

The Essentials Initiative Survey 2020-2021



The Essentials Survey

Background

Every day, millions of women, men and children refrain from going to work or school or from taking part in social events because of hygiene and health-related concerns. The concerns or obstacles could be due to the lack of clean toilets or access to hygiene products, but also due to cultural taboos and stigmas. For many people, this results in exclusion from society and for society this leads to a loss of economic value or increased costs. This means there is both a human and a business perspective to investing in hygiene and health and spreading knowledge about it.

As a response to the ongoing world health crisis, the 2020-2021 edition of the survey also includes an additional chapter focusing specifically on COVID-19, examining changes in hygiene and health related consumer attitudes and behaviors brought on by the pandemic.

Through the Essentials Initiative, Essity is conducting a global dialogue to increase awareness of the importance of hygiene and health and its link to well-being. This survey is part of that project.



Table of contents

Part 1: COVID-19 Survey

1. Handwashing habits
2. Hygiene in public spaces
3. Consumption
4. Public policy and experts

Part 2: Hygiene and Health Survey

5. General Health Stigmas
6. Incontinence
7. Menstruation
8. Generations
9. Public Hygiene
10. Public Health Threats
11. Sustainability

Background data for part 1 & 2

Survey methodology



The surveys have 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 is digital questionnaires.



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

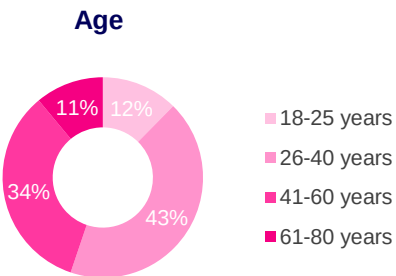
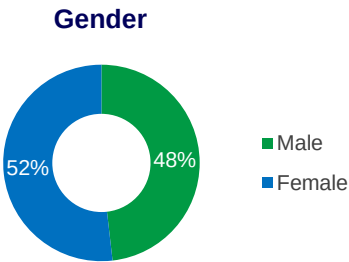


Part 1: COVID-19 Survey

Data collection: 9-19th July 2020

Respondents per market (10 markets)

France	1075
Germany	1044
Italy	1049
Mexico	1018
Netherlands	1018
Russia	1043
Spain	1047
Sweden	1009
UK	1035
USA	1031
Total	10 369

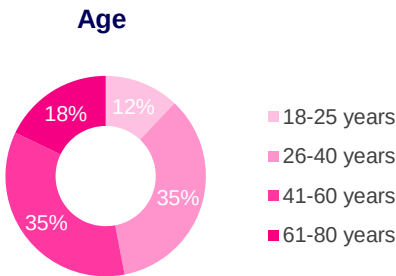
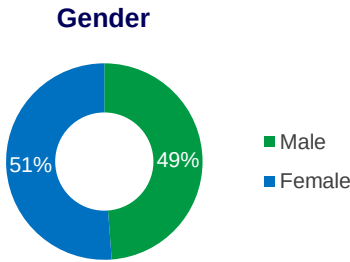


Part 2: Hygiene and Health Survey

Data collection: December 2019 - January 2020

Respondents per market (15 markets)

Australia	1014
Brazil	1040
China	1067
France	1056
Germany	1009
India	1000
Italy	1030
Mexico	1021
The Netherlands	1011
Russia	1026
South Africa	1017
Spain	1059
Sweden	1014
United Kingdom	1025
USA	1019
Total	15 408



Key Takeaways

2020-2021

Executive summary

COVID-19

3 in 10 say we need to raise global hygiene standards to prevent new pandemics.

68% have changed the way they wash their hands due to the spread of COVID-19.

1 in 2 say their view of what products are essential in daily life has changed since the spread of COVID-19.

7 in 10 say the virus would spread less quickly if people were better at washing their hands.

72% say they trust their gut in relation to recommendations on hand hygiene, the same percentage who say they trust the advice of experts.

Hygiene & Health

33% feel uncomfortable discussing urinary incontinence with other people, making it the #1 stigma in this survey.

24% think the hygiene product category needs to address its plastic use.

42% of women have refrained from going to work/school last year because of matters connected to menstruation.

87% have refrained from using a public toilet, 43% because the toilet lacked toilet paper or soap.

57% worry that lack of proper hygiene habits at healthcare facilities might expose them to antimicrobial resistant bacteria.

COVID-19

The ongoing pandemic is causing massive shifts in society, not least when it comes to consumers' attitudes and behaviors related to hygiene and health.

As a response to the global health crisis, this edition of the Essentials Survey includes results from an additional survey conducted in July 2020, focusing on hygiene and health during the pandemic. The survey asked more than 10 000 consumers across 10 countries about their attitudes and behaviors within the areas of handwashing habits, hygiene in public spaces, consumption as well as public policy and experts.

The results show that the pandemic has affected daily life in both negative and positive ways. In general, people have become more aware of issues regarding hygiene and health in society. However, many still lack the hygiene habits needed to reduce the effect of the pandemic, and there is much work needed before society can settle into a new normal.

Highlights

6 in 10 would feel safer visiting crowded public spaces if they provided more hand hygiene stations/alternatives.

8 in 10 think they wash their hands a sufficient number of times per day.

6 in 10 do not shake hands with others anymore.

77% wash their hands to protect themselves.

Incontinence

Incontinence, sometimes described as a silent illness, keeps people from participating at work and in everyday social life. Many of these days are lost due to embarrassment.

Number of work/school days lost per year because of incontinence:

Germany	2 million
United Kingdom	2 million
Russia	19 million
Sweden	290 thousand

Calculation:

Share of respondents who have refrained from going to work/school at least one day last year because of issues with incontinence

x
population of country
=

low estimate of number of work/school days lost

Highlights

60% of respondents have never experienced someone telling them about their incontinence.

38% of people suffering from incontinence have refrained from using public transport.

1 in 3 in Russia and Germany find it socially unacceptable to talk about incontinence.

54% believe that those who suffer from incontinence are reluctant to seek help due to embarrassment.

Menstruation

Women around the globe still lack access to sanitary products and proper hygiene facilities. With increased urgency, people look for governments to take action.

Number of work/school days lost last year because of women not being able to afford sanitary products:

Australia	645 thousand
France	1,7 million
Mexico	6,1 million
United States	15 million

Calculation:

Share of all female respondents who have refrained from going to work/school at least one day last year because they could not afford feminine hygiene products

x

female population of country

=

low estimate of number of work/school days lost

Highlights

42% of women have missed school or work days in the past year due to menstruation.

42% believe that governments should offer free fem-care products to students and the poor.

1 in 3 that missed school or work days due to menstruation in the last year did so because of social stigma.

37% think that the government should remove taxes on menstrual products.

Generations

Discrimination because of age is not only an issue for the older population – it affects people from all generations.

Going through different life stages and growing older affects people in both positive and negative ways. The results of the survey point toward women experiencing these issues more negatively than men.

Highlights

54% have experienced discrimination due to their age.

15% have felt excluded from social activities due to their age.

20% have experienced discrimination in a hiring process because of their age.

Public Hygiene

Despite progress made in the last decades, many people still lack access to sufficient hygiene facilities and basic knowledge about hand hygiene.

If people washed their hands according to guidelines, they should wash more than 10 times per day. According to this year's survey, men wash their hands on average 7,2 times per day (2018: 7,3) and women 9,3 (2018: 9,6).

According to the CDC (Centers for Disease Control and Prevention):

- 1 million deaths a year could be prevented if everyone routinely washed their hands
- Handwashing can reduce the risk of communicable diseases by up to 59%

Highlights

86% of respondents have refrained from using a public toilet in the last year.

67% have refrained from using a public toilet because it was **unclean**.

7 number of times a **man** washes his hands per day.

9 number of times a **woman** washes her hands per day.

Public Health Threats

With the current pandemic scare, it is worrying that a majority are afraid of being exposed to multi-resistant bacteria in healthcare facilities.

The survey results show a general distrust of hospitals' hygiene practices and ability to cope with multi-resistant bacteria.

Highlights

57% are worried that a lack of proper hygiene practices in hospitals might expose them to multi-resistant bacteria.

China, Mexico and India are the countries where people are most worried about antimicrobial resistance.

73% agree that antimicrobial resistance is a threat to public health.

47% are worried or very worried about antimicrobial resistance.

Sustainability

Increased trust and transparency in the recycling process is key to increase recycling of hygiene products in society.

Respondents say they would consider recycling hygiene products more if they knew for sure that the products would be recycled and if they received consistent information about what and how to recycle.

However, consumer demand on health and hygiene product categories to act sustainably and reduce plastic use has not yet reached the same levels as other categories, such as groceries or fast-food.

Highlights

1 in 3 say they would recycle hygiene products more if they knew for sure the products would actually be recycled.

24% think that the **hygiene** product category needs to address its plastic use.

46% consider the product's effect on the environment when they purchase hygiene products.

16% think that the **health** product category needs to address its plastic use.

PART 1:

Implications of COVID-19



Part 1: COVID-19



For 2020, answers from a total of **10 369** respondents have been collected from **10 markets**.



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



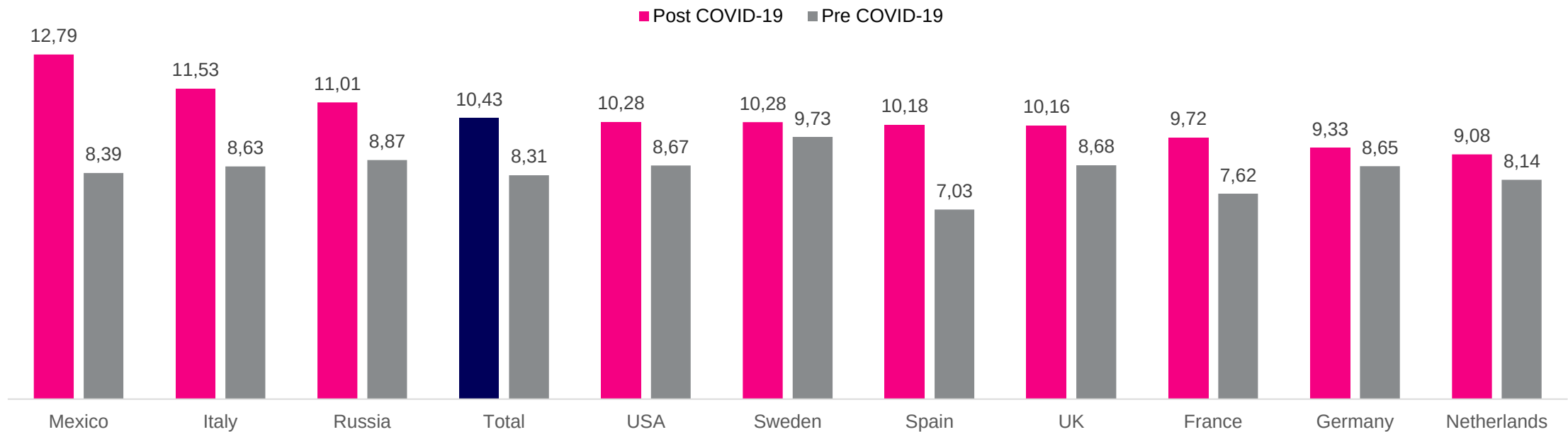
Data collection took place between **9-19th July 2020** through web panels in the respective countries.

Respondents per market

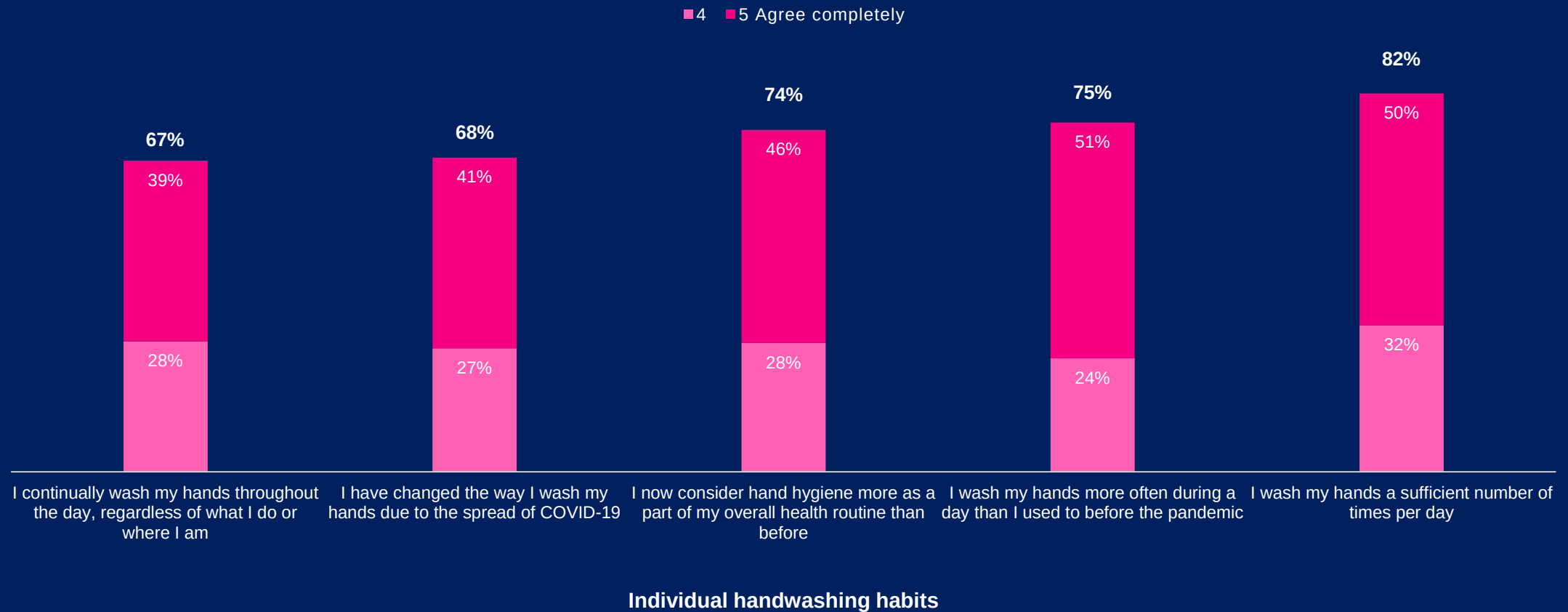
France	1075
Germany	1044
Italy	1049
Mexico	1018
Netherlands	1018
Russia	1043
Spain	1047
Sweden	1009
UK	1035
USA	1031

Handwashing habits

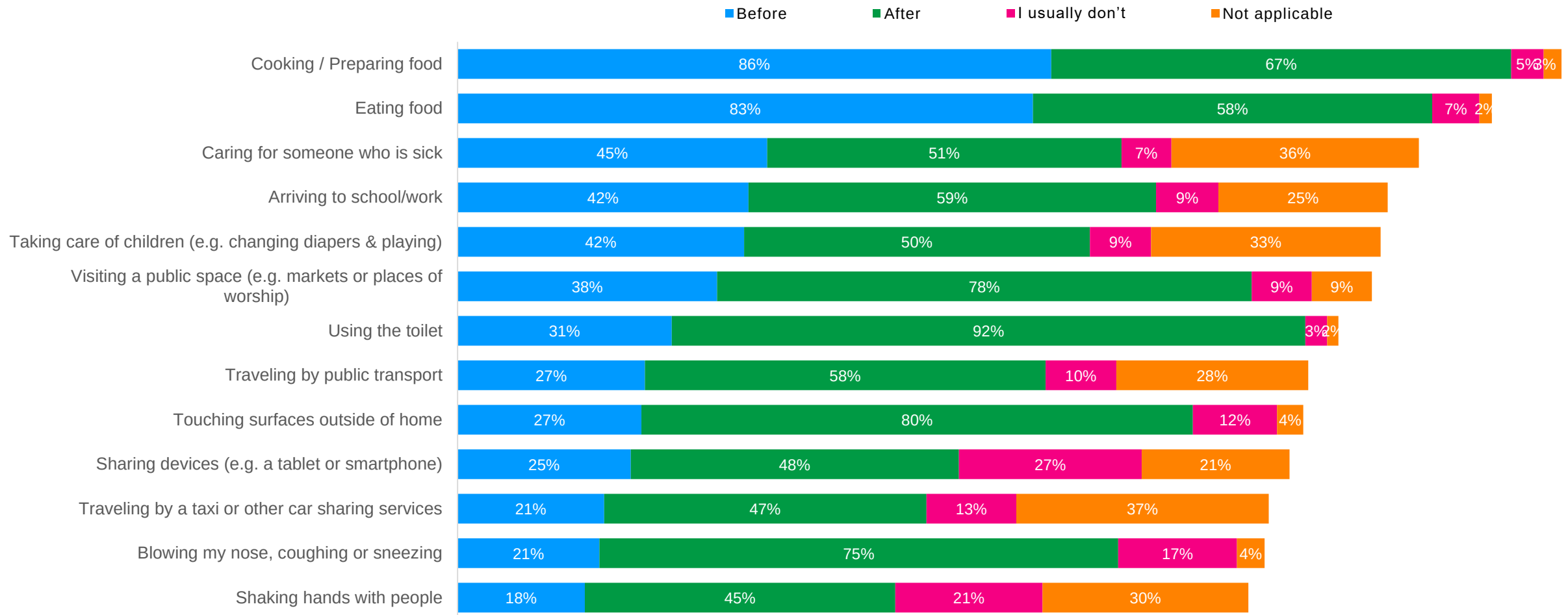
Large increase in handwashing since the COVID-19 pandemic



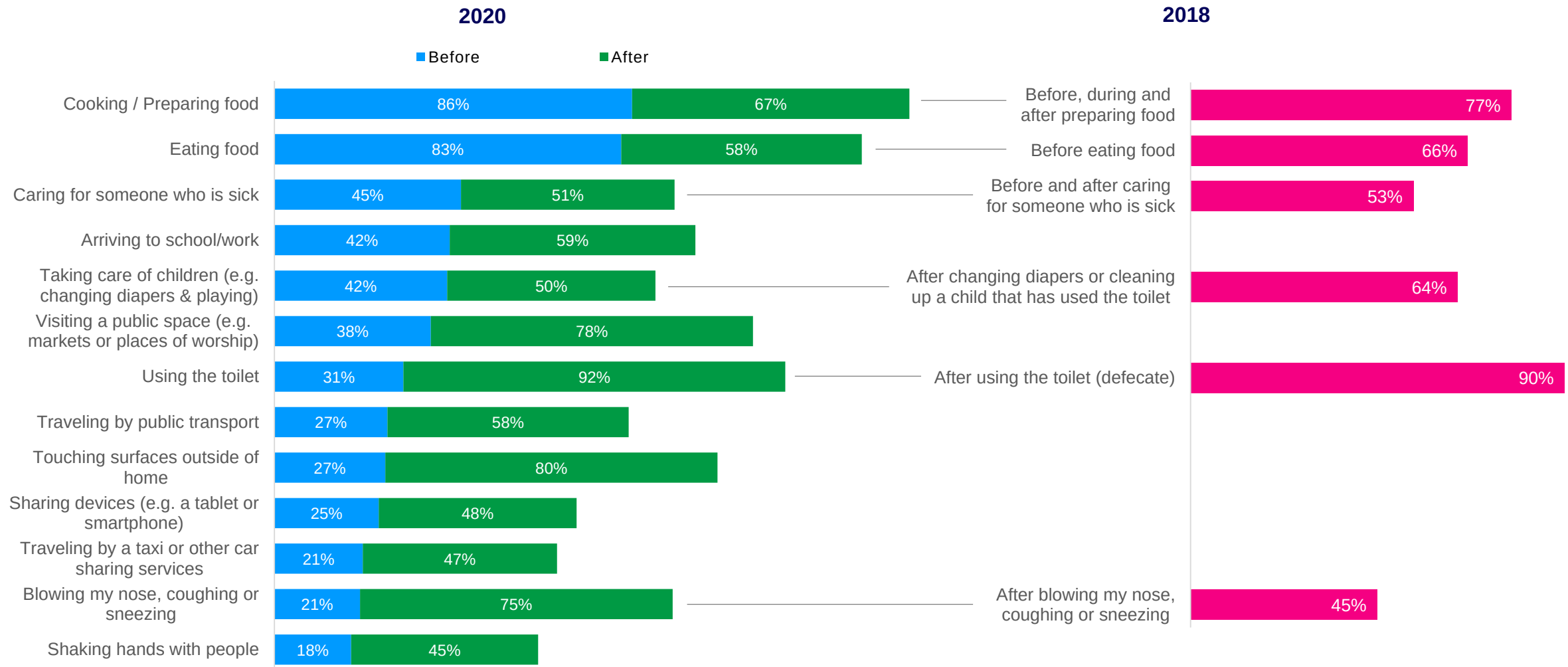
8 in 10 think they wash their hands a sufficient number of times per day



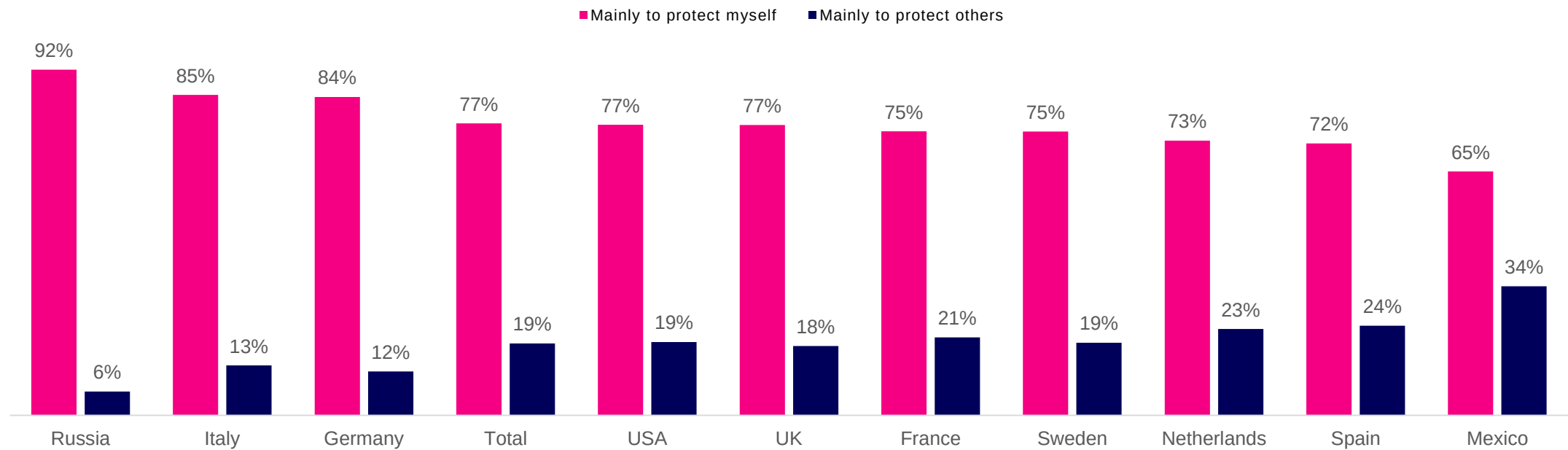
Many still lack the habit of washing hands in important contexts



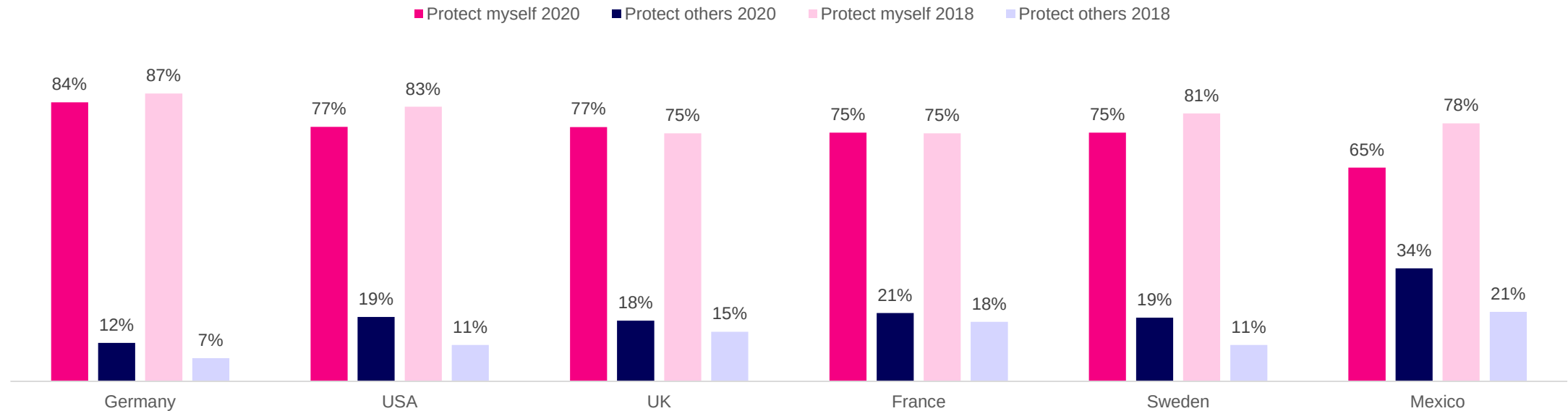
But this has long been a problem...



