such as cost, effort and access must be lowered.**

We know that there is a desire amongst consumers for health and hygiene products that are good for you, the environment and society. However, making a sustainable choice is not as easy as it might seem. Consumers are claiming to be more environmentally friendly than before. But what are we actually prepared to give up and who is responsible for our sustainable behaviour?

It appears that barriers such as added effort and access must be removed to help consumers make sustainable choices. People are willing to adopt more responsible behaviours as it is visible with the uptick in recycling and more than 1 in 3 are willing to pay more. Finding reliable information to make better purchasing decisions can be a daunting task for consumers, as well as an opportunity for businesses to help them.