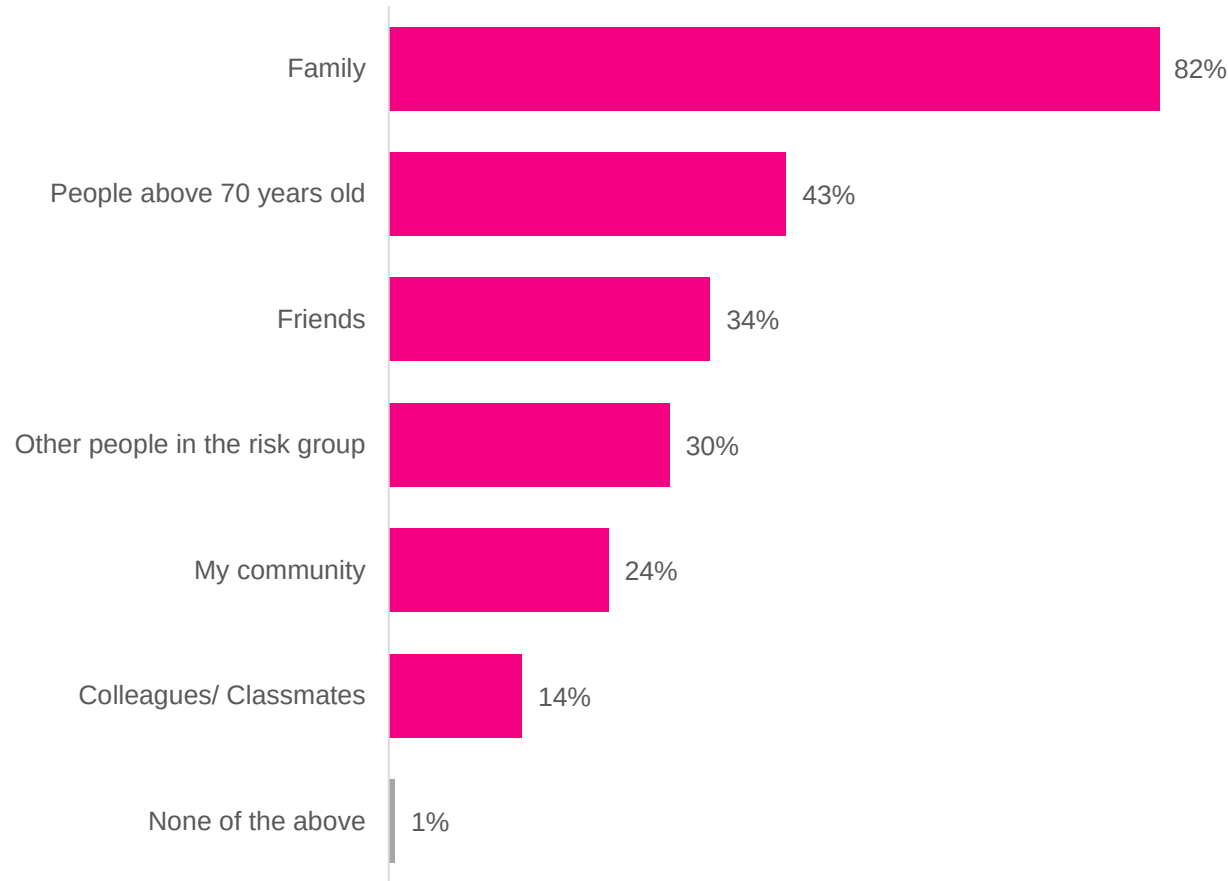
Most people wash their hands to protect themselves



More people wash their hands to protect others now than in 2018

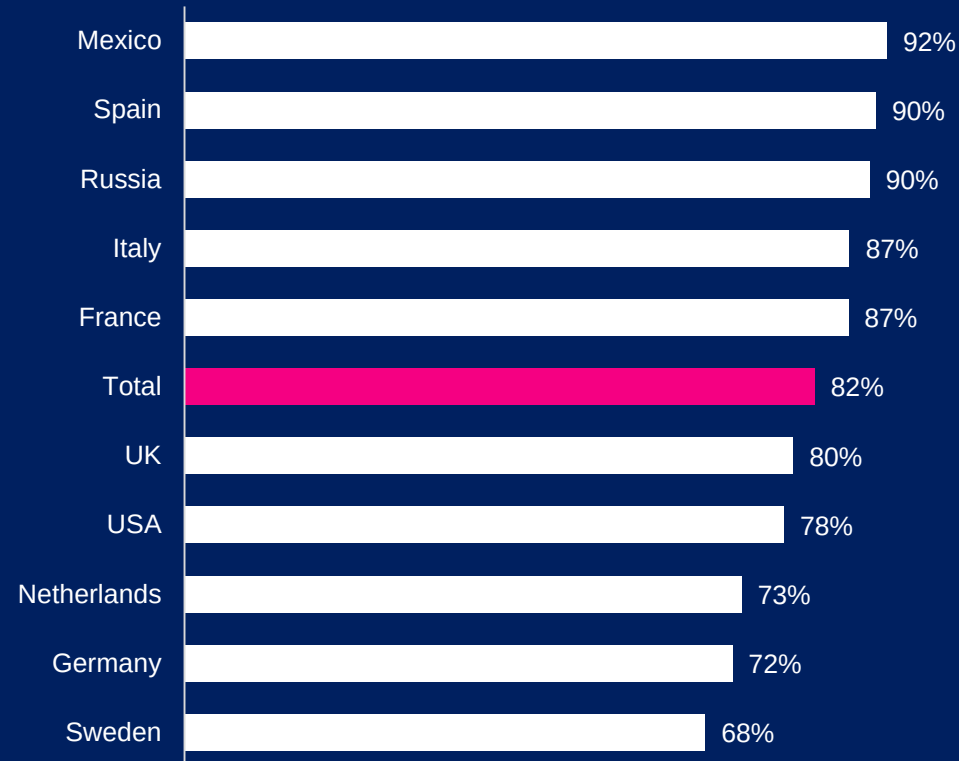


Those who wash their hands to protect others do it mainly to protect their own family

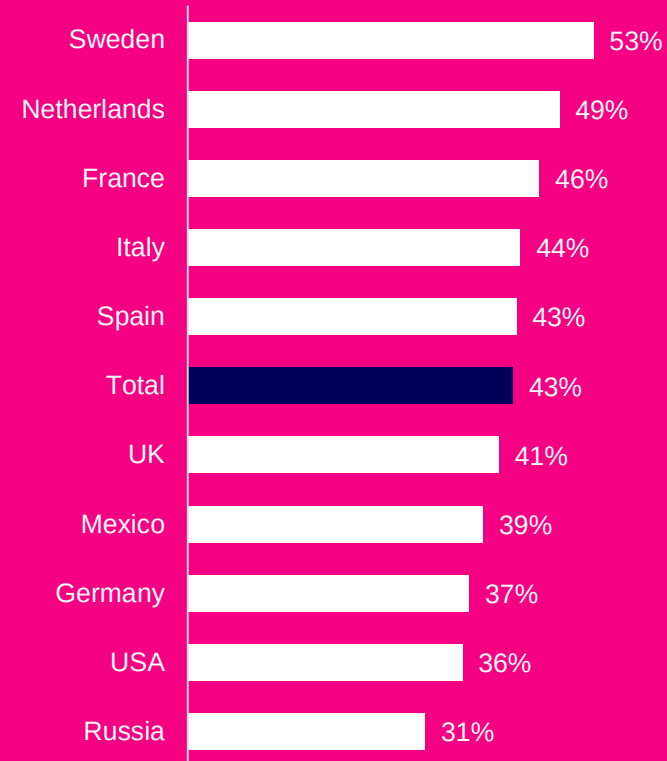


Sweden tops the list of those who wash their hands to protect people above 70 years old

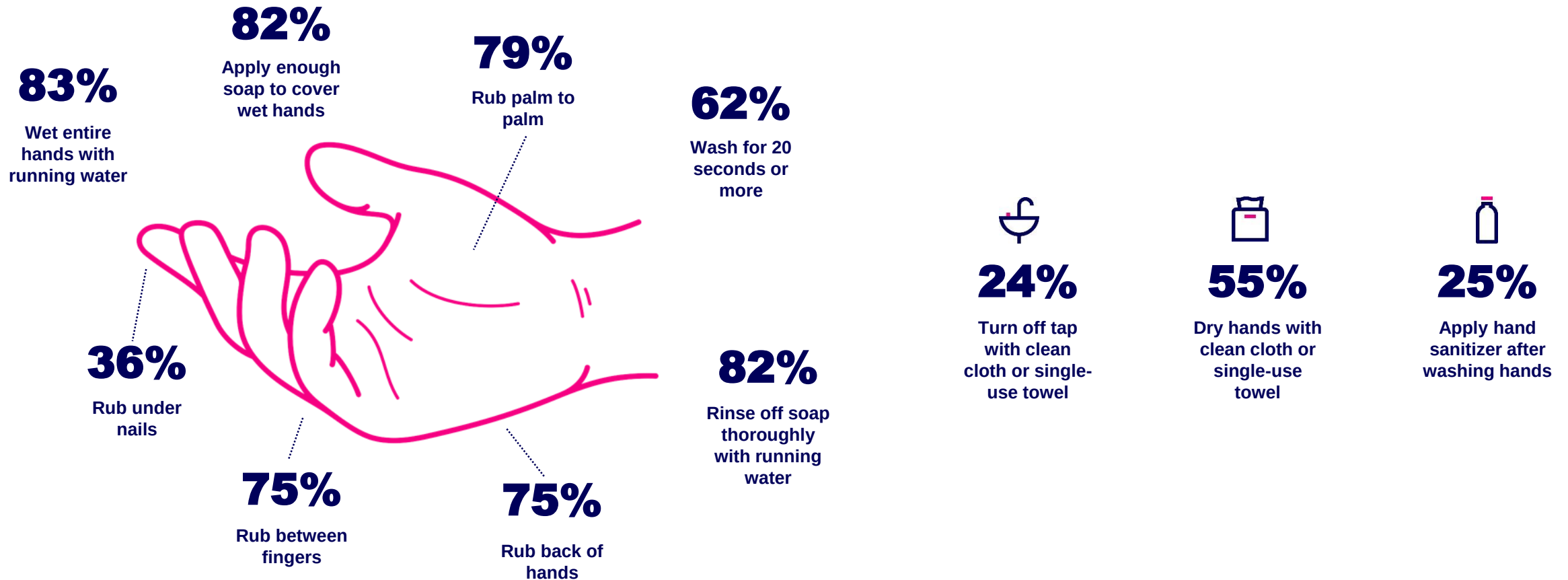
My family



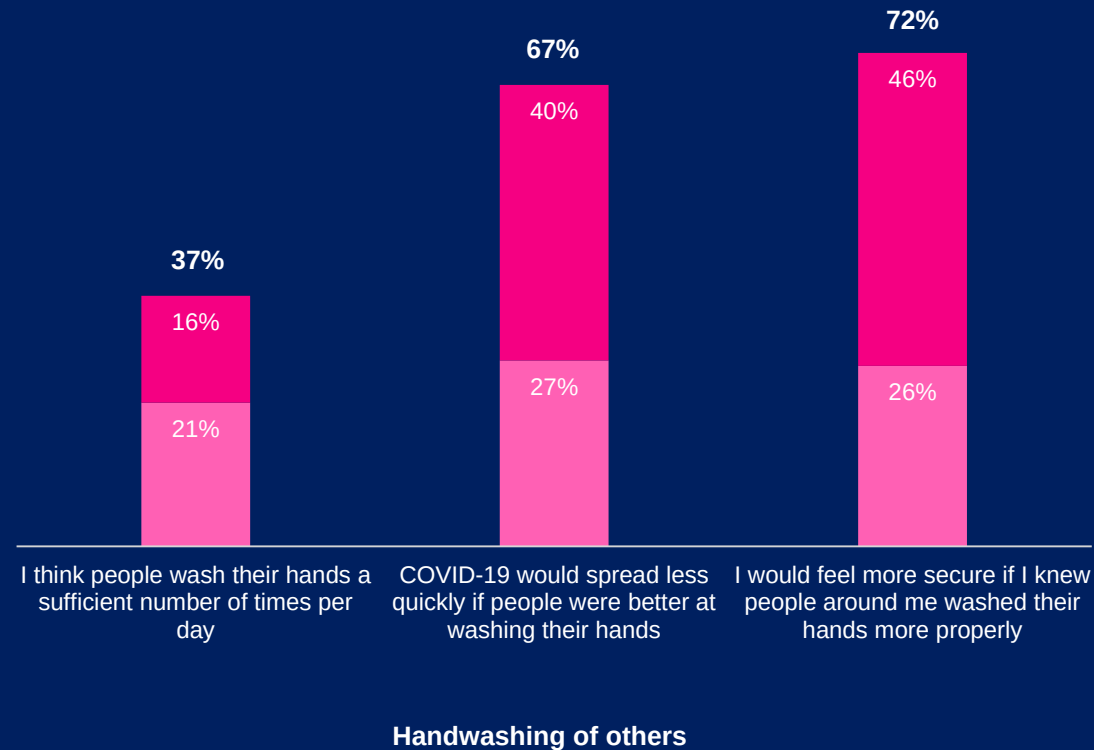
People above 70 years old



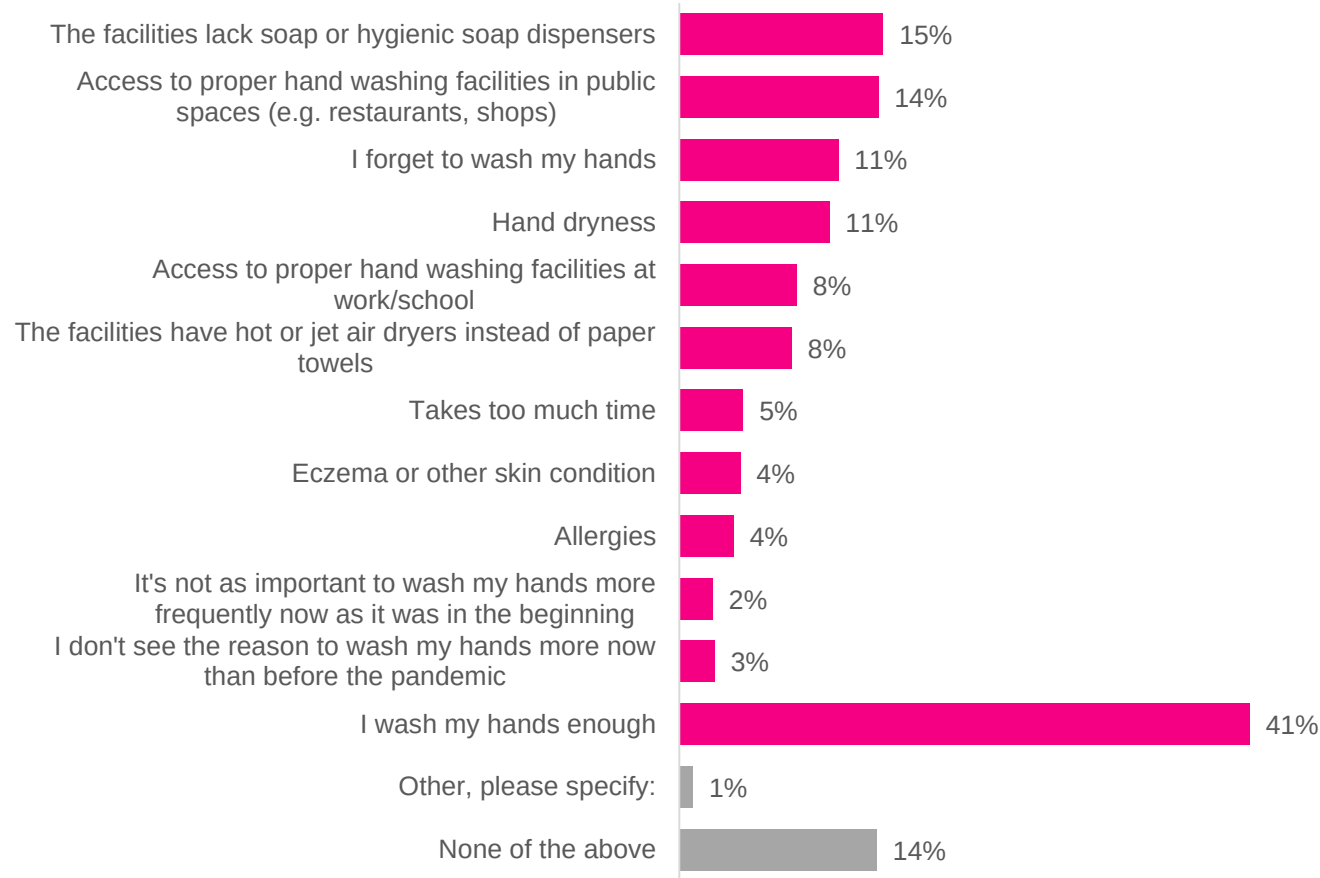
But how people wash their hands differs a lot...



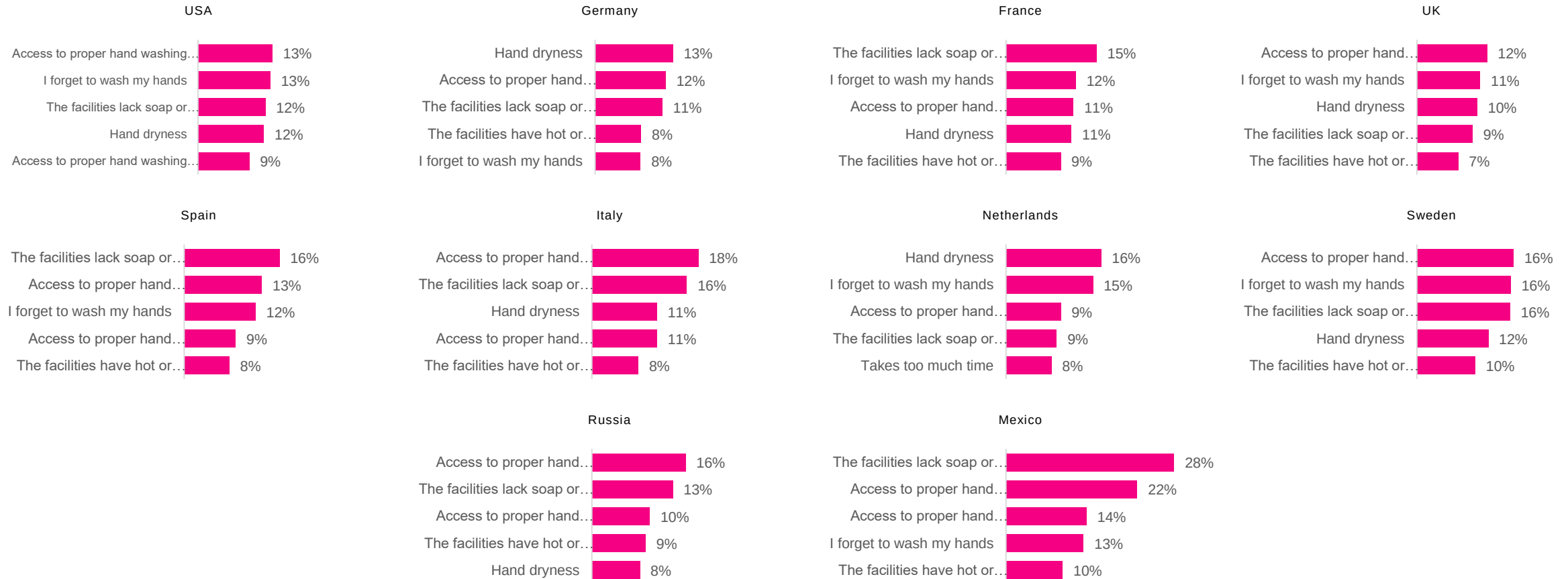
7 in 10 say the virus would spread less quickly if people were better at washing their hands



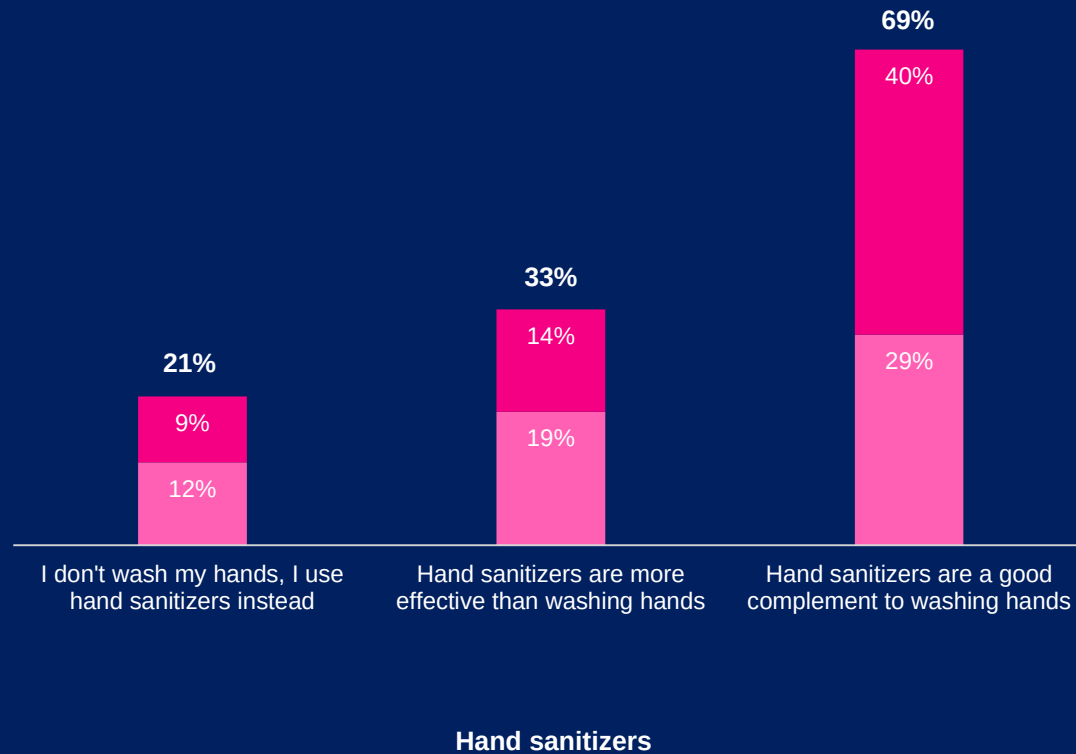
The main reason for not washing your hands more often is still a lack of facilities or hygiene products



While in some countries, hand dryness and forgetting to wash their hands are the main reasons



1 in 3 say hand sanitizers are more effective than washing hands



Hand sanitizers are more effective than washing hands

29%



37%

Summary - Handwashing habits

10 times a day is the average amount of times people wash their hand in a normal day, which is an increase from before the pandemic

8 in 10 think they wash their hands a sufficient number of times per day

68% have changed they way they wash their hands due to the spread of COVID-19

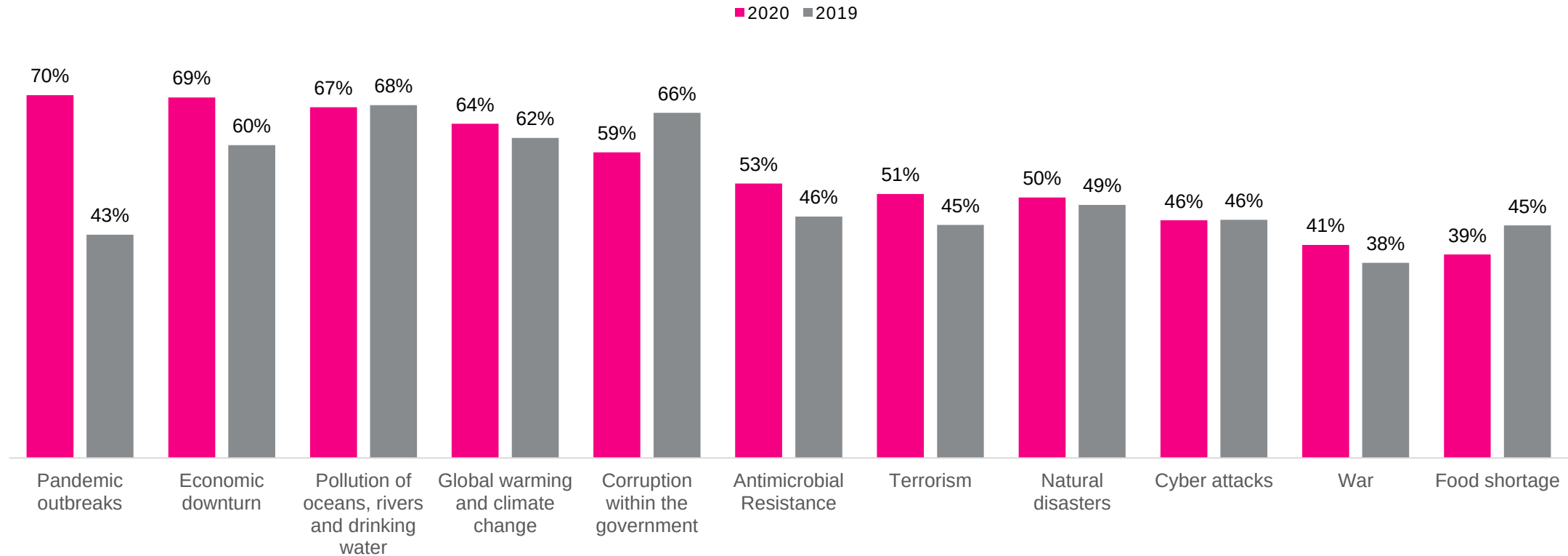
77% wash their hands to protect themselves

7 in 10 say the virus would spread less quickly if people were better at washing their hands

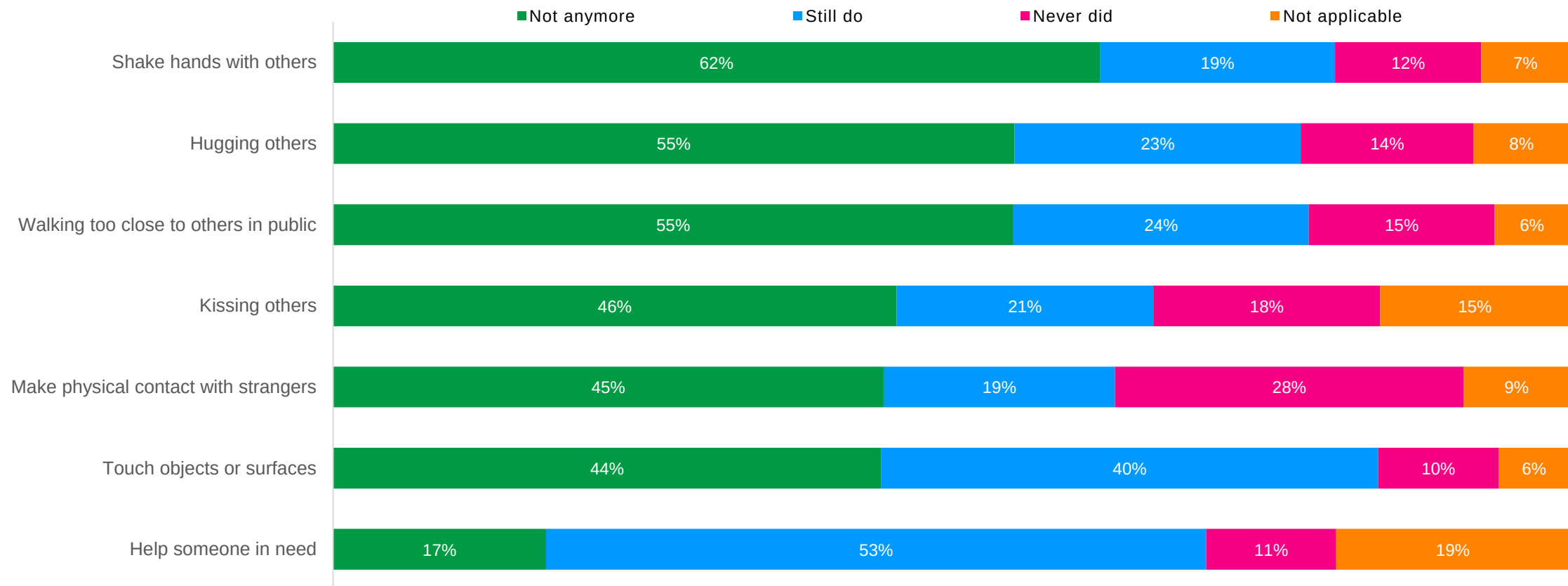
1 in 3 say hand sanitizers are more effective than washing hands

Hygiene in public spaces

Pandemic outbreaks are now the top public health concern



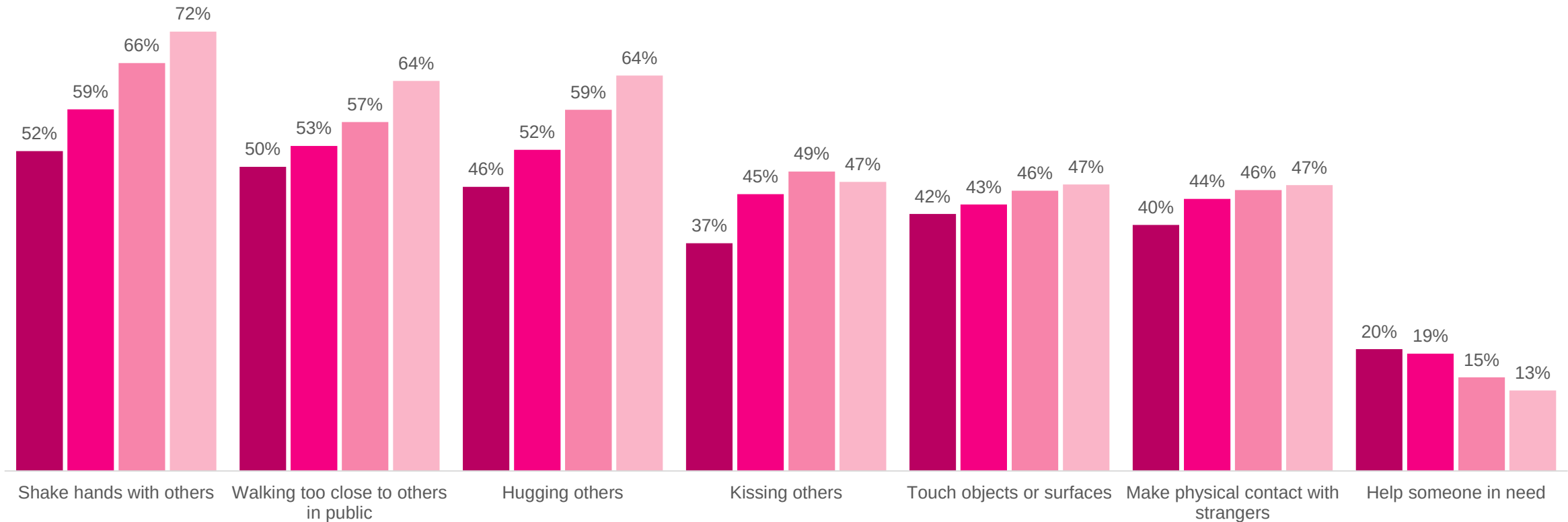
6 in 10 do not shake hands with others anymore



Older people have changed their behavior more as a result of COVID-19

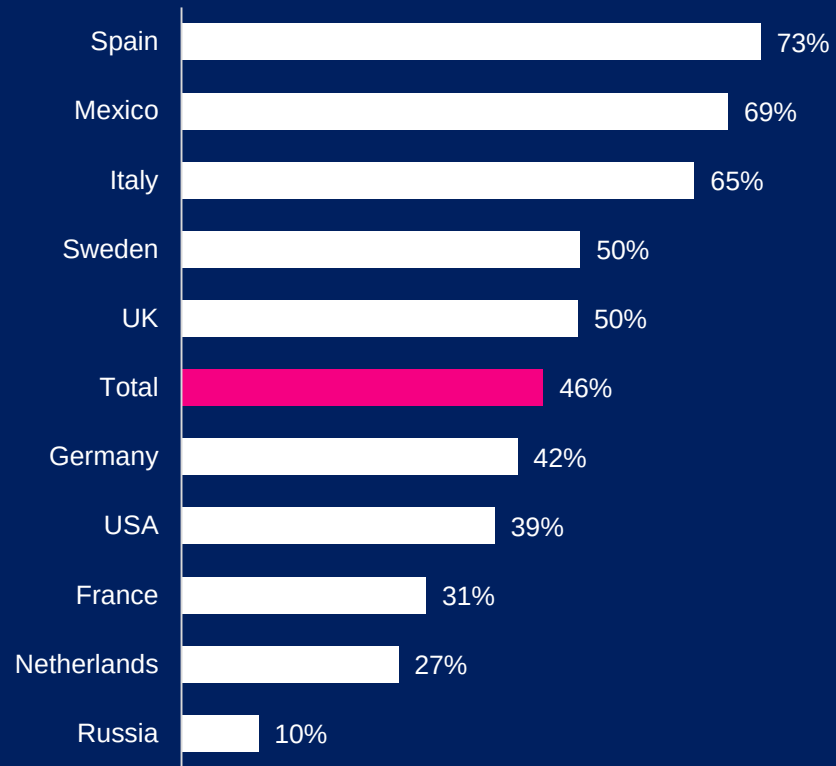
Not anymore

■ 18-25 years ■ 26-45 years ■ 46-65 years ■ 66-80 years



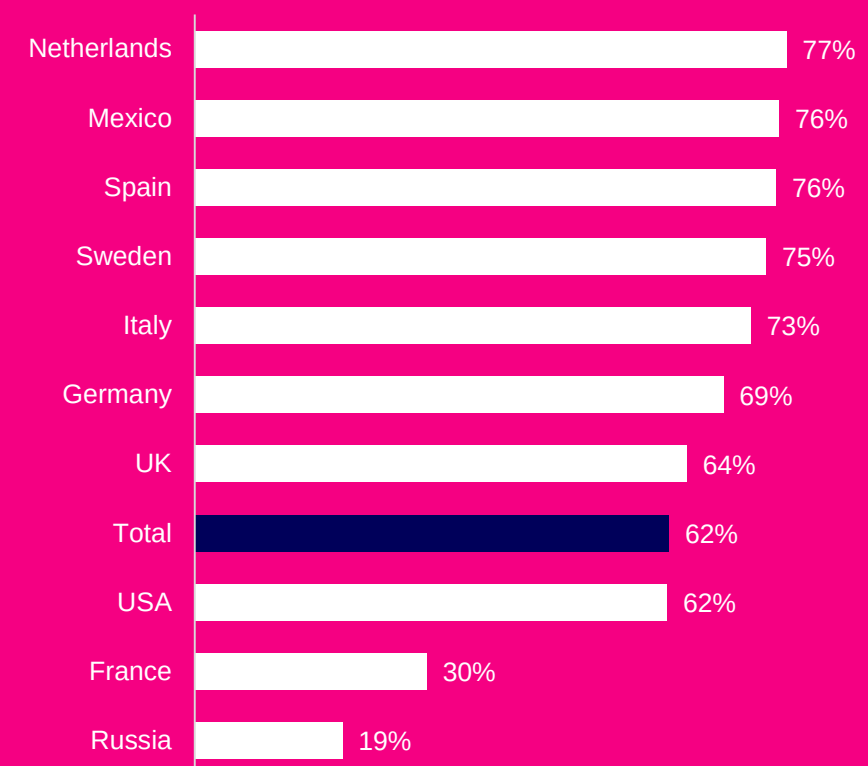
People in most countries say they have stopped shaking hands with others

Kissing others



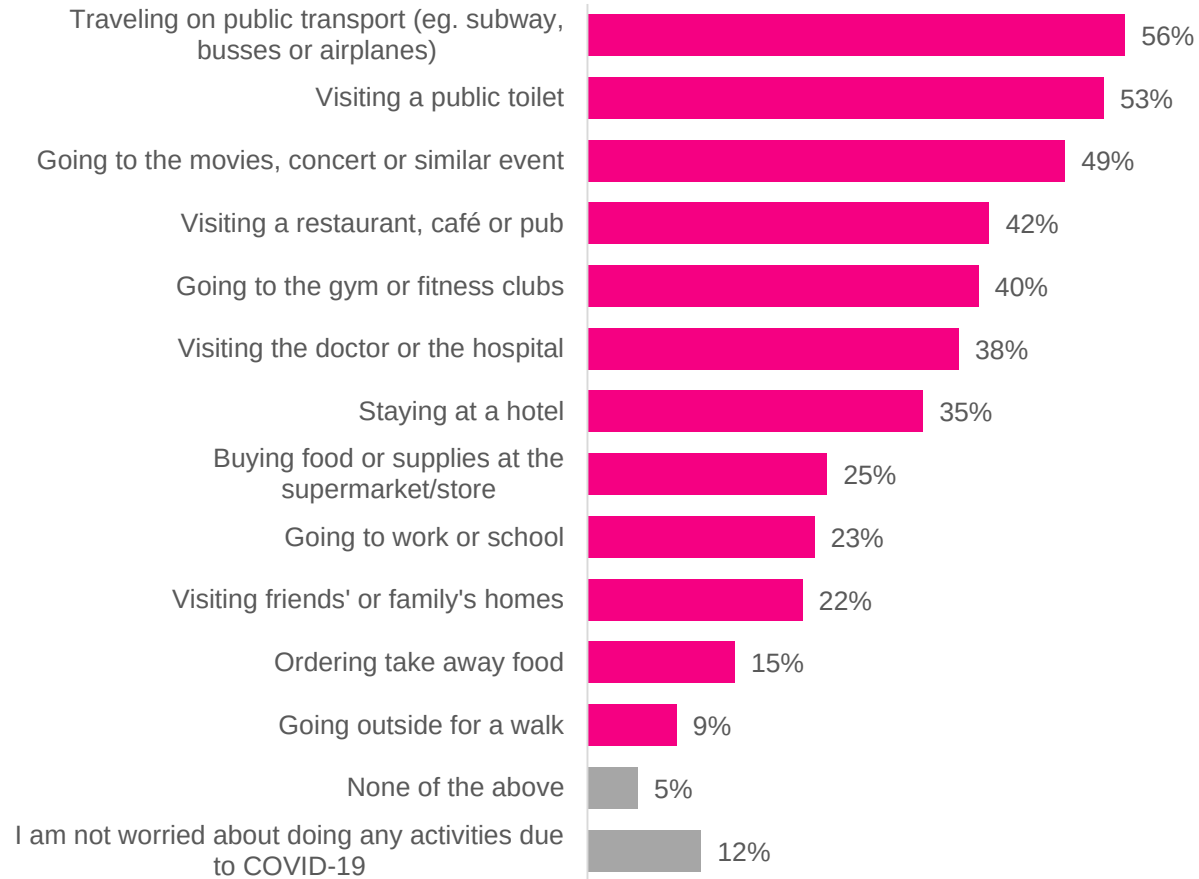
Base: Not anymore

Shake hands with others

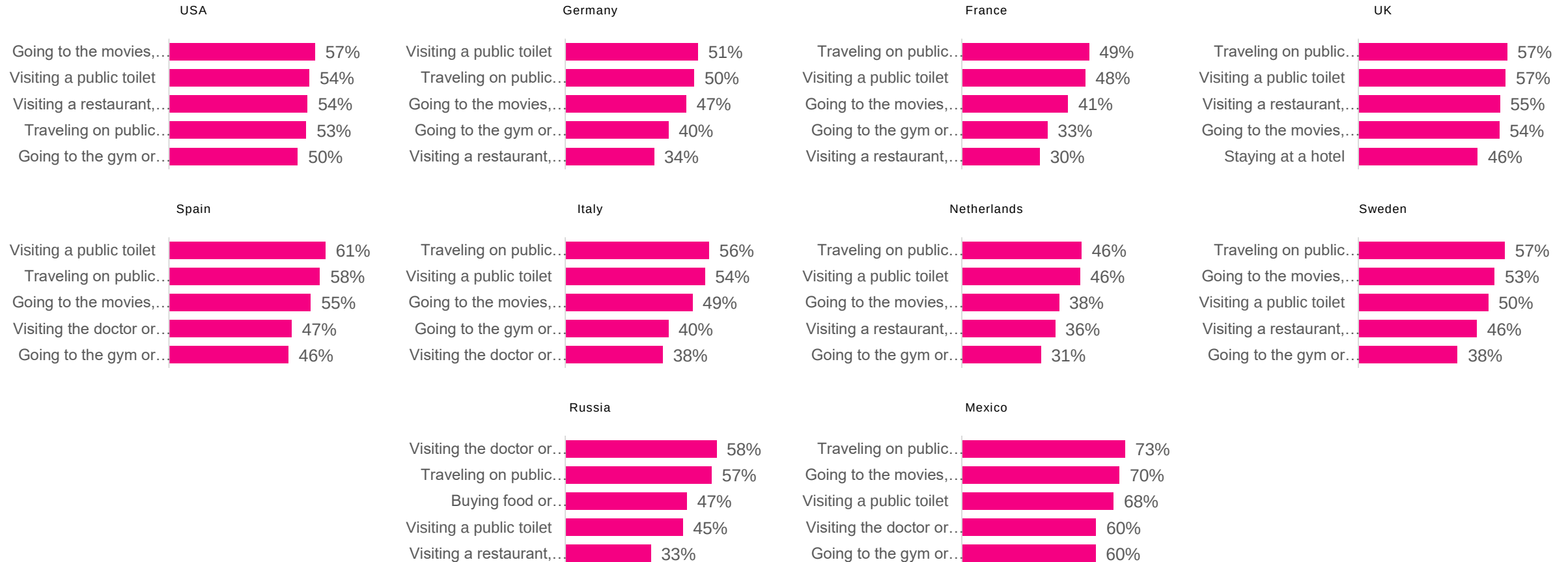


Base: Not anymore

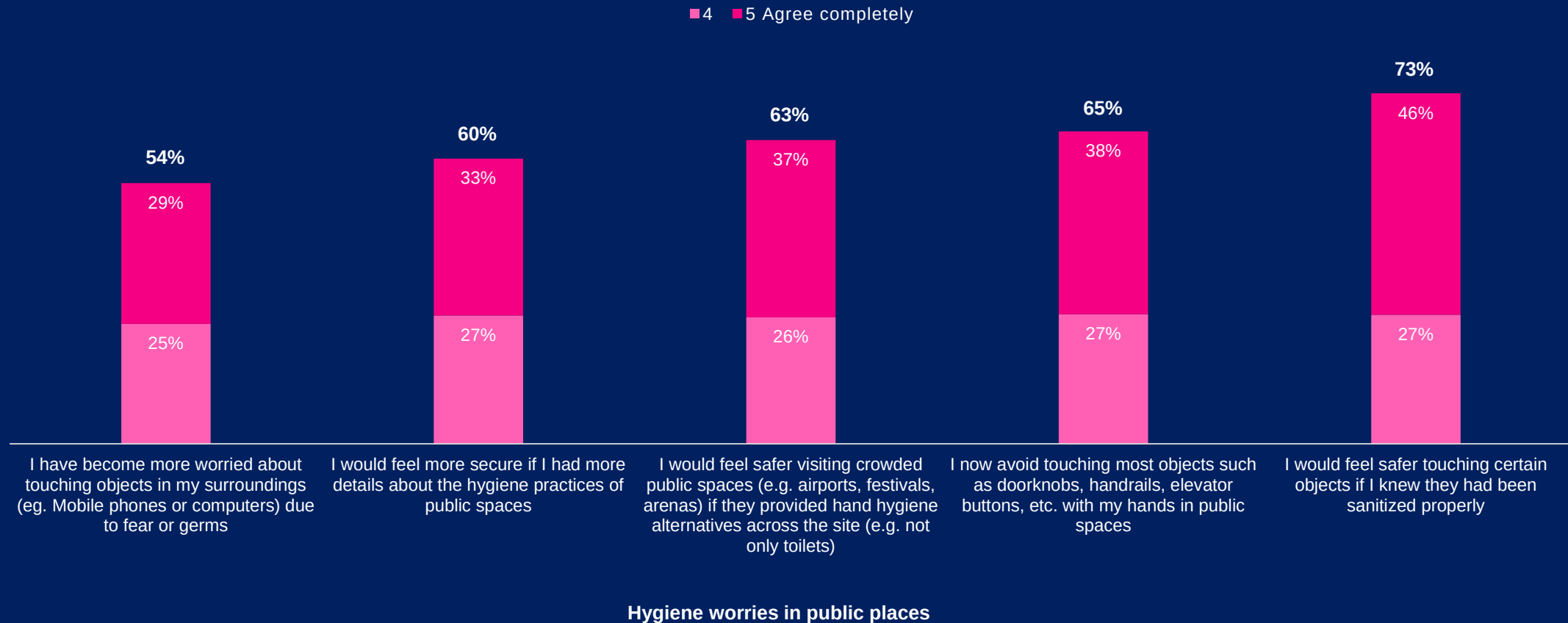
Public transport and toilets are most worrying for those concerned about the virus



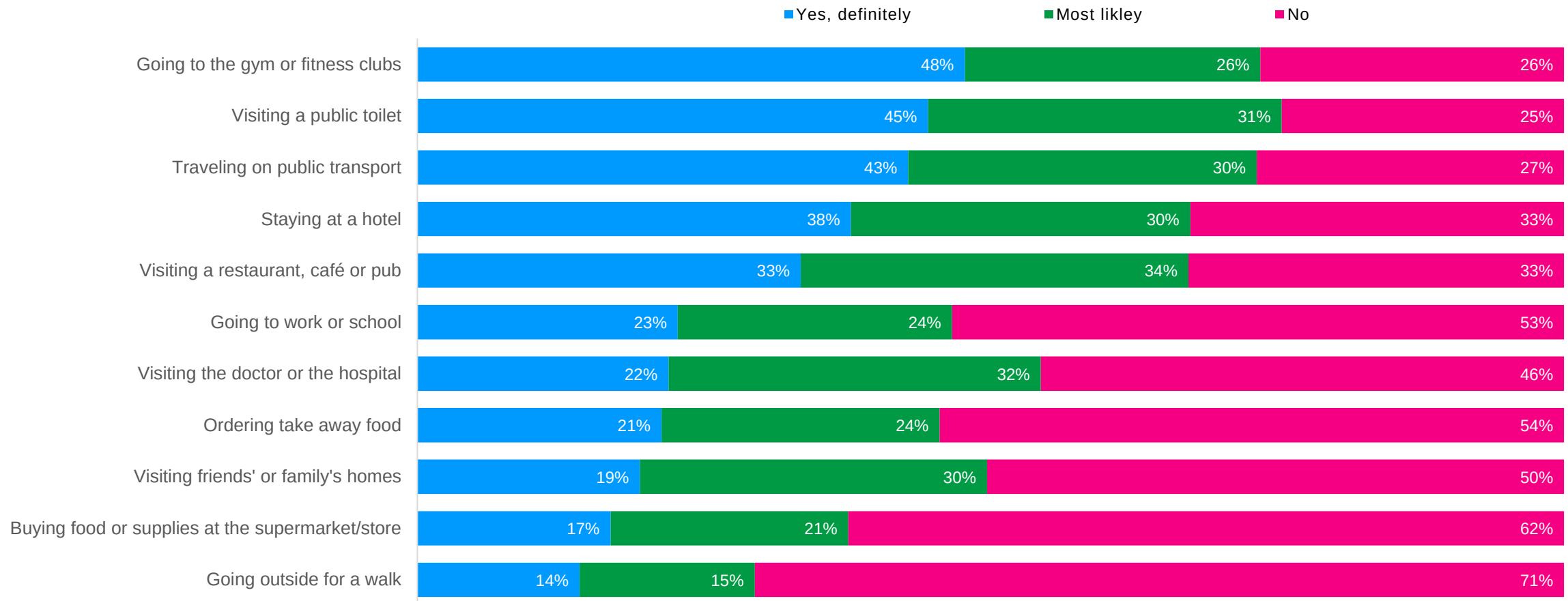
Going to the movies and traveling by public transport are concerns for all countries



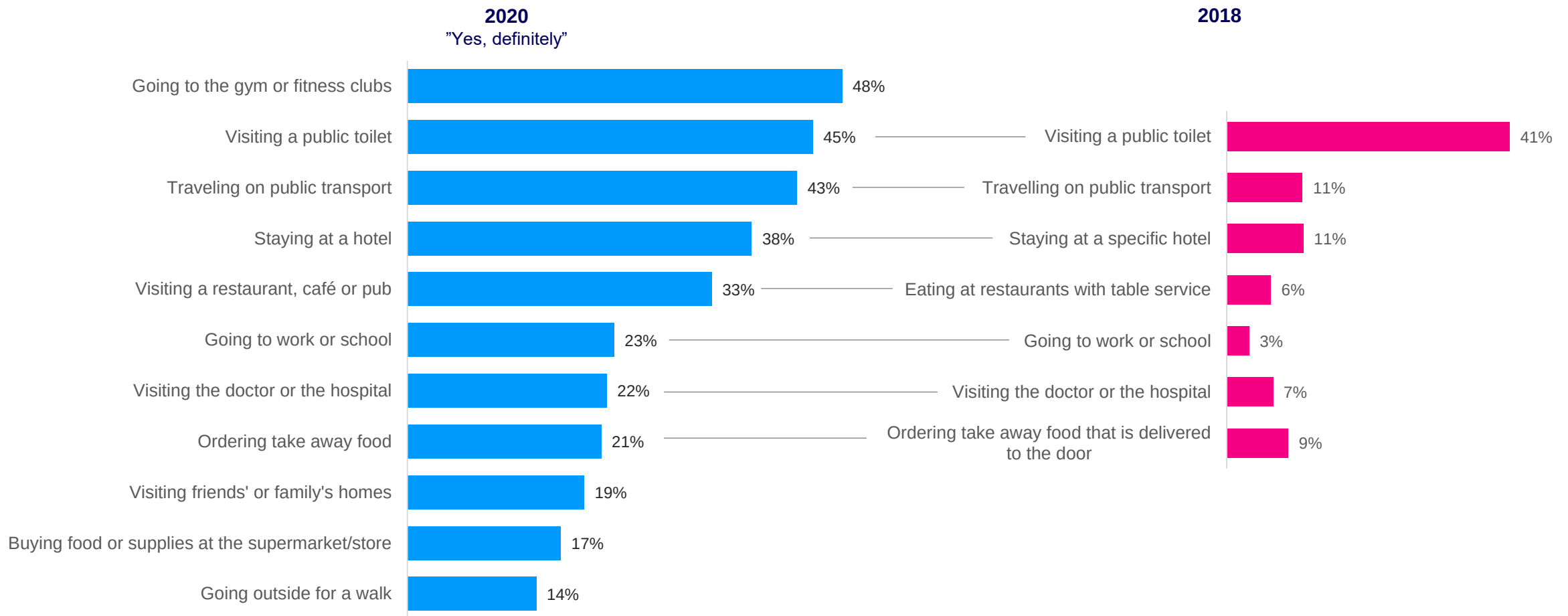
6 in 10 would feel safer visiting crowded public spaces if they provided more hand hygiene stations



Most common to refrain from visiting gyms, public toilets and traveling by public transport



Previously, only public toilets were a big hygiene concern

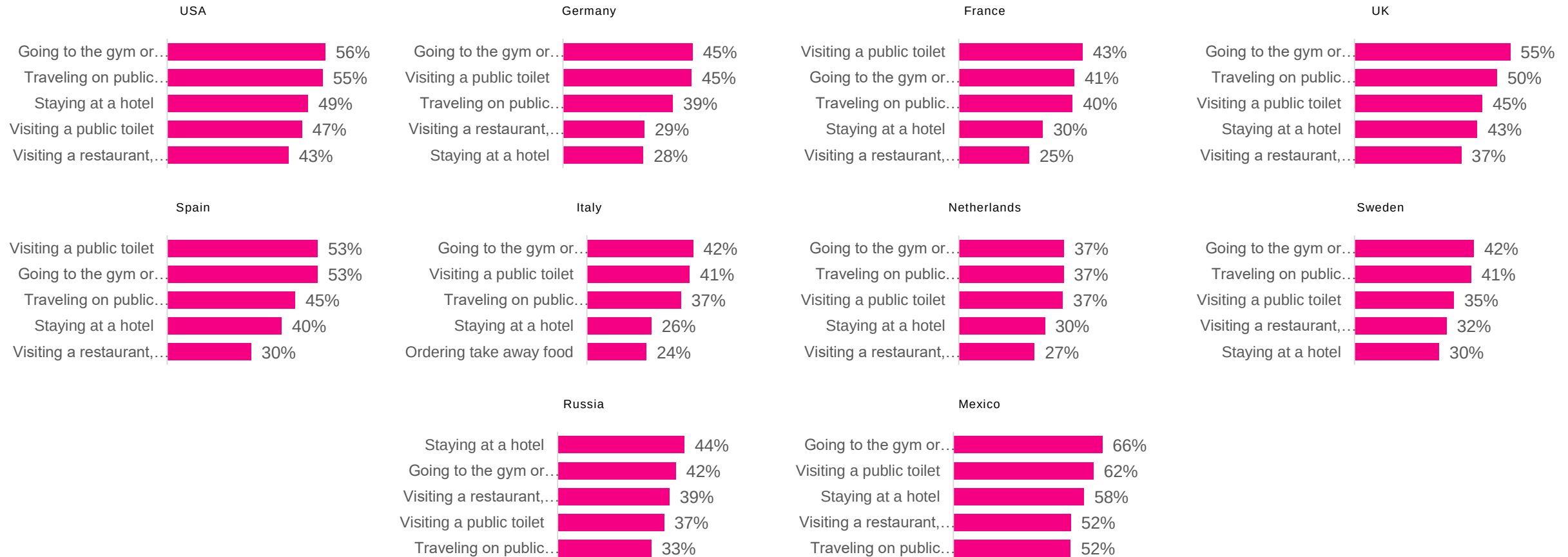


2020: Will you actively refrain from any of the following activities during the coming months because you are concerned about the possibility of catching or spreading COVID-19?

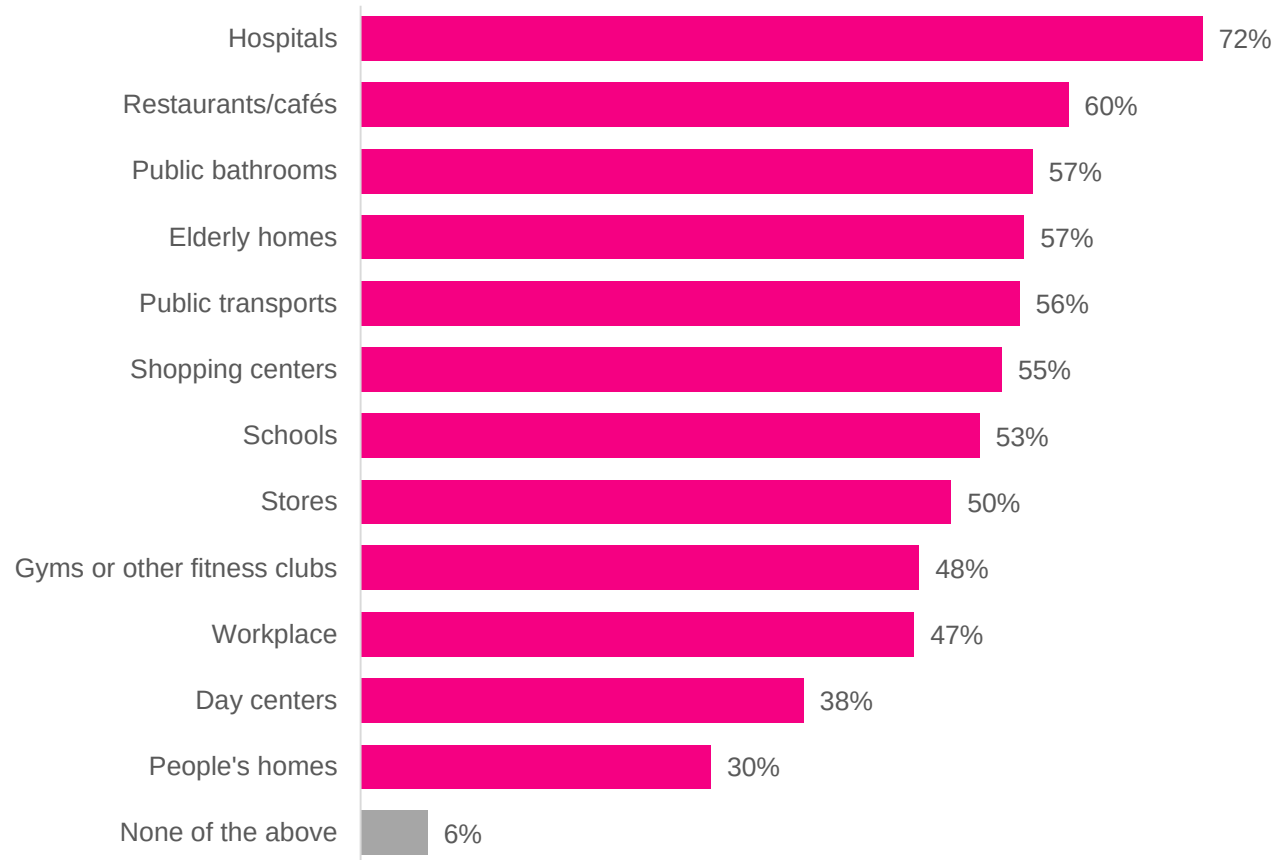
2018: Have you recently decided NOT to do any of the following activities due to the fact that you were concerned about the lack of hygiene and cleanliness?

Filter: Only using 10 of 15 markets to be comparable to 2020 COVID-19 results

In most countries, people are not going to visit the gym due to fear of catching or spreading COVID-19

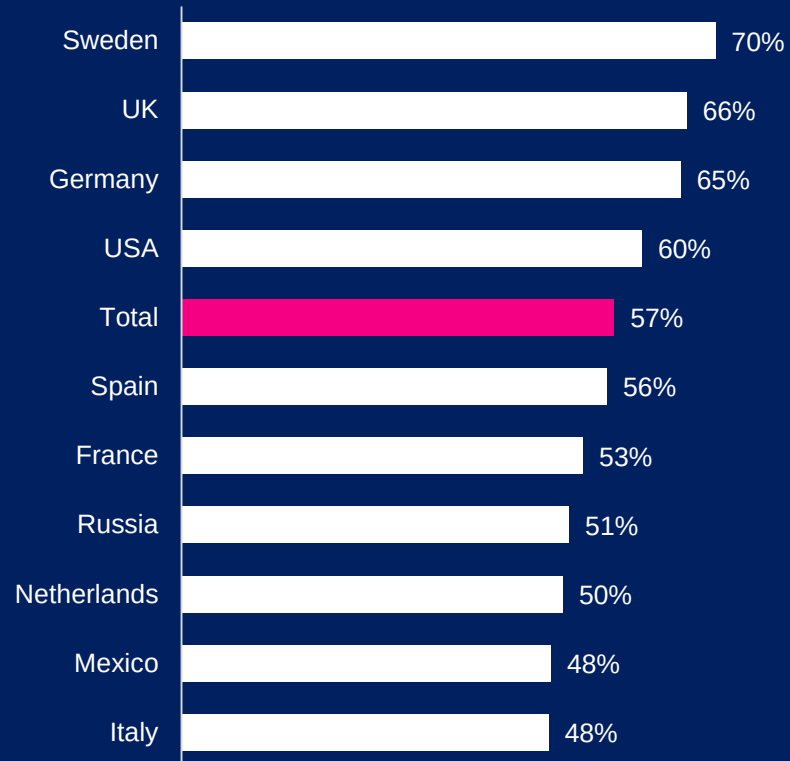


Expectation to increase hygiene standards is high for most public spaces

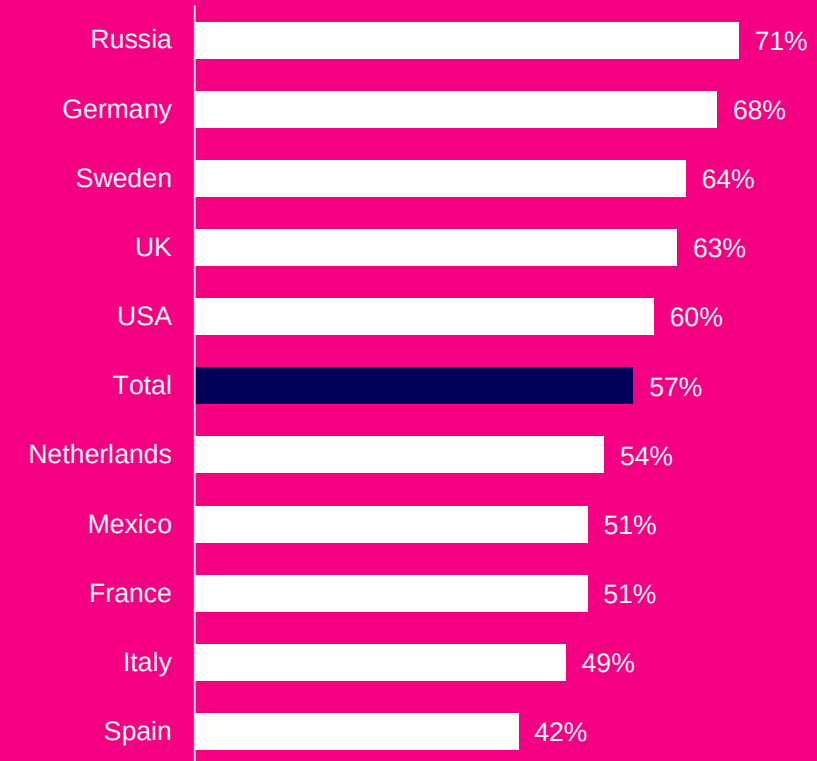


Sweden has the highest expectations on hygiene standards at elderly homes

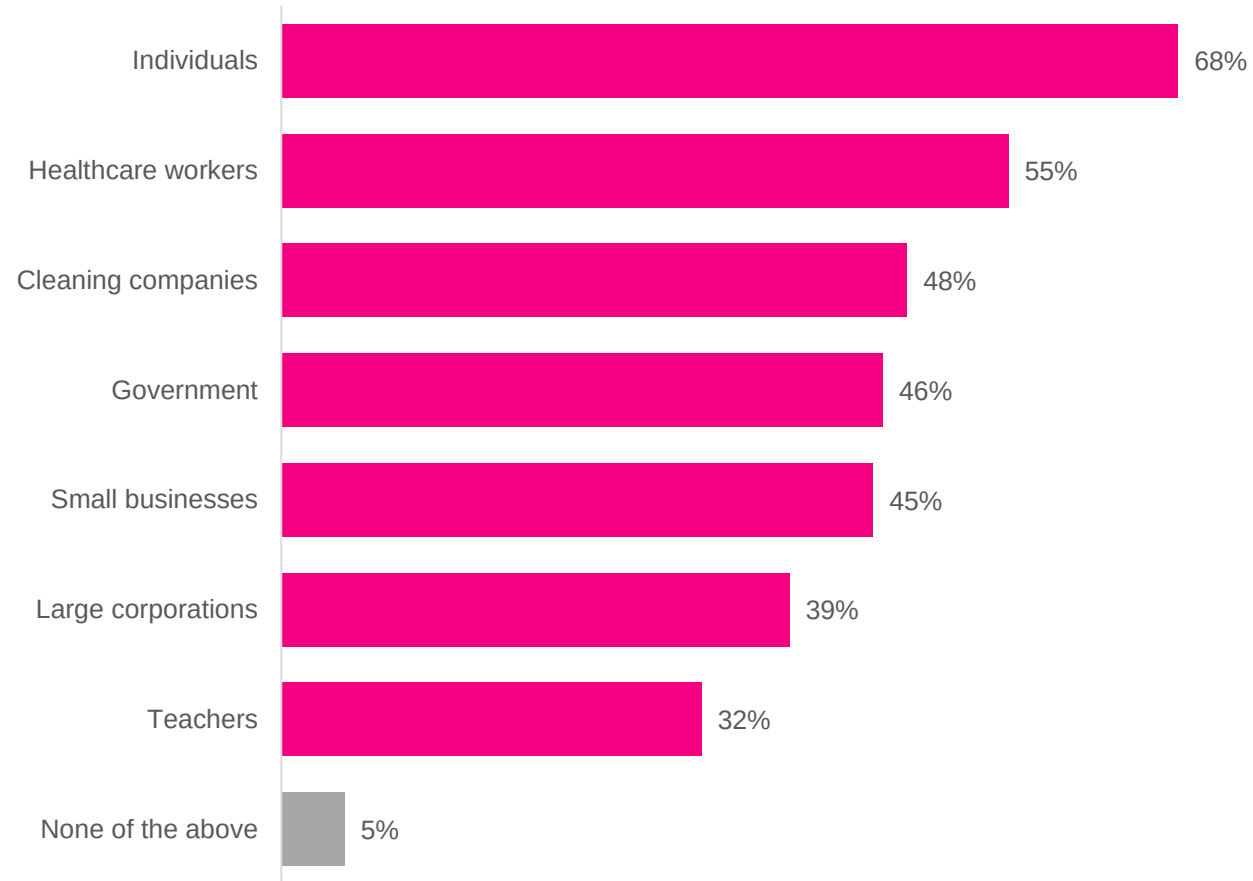
Elderly homes



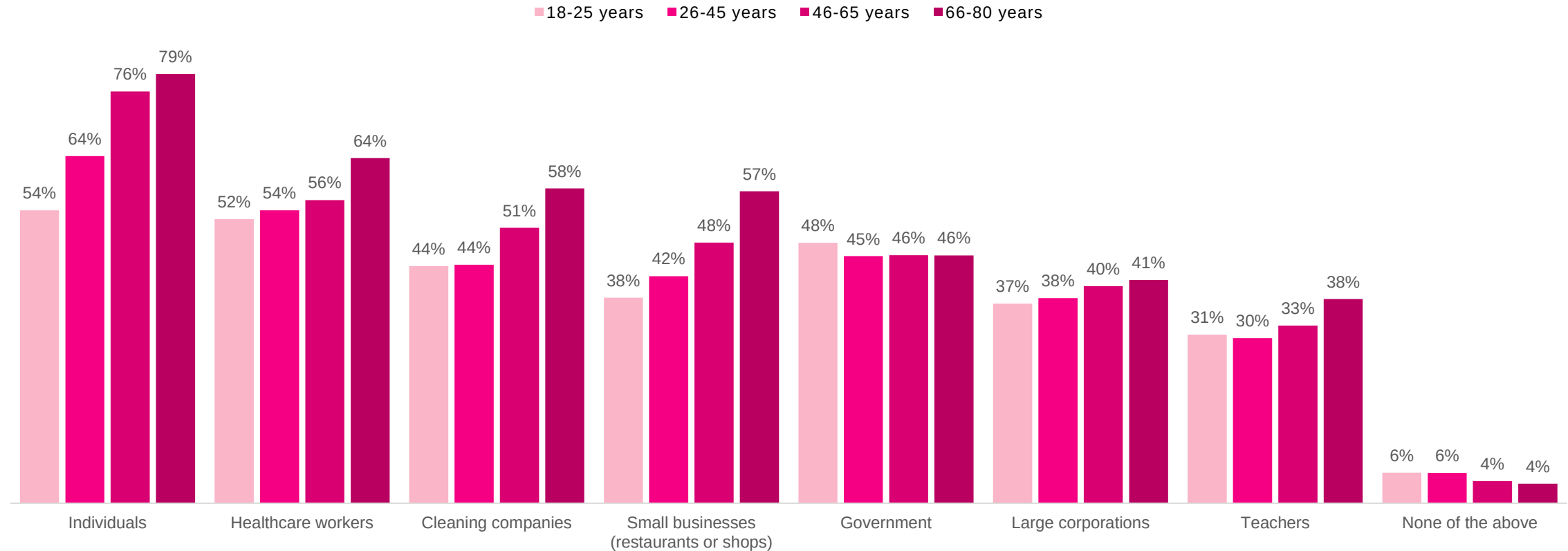
Public bathrooms



Most put the responsibility on individuals before government or professionals for the hygiene standard in public spaces

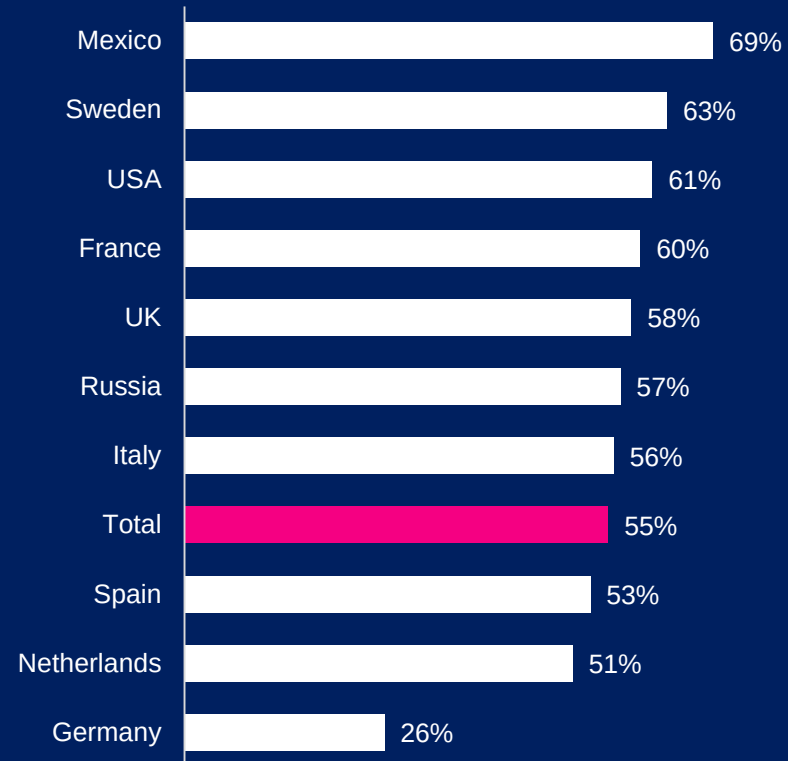


Older generations put more responsibility on all actors

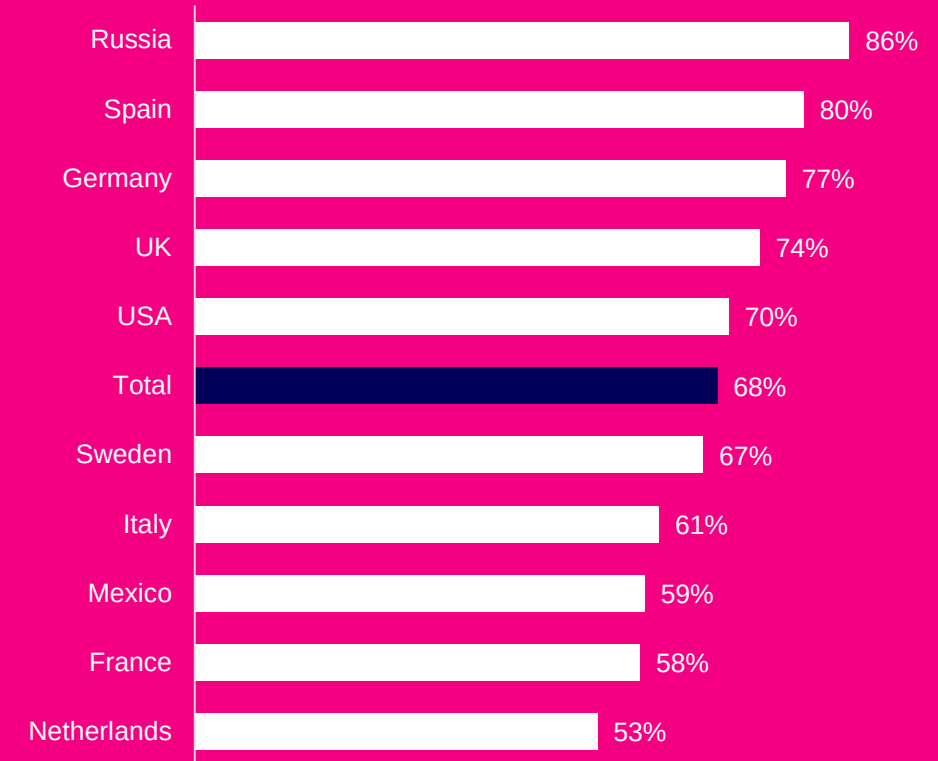


Russia and Spain put much more responsibility on the individual instead of healthcare workers

Healthcare workers

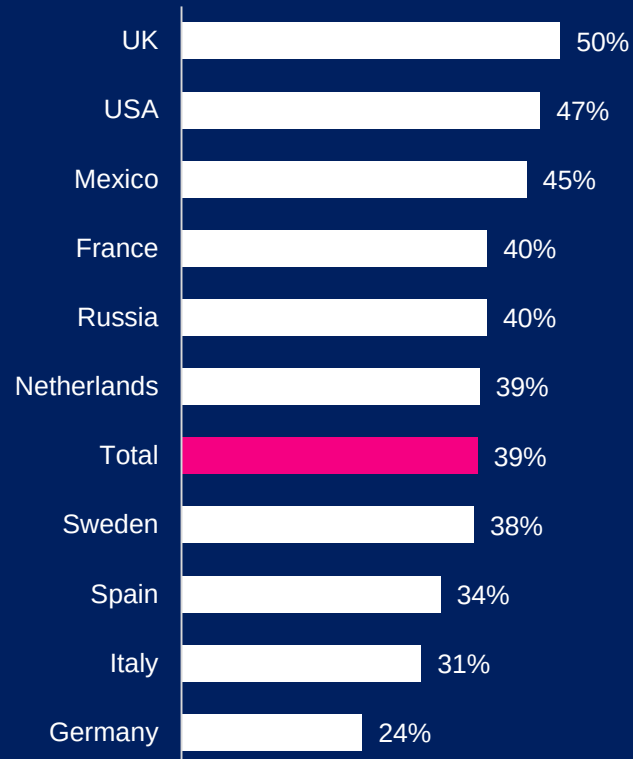


Individuals

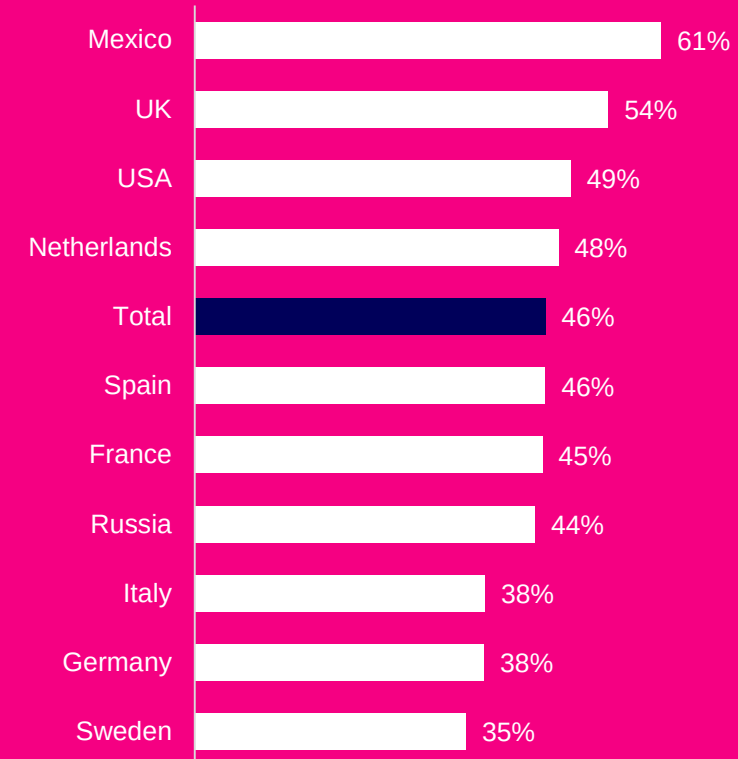


Sweden put more responsibility on large corporations than on the government

Large corporations



Government



Summary - Hygiene in public spaces

3 in 4 say they now most likely will avoid visiting public toilets

6 in 10 would feel safer visiting crowded public spaces if they provided more hand hygiene stations

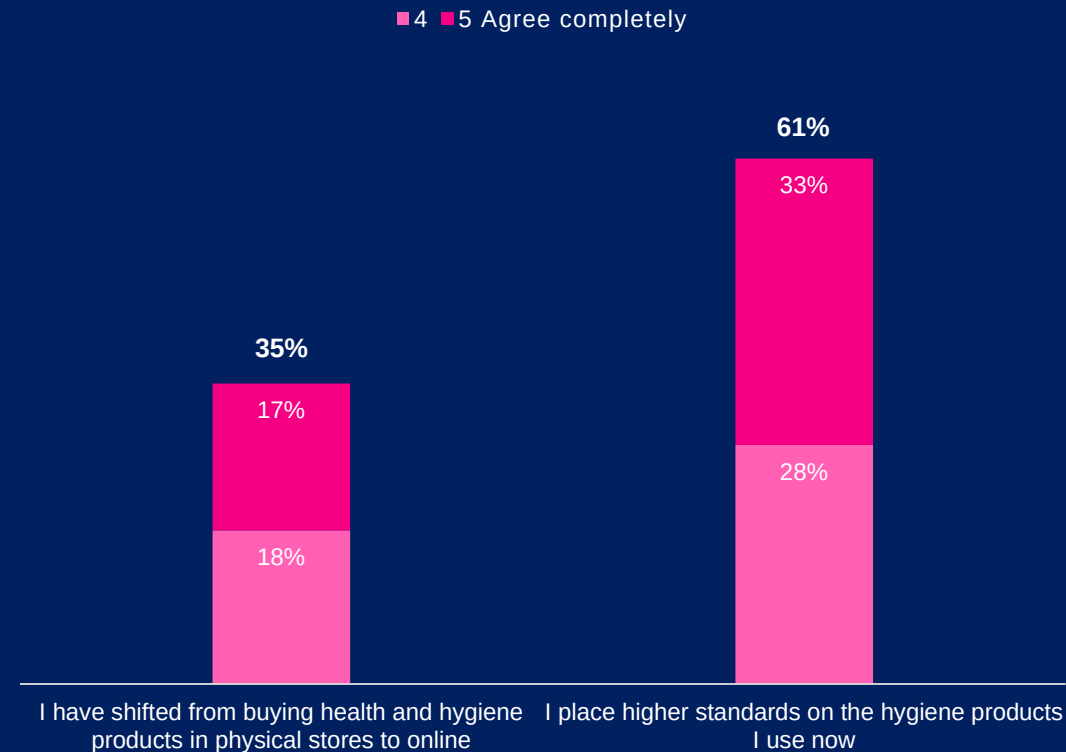
65% now avoid touching most objects with their hands in public spaces

6 in 10 do not shake hands with others anymore

68% think individuals are more responsible for maintaining high hygiene standards in public spaces - in comparison to healthcare workers, cleaning companies and the government

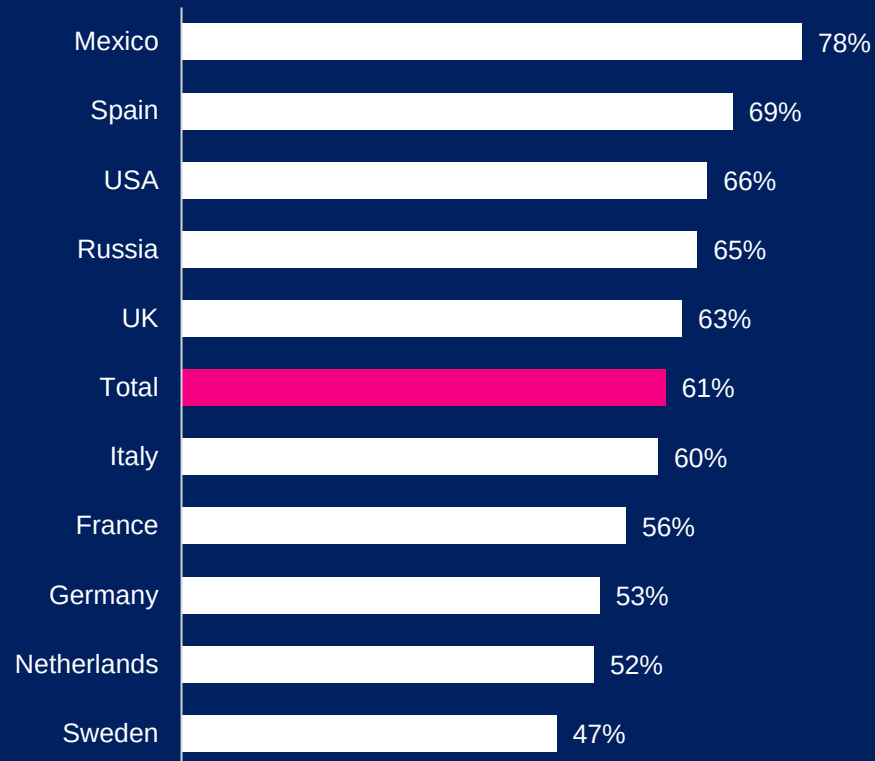
Consumption

6 in 10 now place higher standards on the hygiene products they use

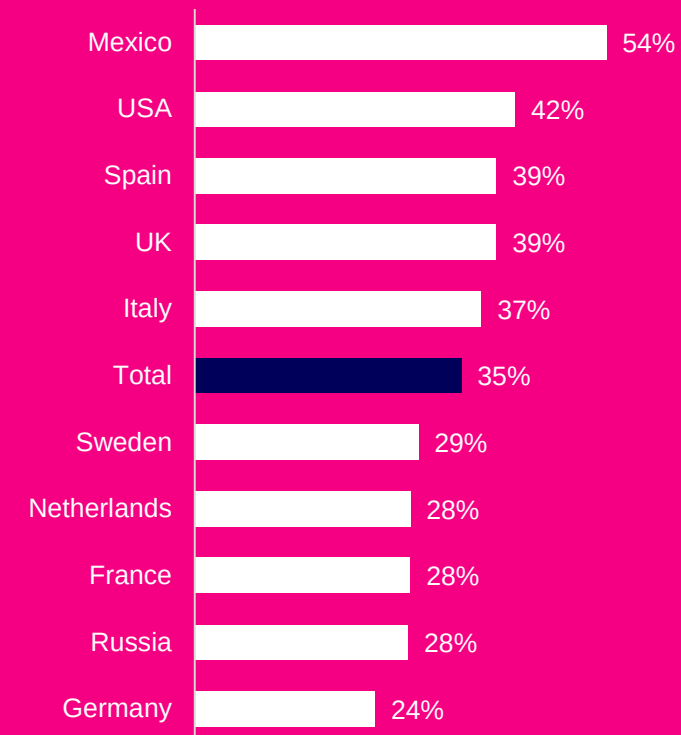


A large shift in Mexico from buying hygiene products in physical stores to online

I place higher standards on the hygiene products I use now

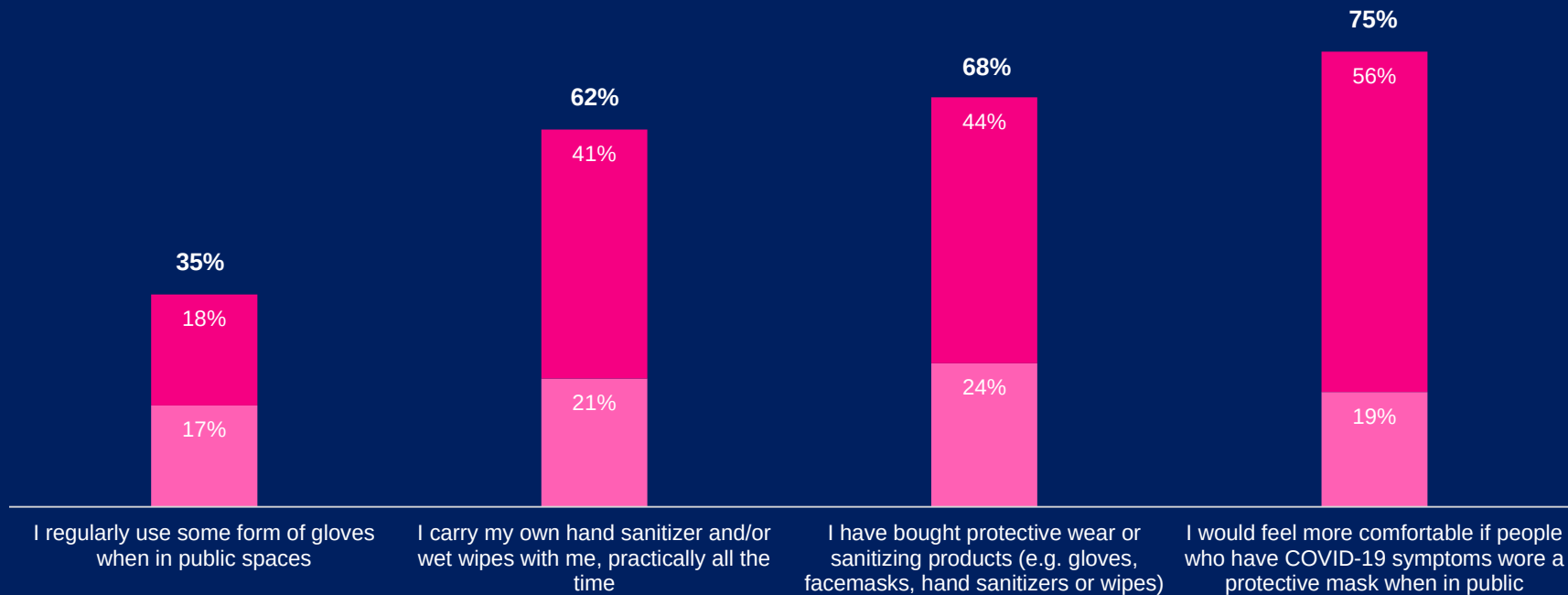


I have shifted from buying health and hygiene products in physical stores to online



7 in 10 have bought some form of protective wear or hand sanitizing product

■ 4 ■ 5 Agree completely



Use of protective gear

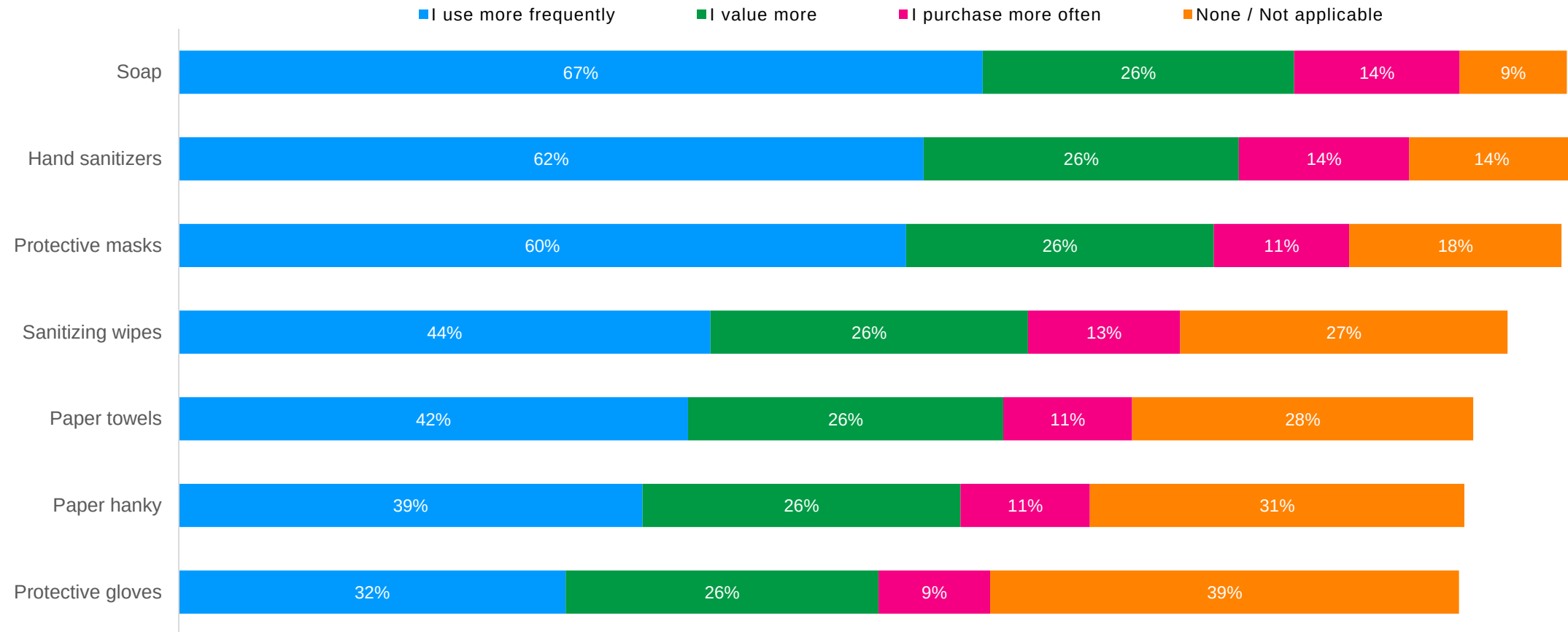


I carry my own hand sanitizer and/or wet wipes with me, practically all the time

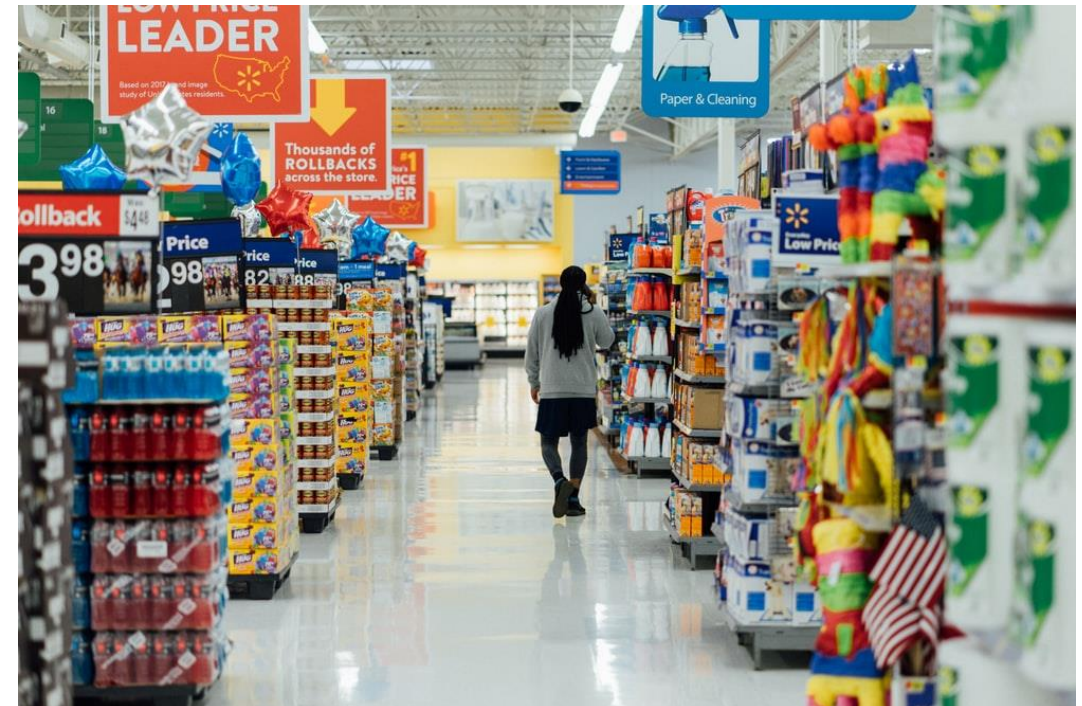
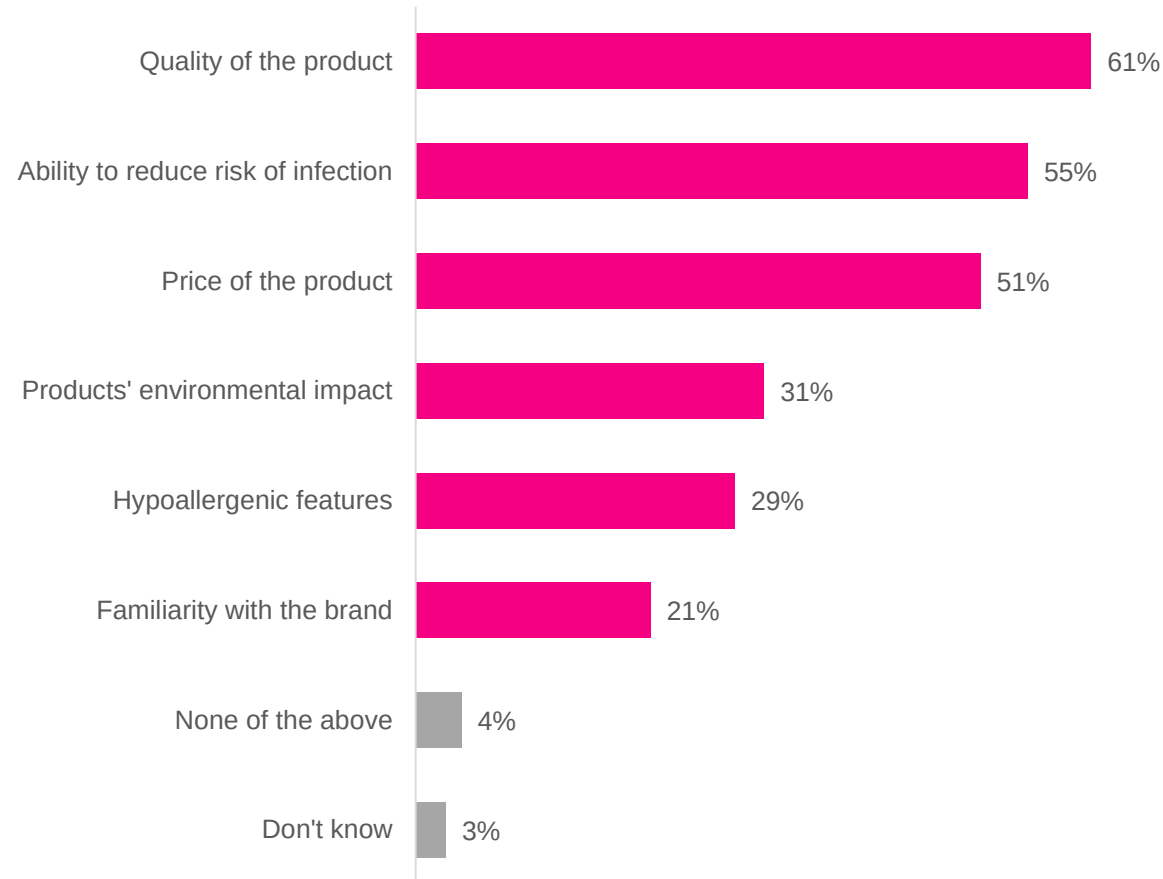
71%

53%

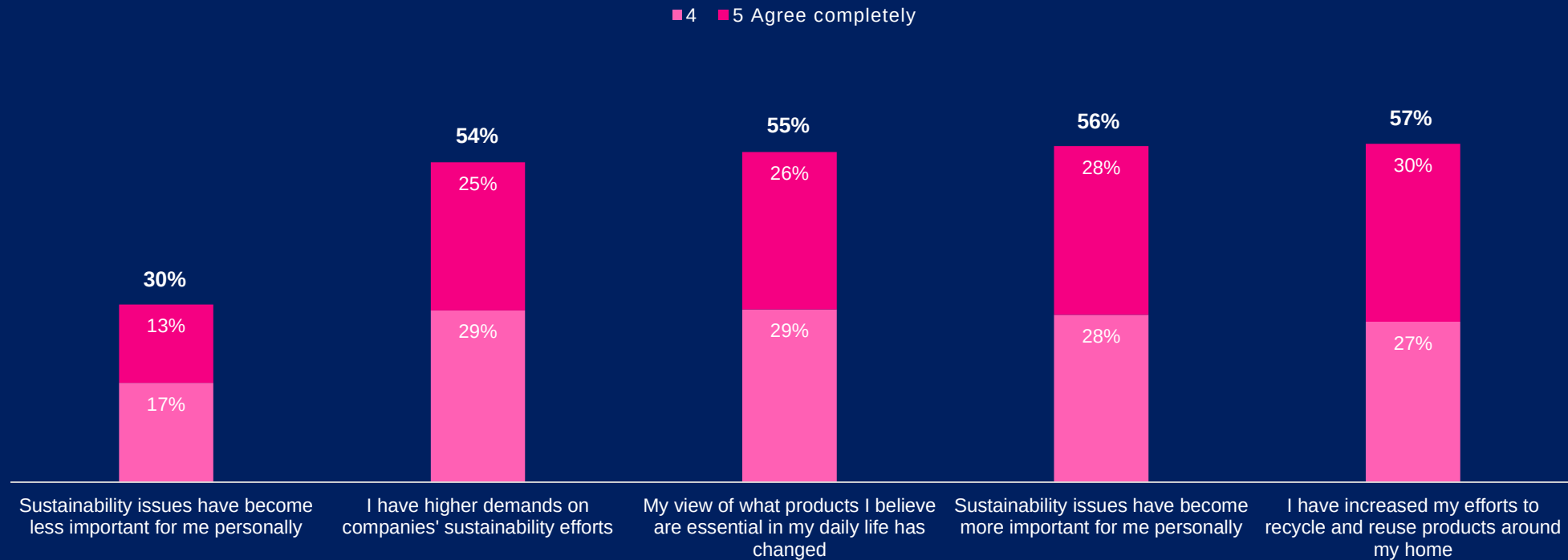
7 in 10 use soap more frequently since the spread of COVID-19



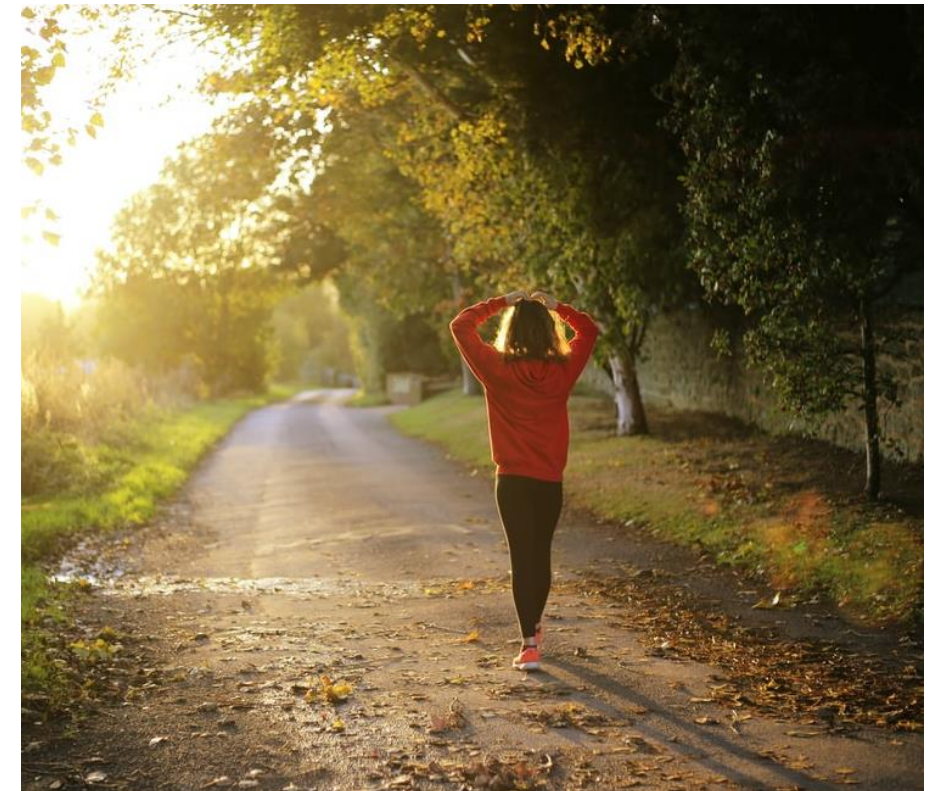
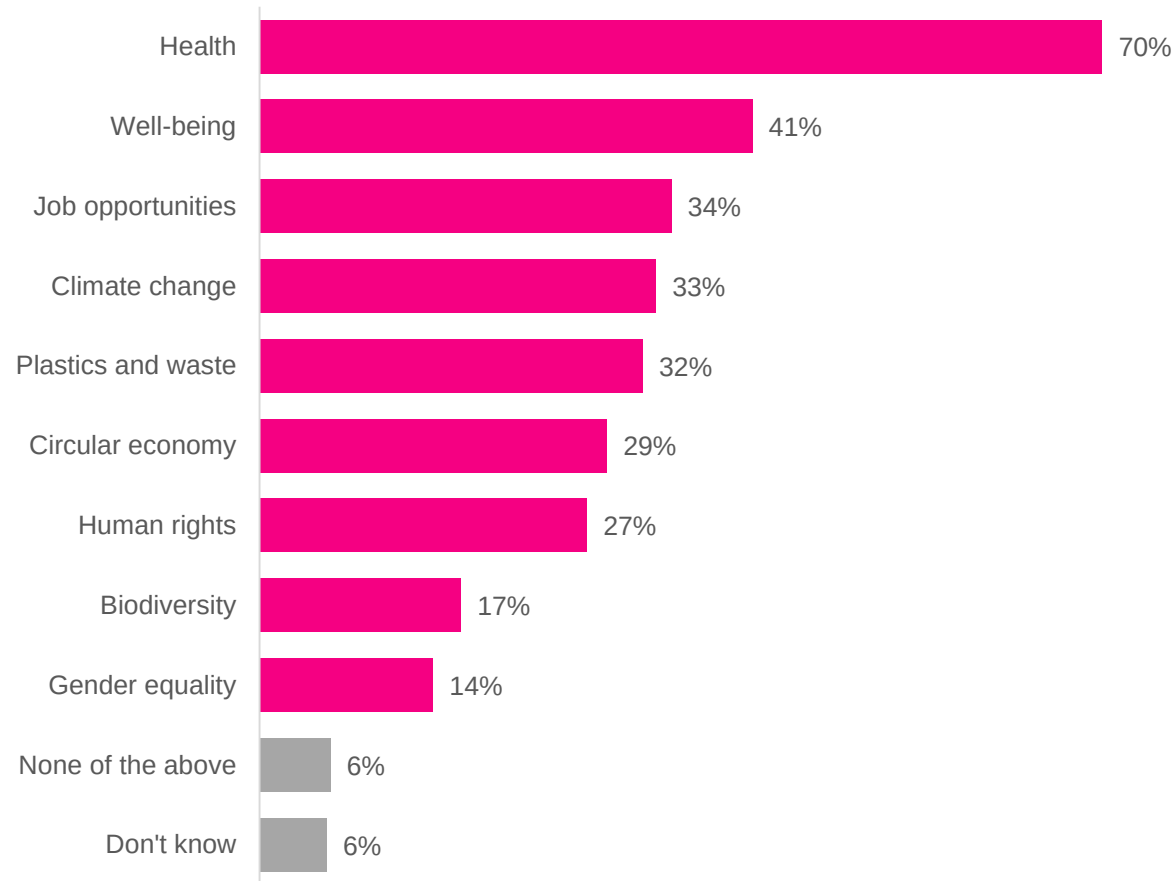
Overall quality and ability to reduce risk of infection are most important when buying hygiene products



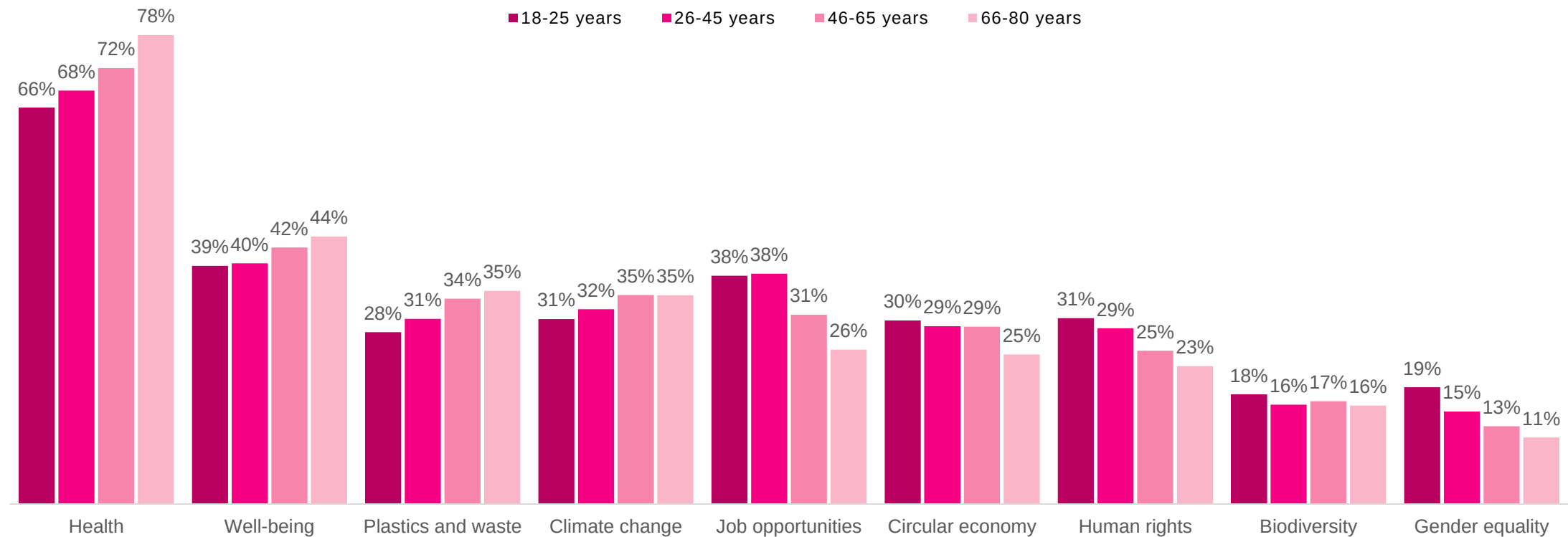
Half say their view of what products are essential in daily life has changed since the spread of the pandemic



When it comes to sustainability - health and well-being now come before climate change



Importance increases with age when it comes to health, well-being and waste



Summary - Consumption

7 in 10 have bought some form of protective wear or hand sanitizing product

1 in 2 say their view of what products are essential in daily life has changed since the spread of COVID-19

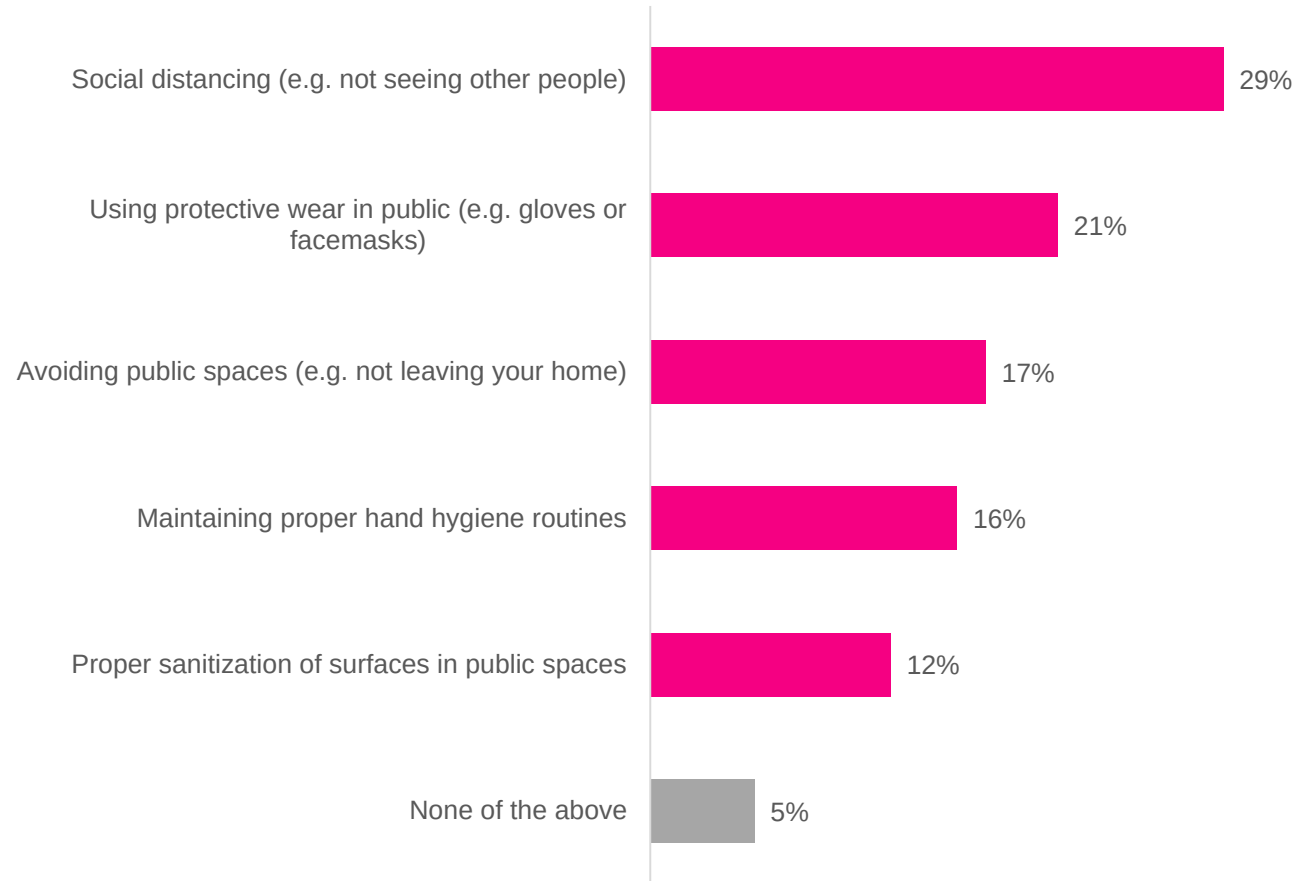
7 in 10 use soap more frequently since the spread of COVID-19

56% say that sustainability issues have become more important during the pandemic

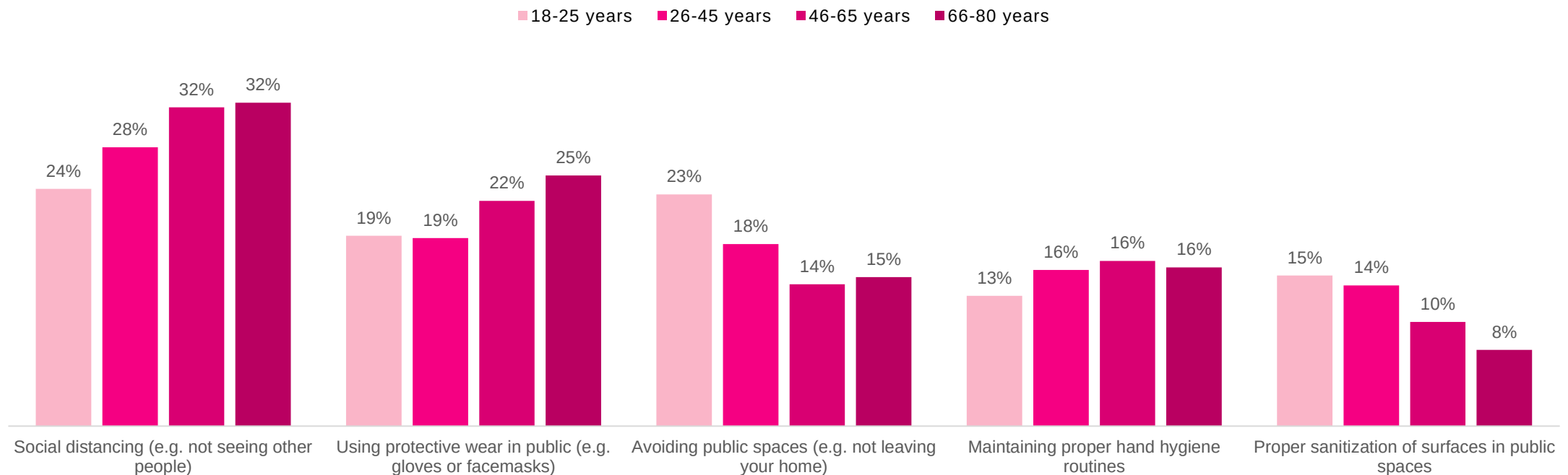
70% say that health as a sustainability area has become more important in recent months

Public policy and experts

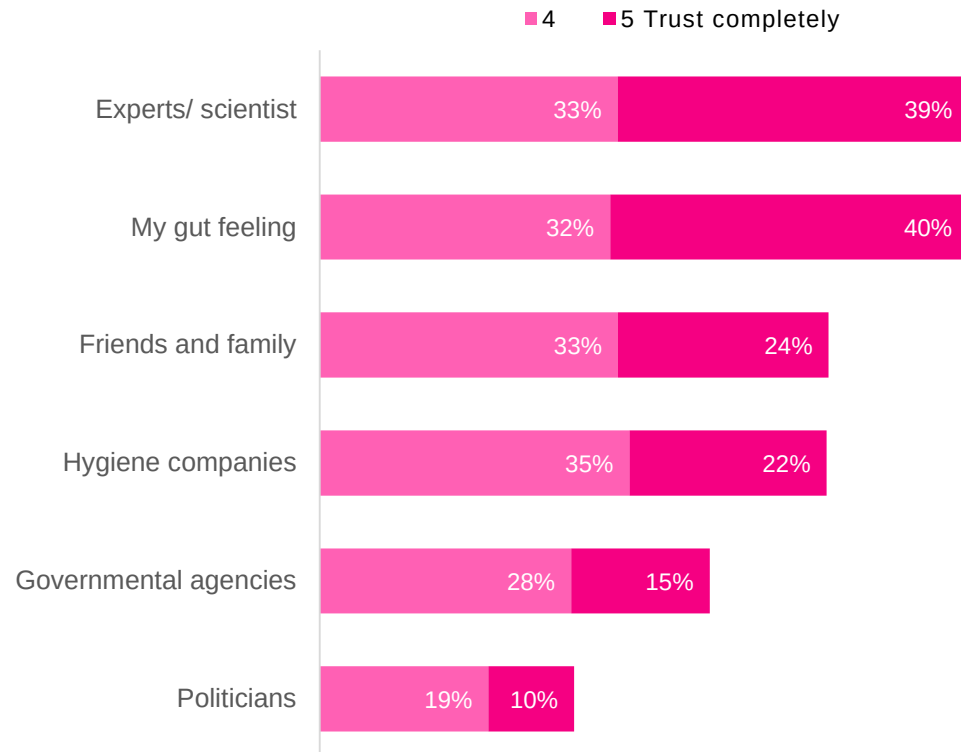
Social distancing and using protective wear are seen as most effective in combating COVID-19



Older generations believe more in social distancing



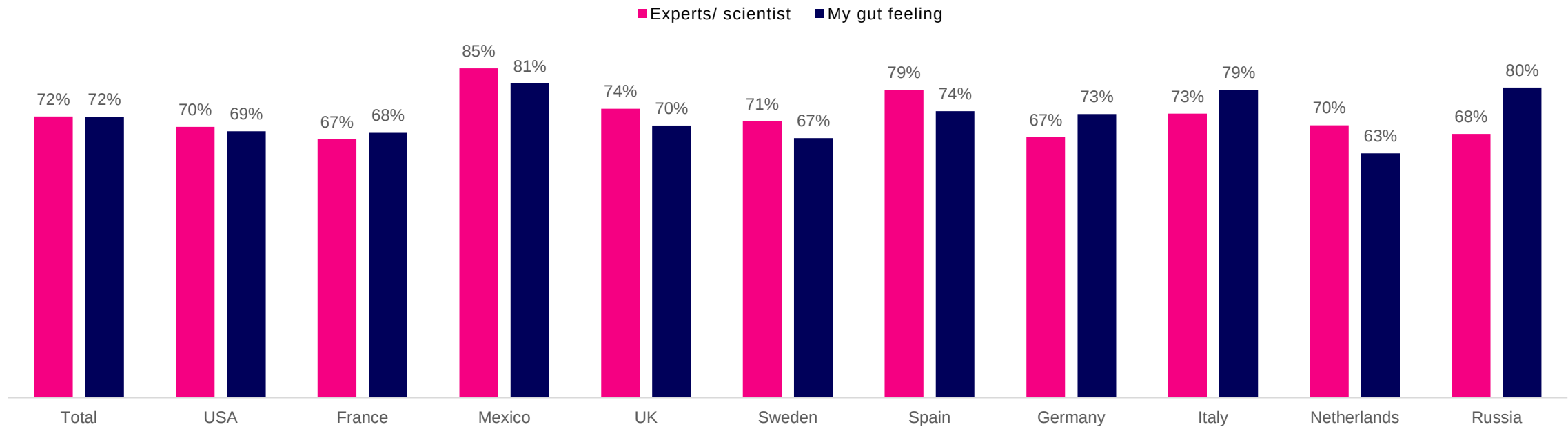
People trust their gut feeling as much as they trust experts



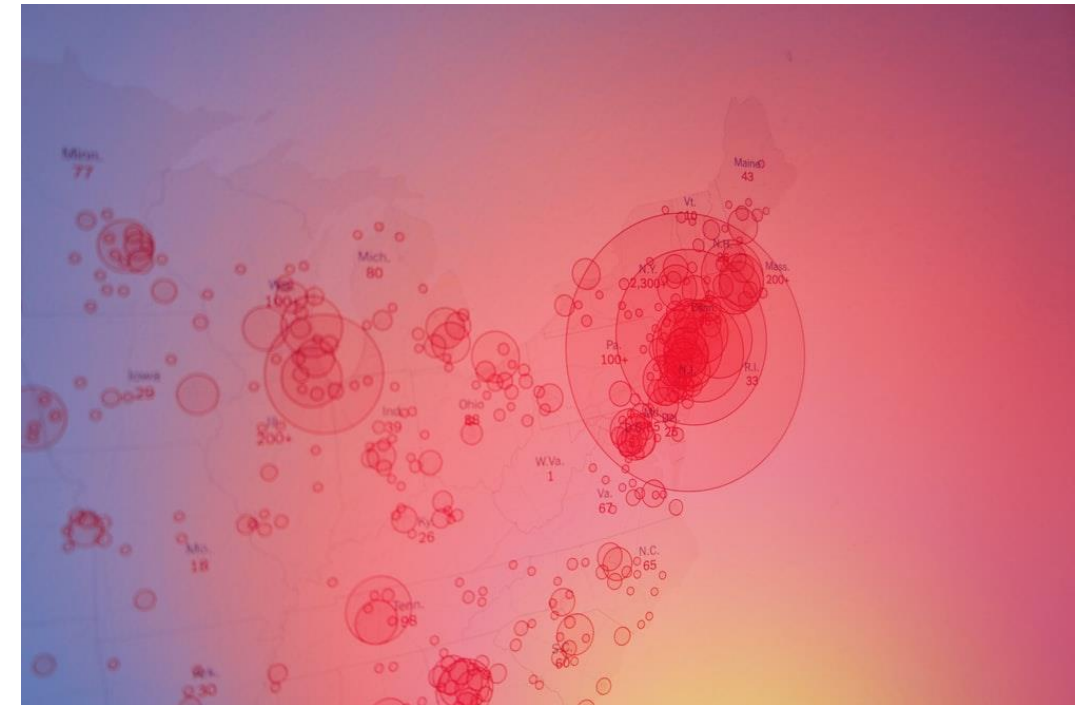
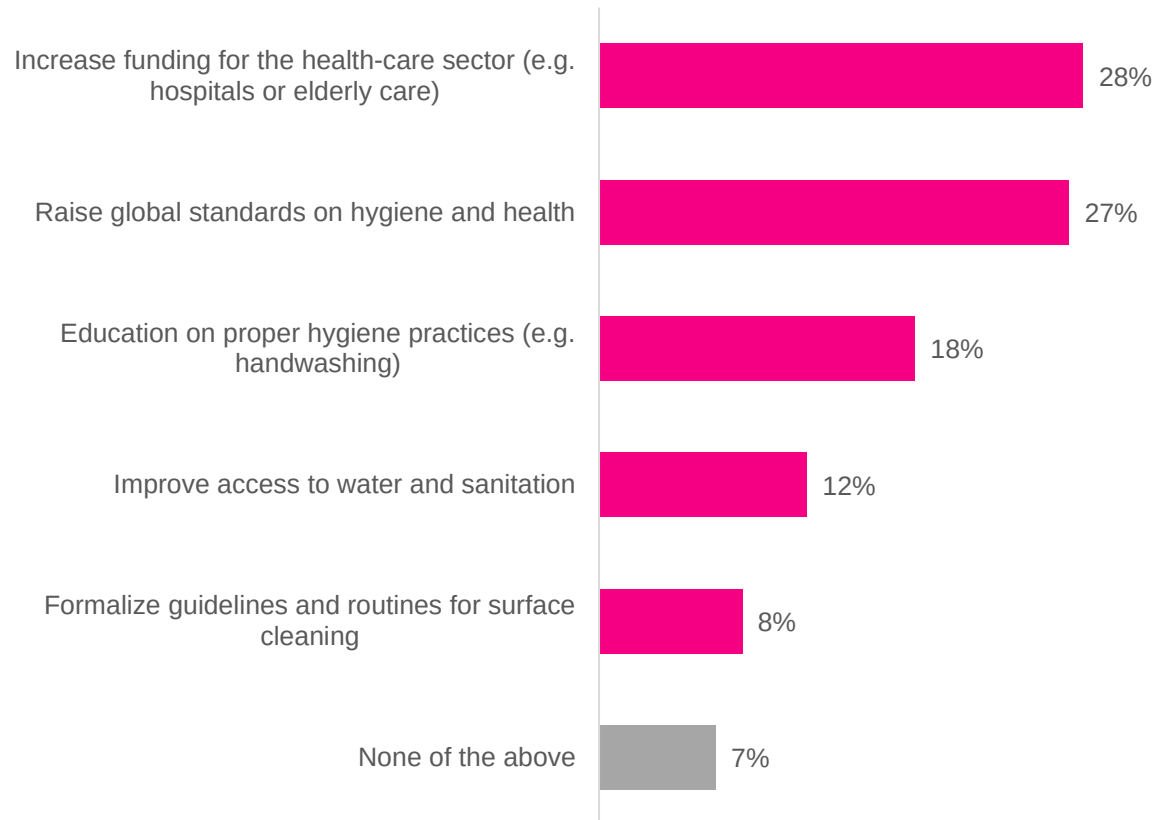
Experts
72%

Gut feeling
72%

The pattern seems to hold for most markets – the differences are very small



3 in 10 say we need to raise global hygiene standards to prevent new pandemics



Summary - Public policy and experts

3 in 10 say that social distancing is most effective in combating COVID-19

72% trust experts regarding recommendations on hand hygiene

72% trust their gut feeling when it comes to recommendations on hand hygiene

3 in 10 say we need to raise global hygiene standards to prevent new pandemics

Part 2: Global Survey

Part 2: Global Survey



For 2020, answers from a total of **15 408** respondents have been collected from **15 markets**.



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



Data collection took place during **December 2019 - January 2020** through web panels in the respective countries

Respondents per market

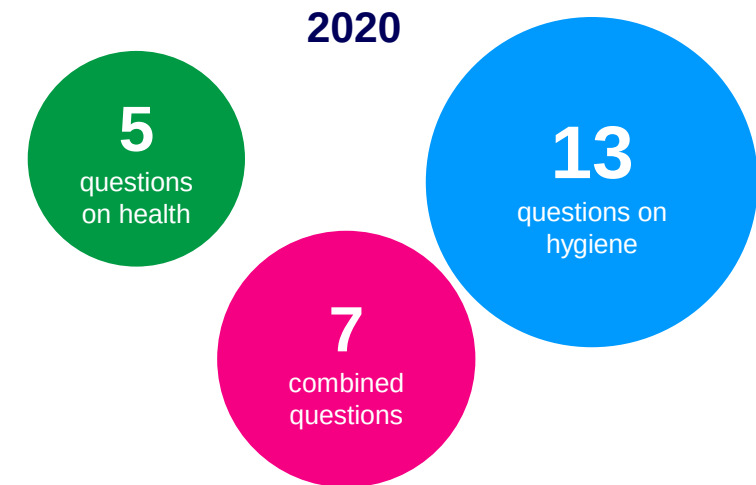
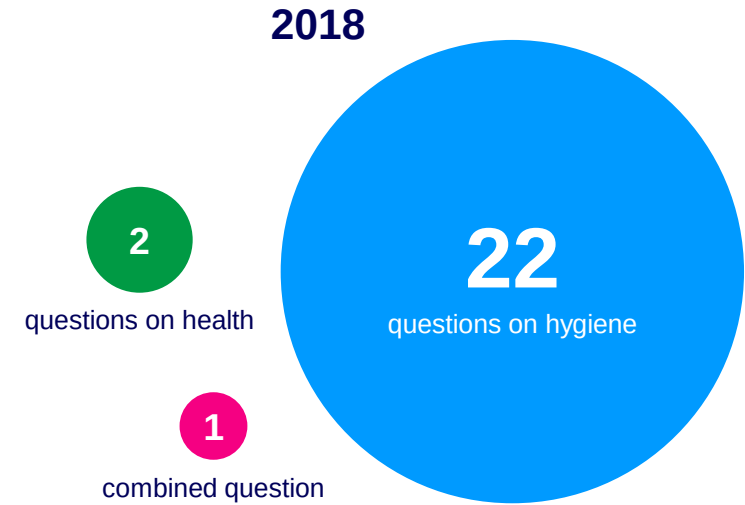
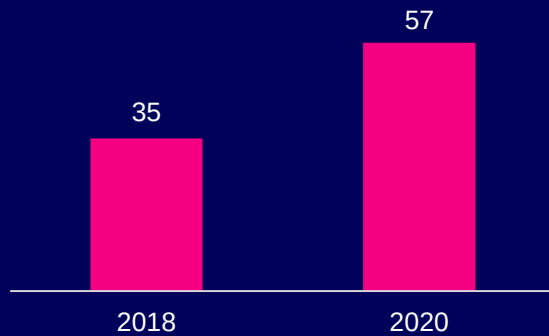
Australia	1014
Brazil	1040
China	1067
France	1056
Germany	1009
India	1000
Italy	1030
Mexico	1021
The Netherlands	1011
Russia	1026
South Africa	1017
Spain	1059
Sweden	1014
United Kingdom	1025
USA	1019

What's new for 2020?

Updated content

- More questions on **health-related issues**
- More focus on **stigmatization** and **taboos**
- More **local questions** to increase relevance in each market

Number of unique local questions

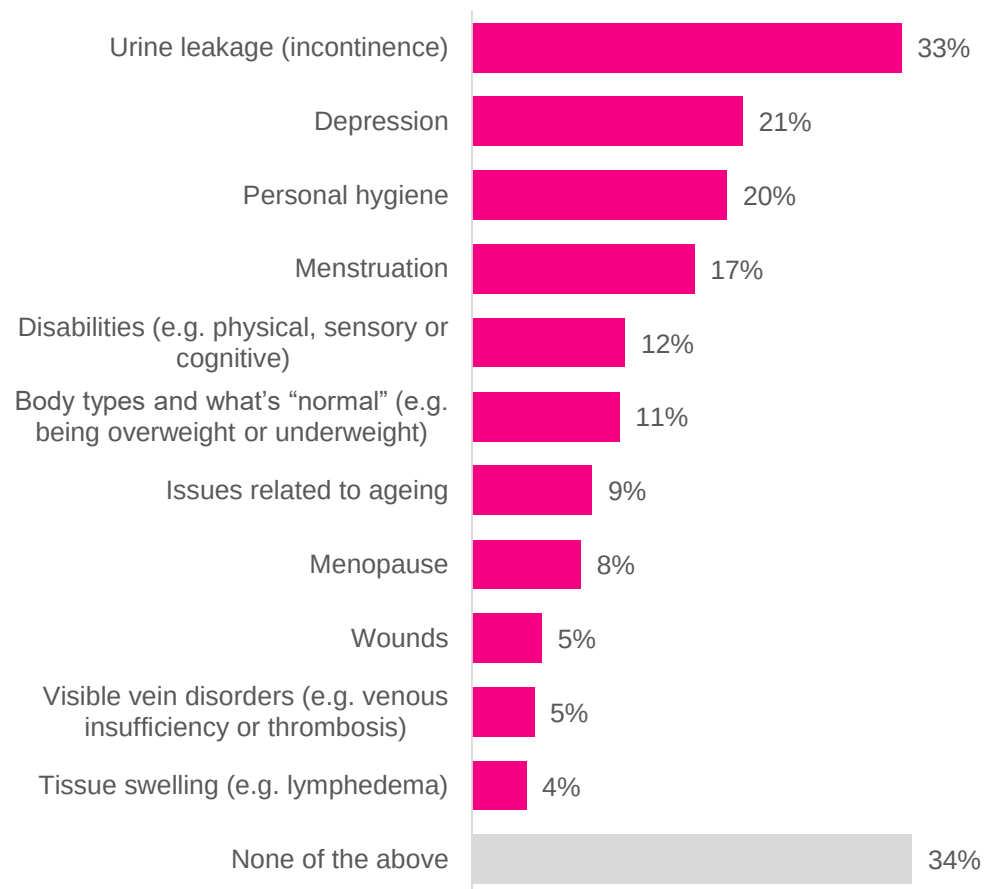


General Health Stigmas

1 in 5

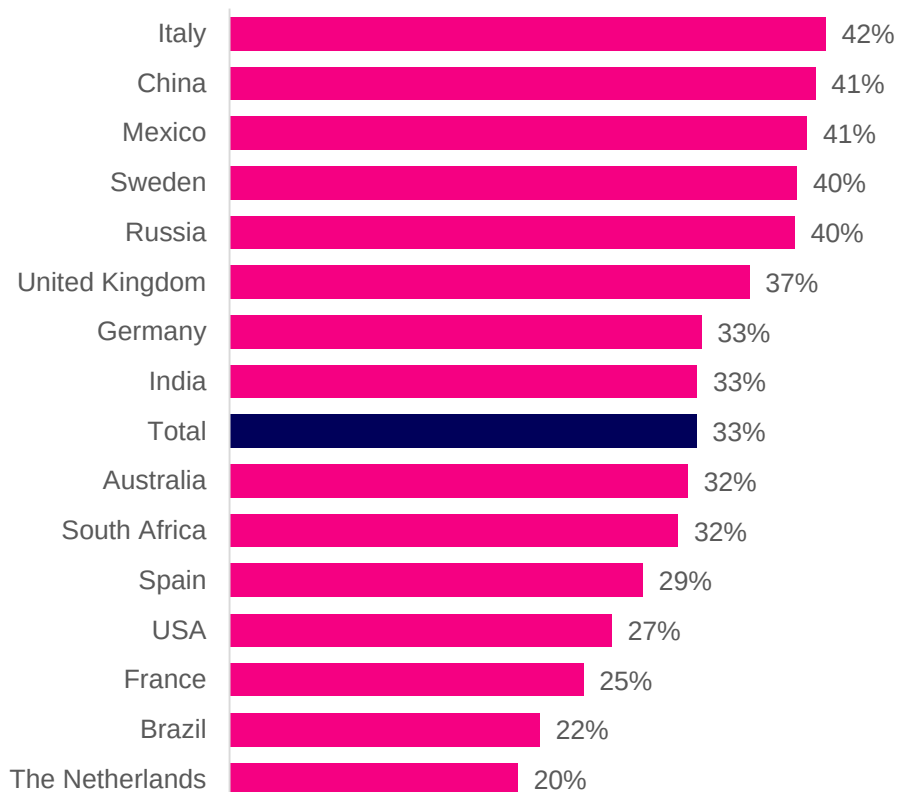
feel uncomfortable discussing personal hygiene with other people

Incontinence is even more difficult to discuss than depression

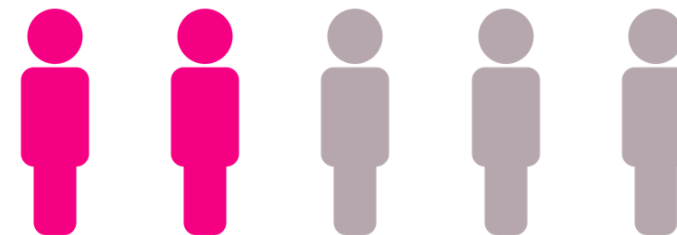


Incontinence is twice as stigmatized in Italy compared to the Netherlands

Feel uncomfortable discussing urine leakage (incontinence)



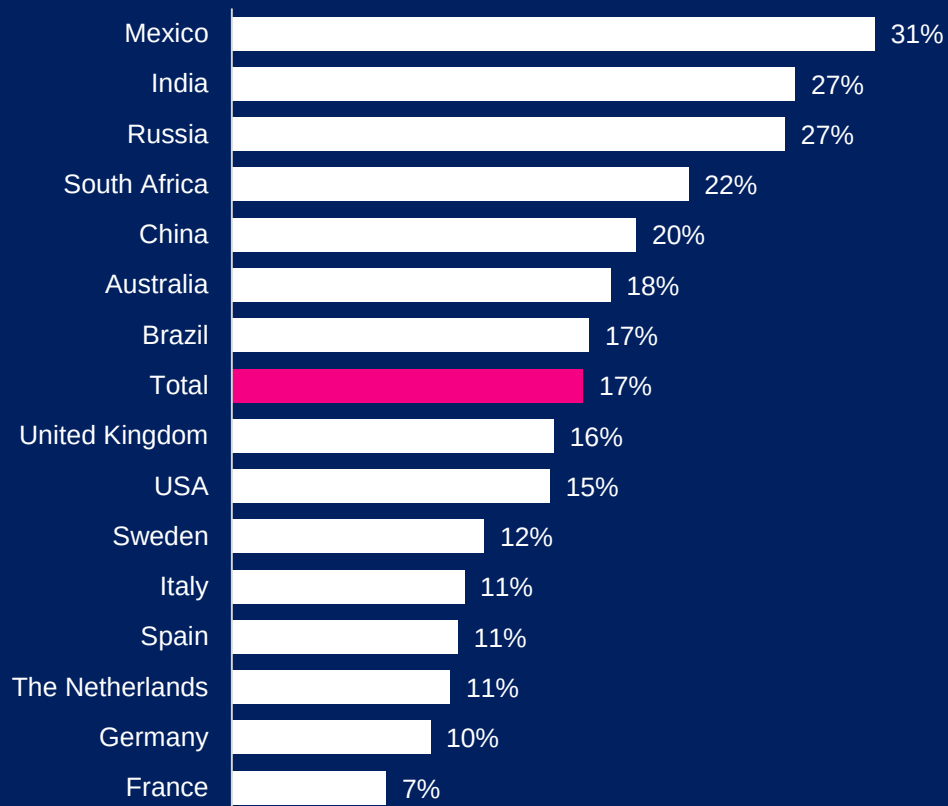
In some markets, as many as 2 in 5 are uncomfortable discussing incontinence



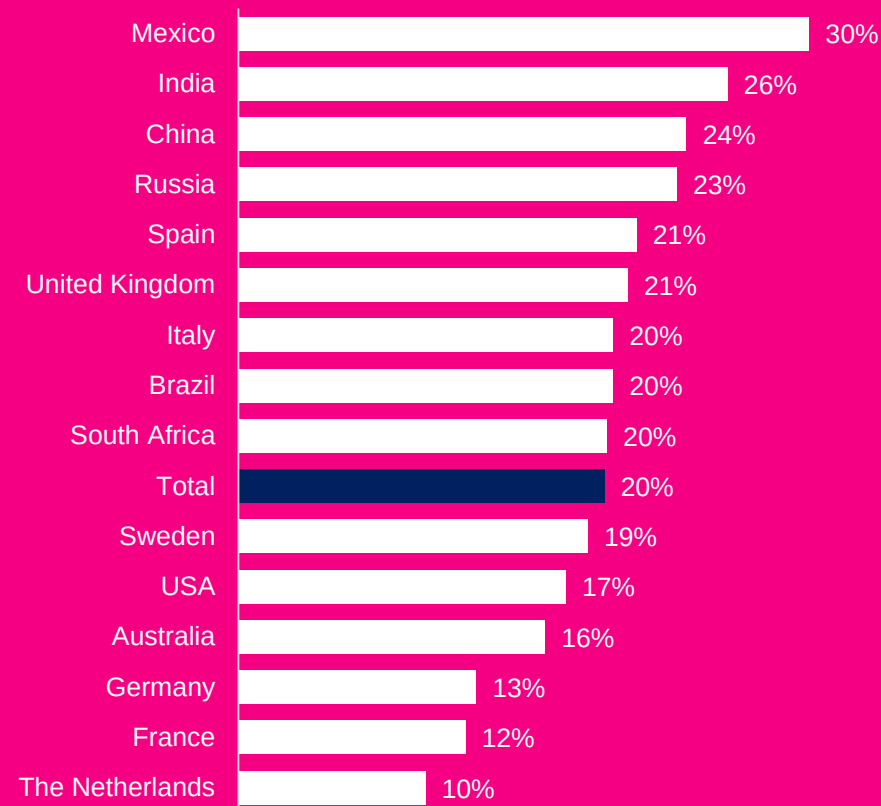
- In Italy, China, Mexico, Sweden and Russia every **2 in 5** are uncomfortable discussing incontinence.
- In the Netherlands, the country with the lowest share, having issues with incontinence is still a stigma for **1 in 5**.

In most markets, it is equally difficult to discuss personal hygiene as menstruation

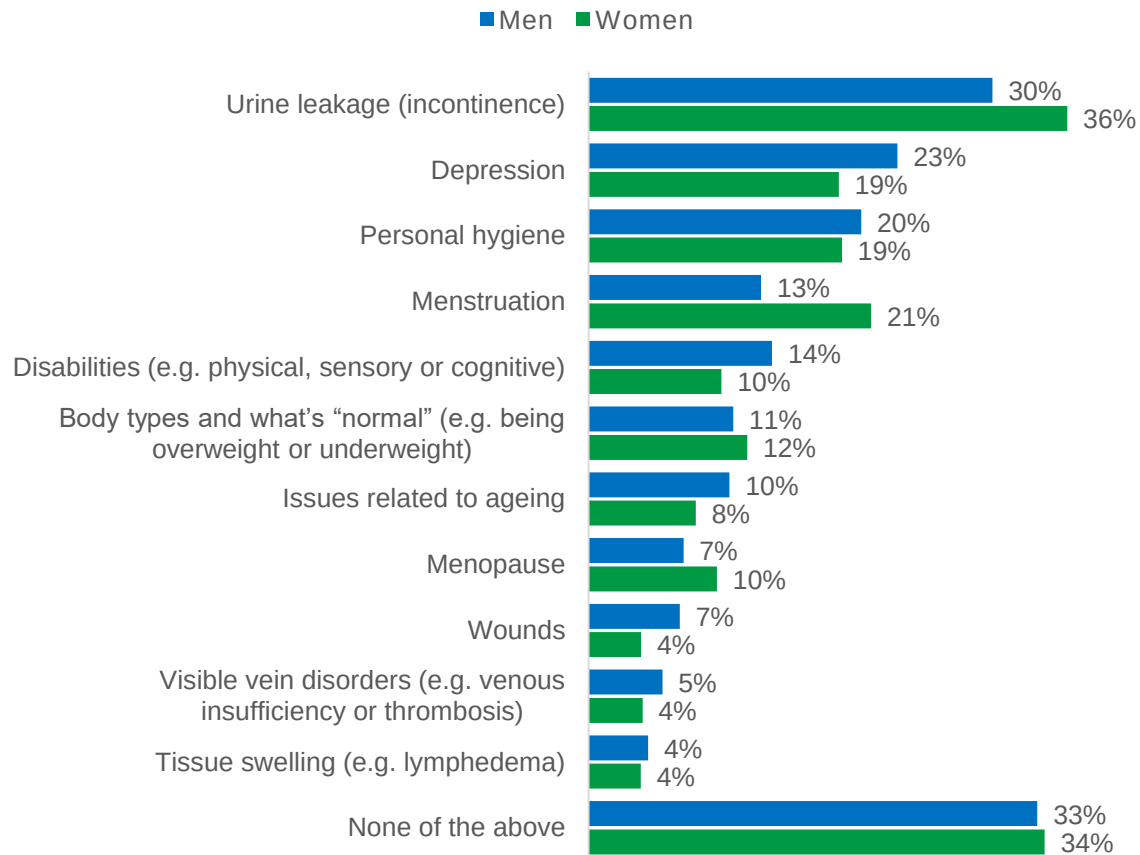
Menstruation



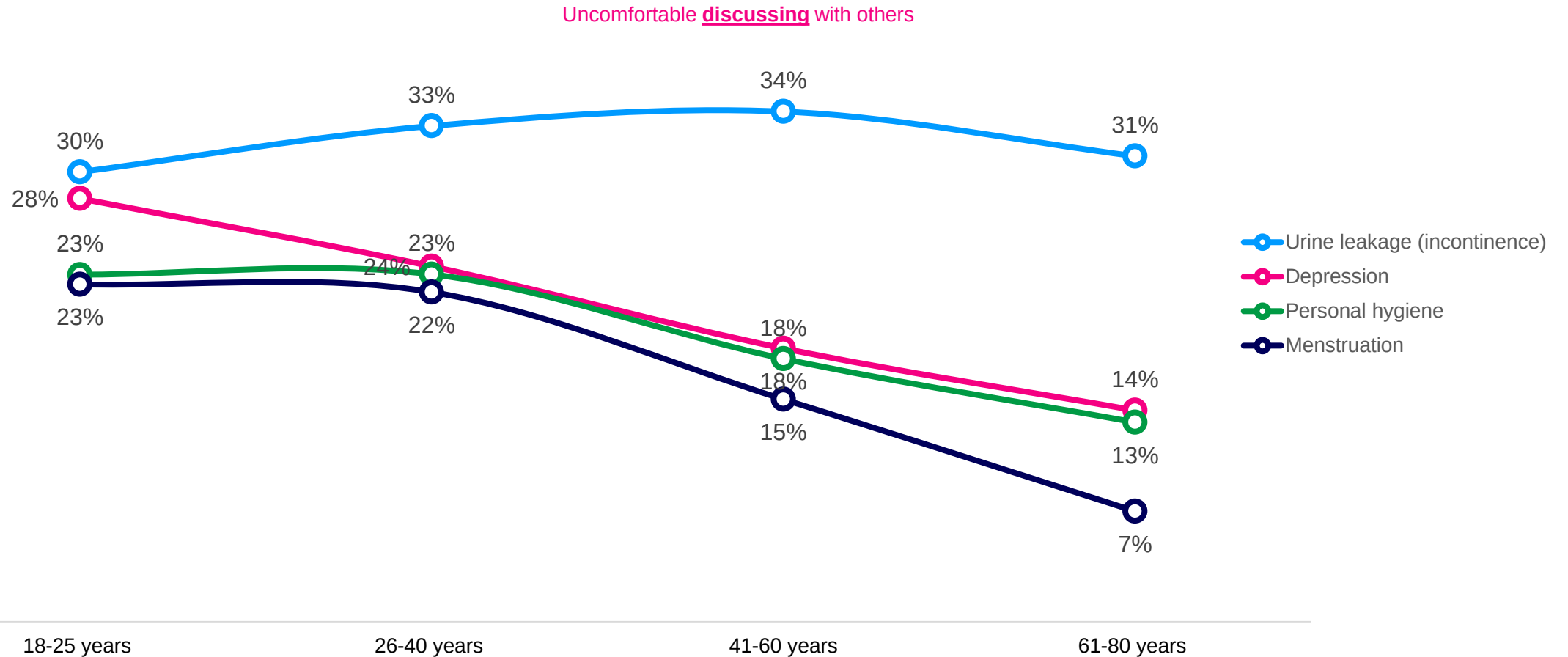
Personal hygiene



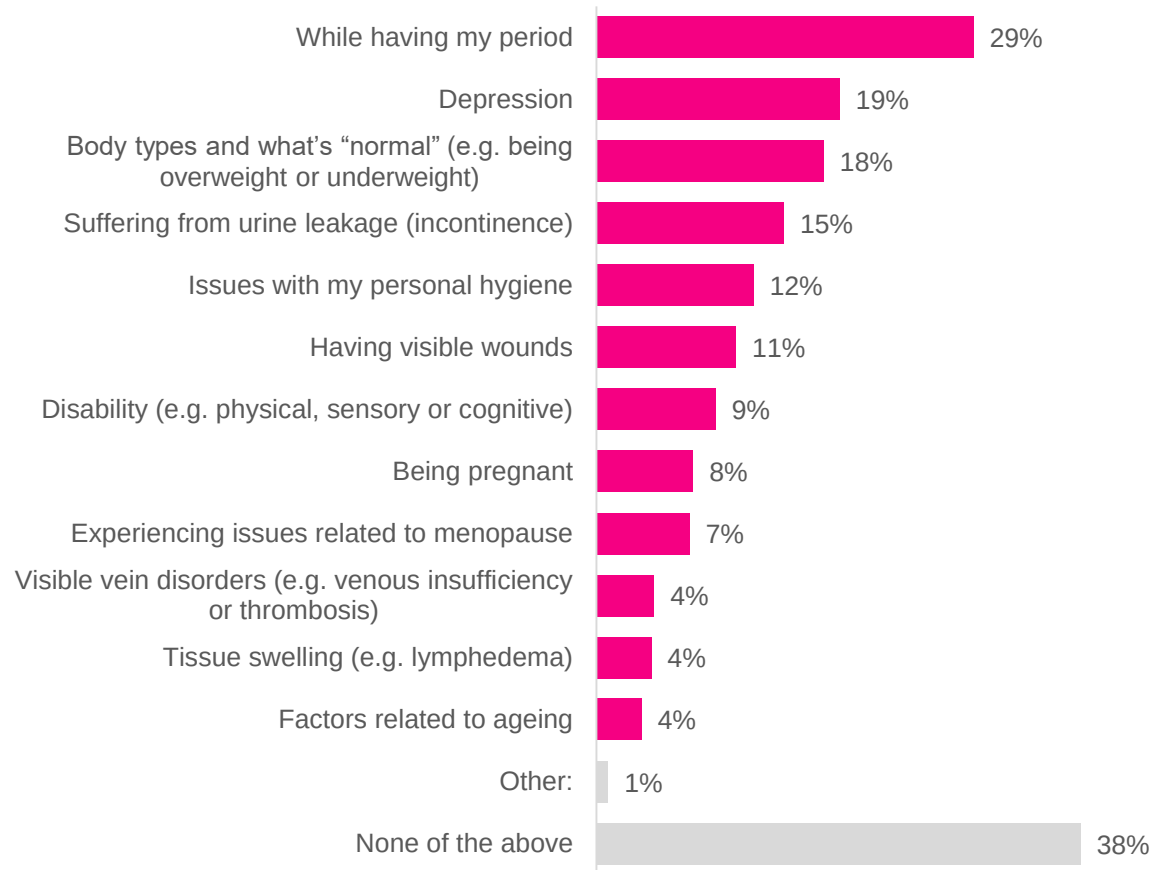
Women are more uncomfortable discussing incontinence than men



Perceived stigmatization reduces with age – except for incontinence



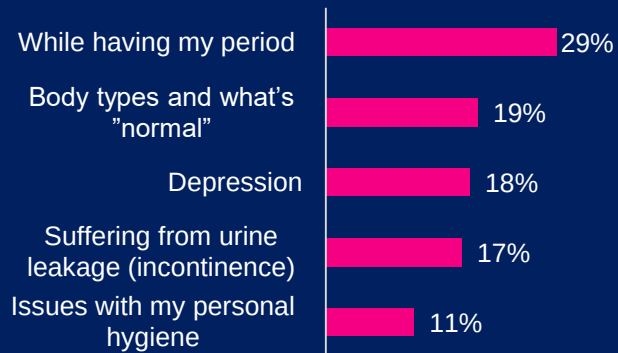
1 in 3 women have felt uncomfortable participating in social activities while having their period



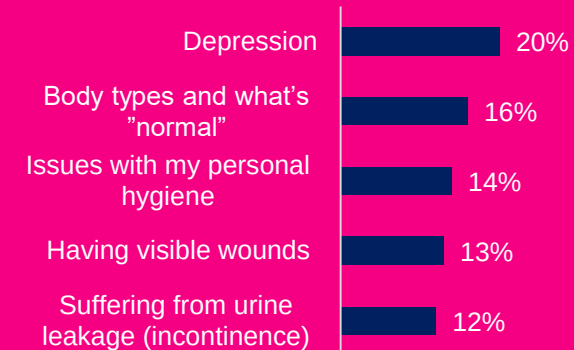
Women are most likely to refrain from everyday social activities during their period, men due to depression



TOP FEMALE RESULTS

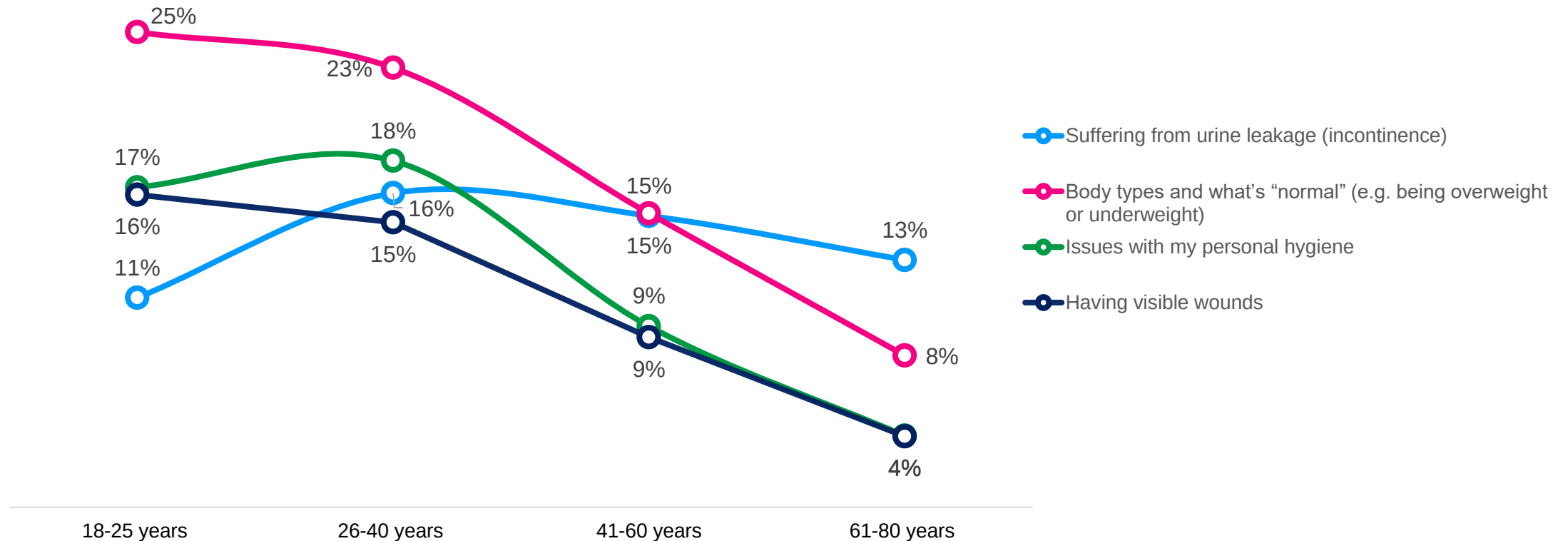


TOP MALE RESULTS



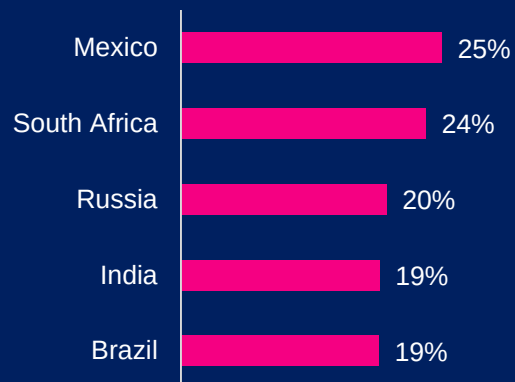
Embarrassment due to bodily functions or health issues reduces with age – except for incontinence

Uncomfortable participating in everyday social activities due to:

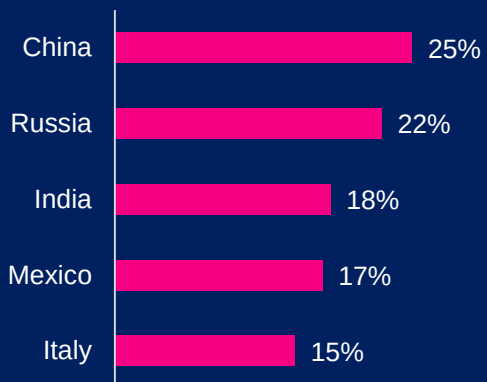


Top 5 countries per stigma

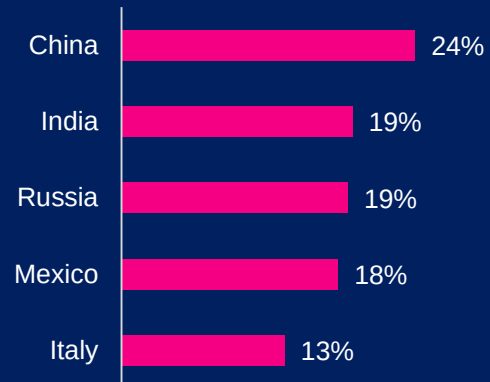
While having my period



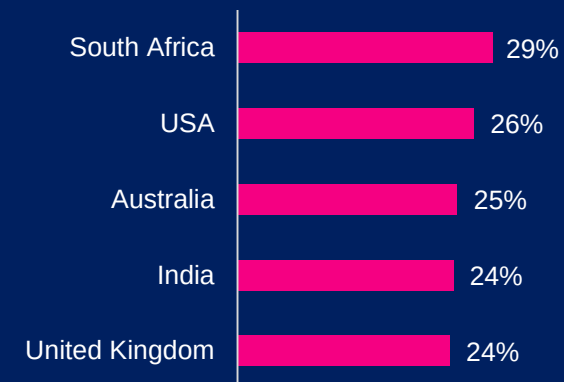
Suffering from urine leakage (incontinence)



Issues with my personal hygiene

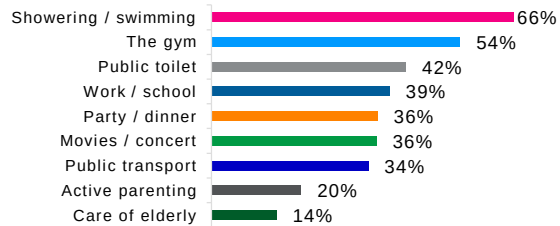


Depression

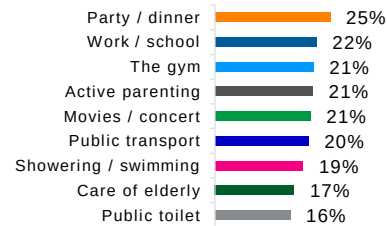


Insecurities due to social stigmas exclude many from everyday social activities

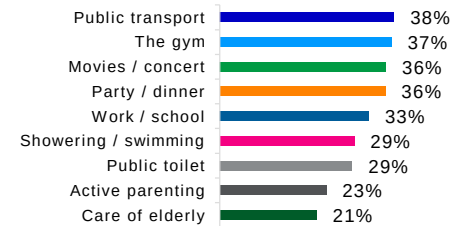
While having period



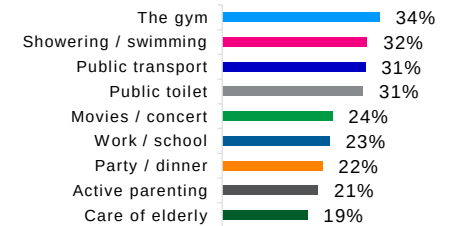
Menopause



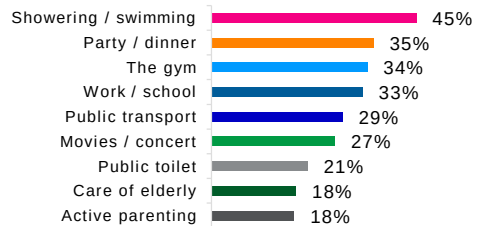
Incontinence



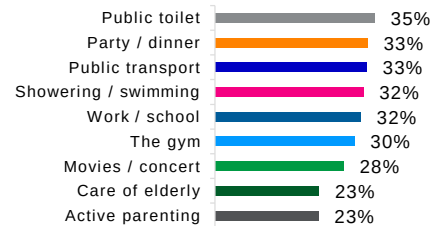
Pregnancy



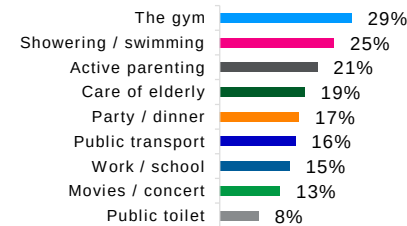
Visible wounds



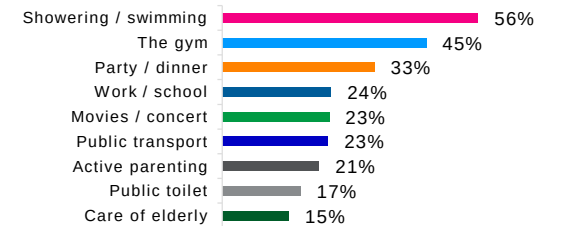
Personal hygiene



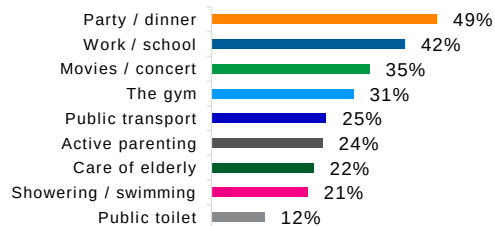
Ageing



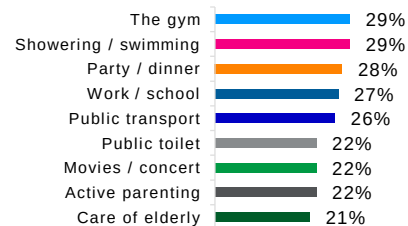
Body type / normality



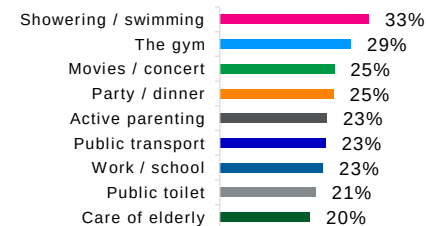
Depression



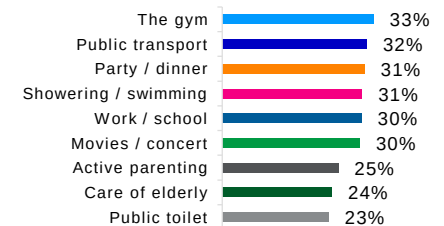
Tissue swelling



Visible vein disorders

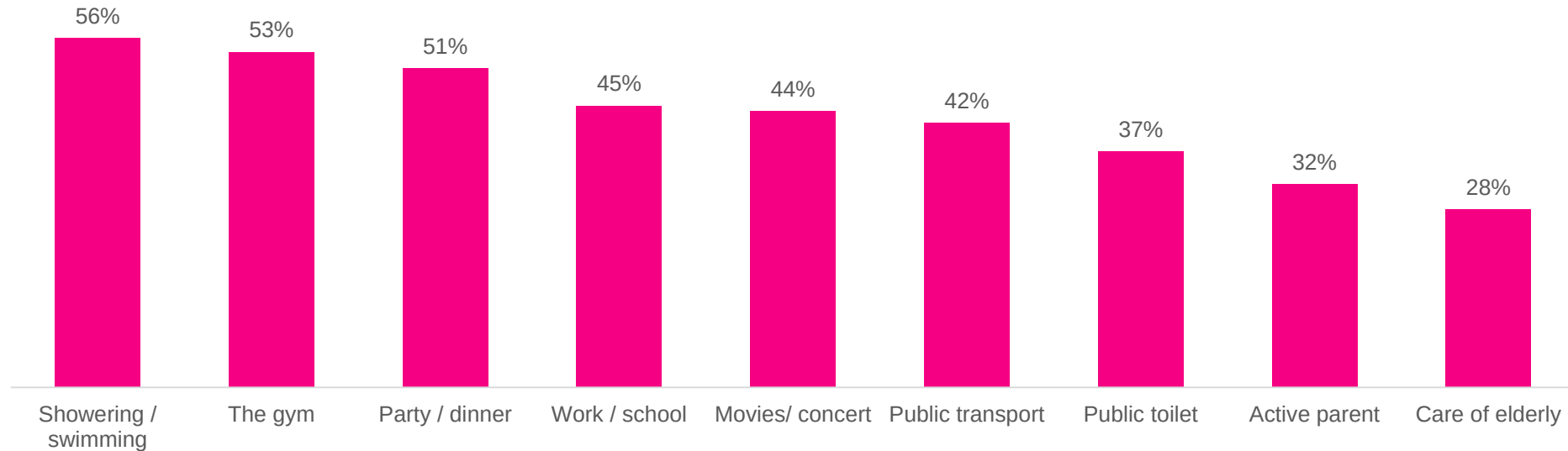


Disability



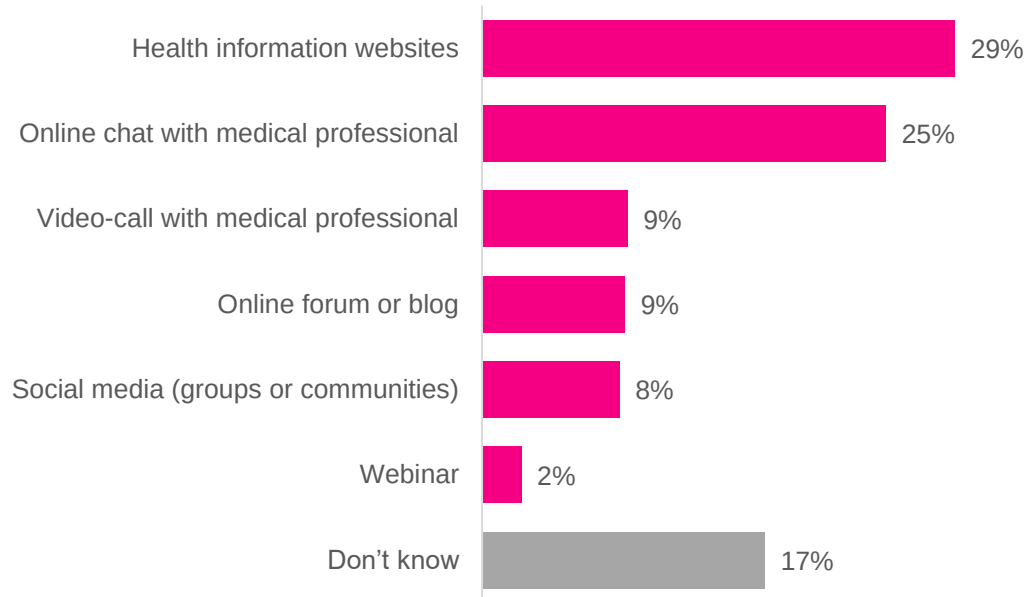
Public pools and gyms are the worst places to be for people affected by stigmatization

Base: Have felt too embarrassed or uncomfortable to participate in everyday social activities

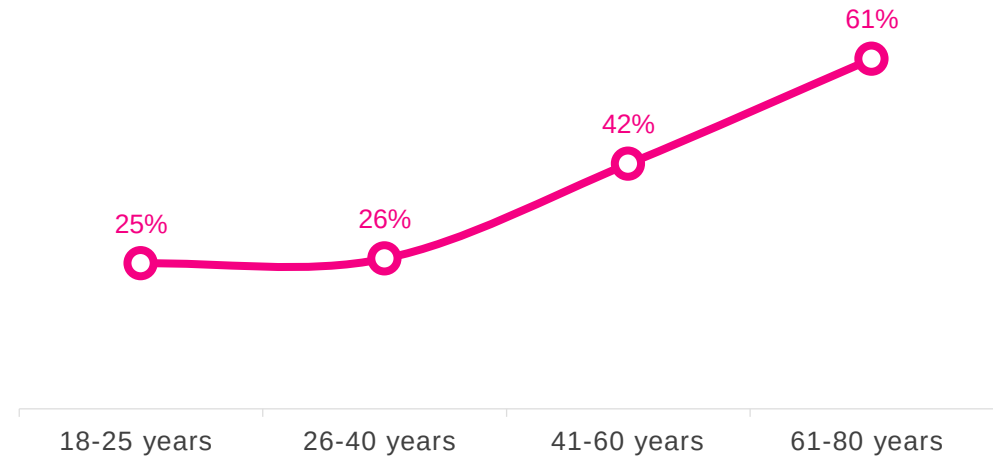


Older people are more open to seek help in-person for stigmatized conditions

Base: Would feel uncomfortable seeking help in person for stigmatized conditions

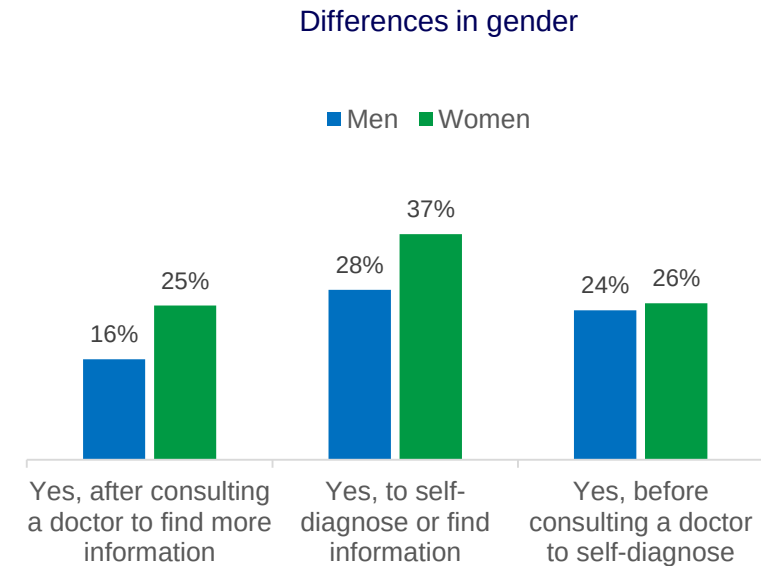
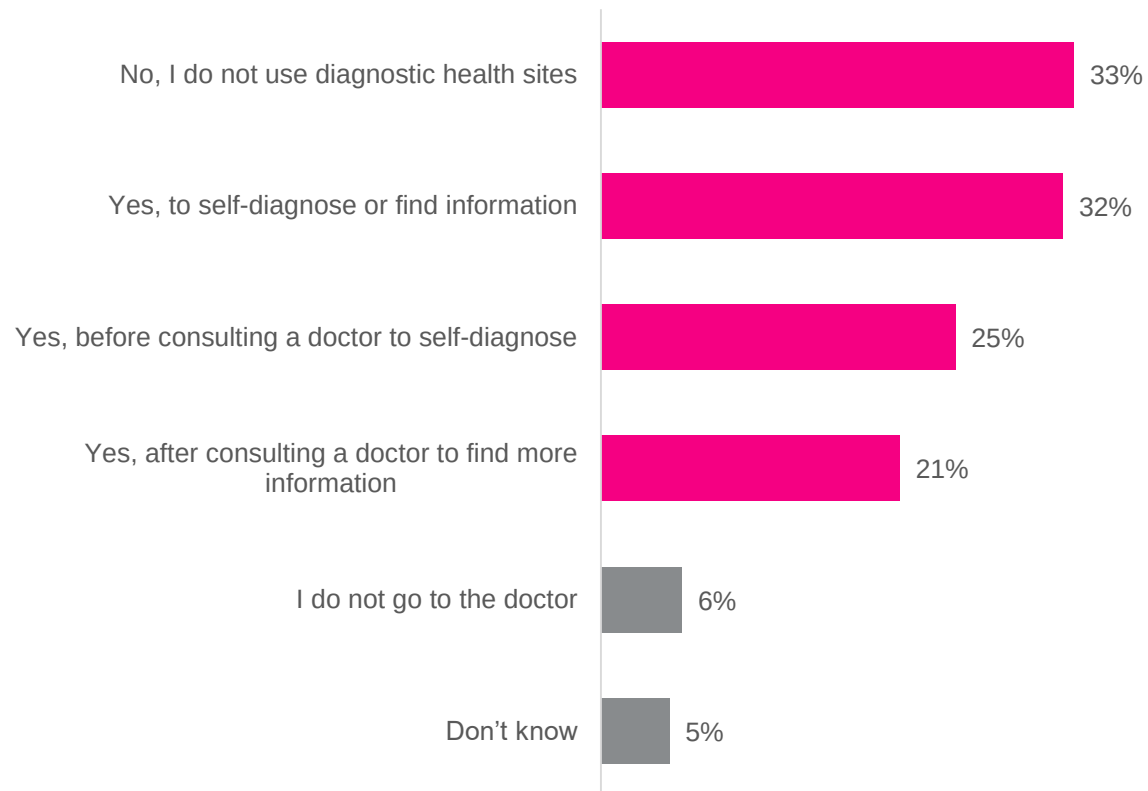


Base: Would feel comfortable seeking help in-person for stigmatized conditions

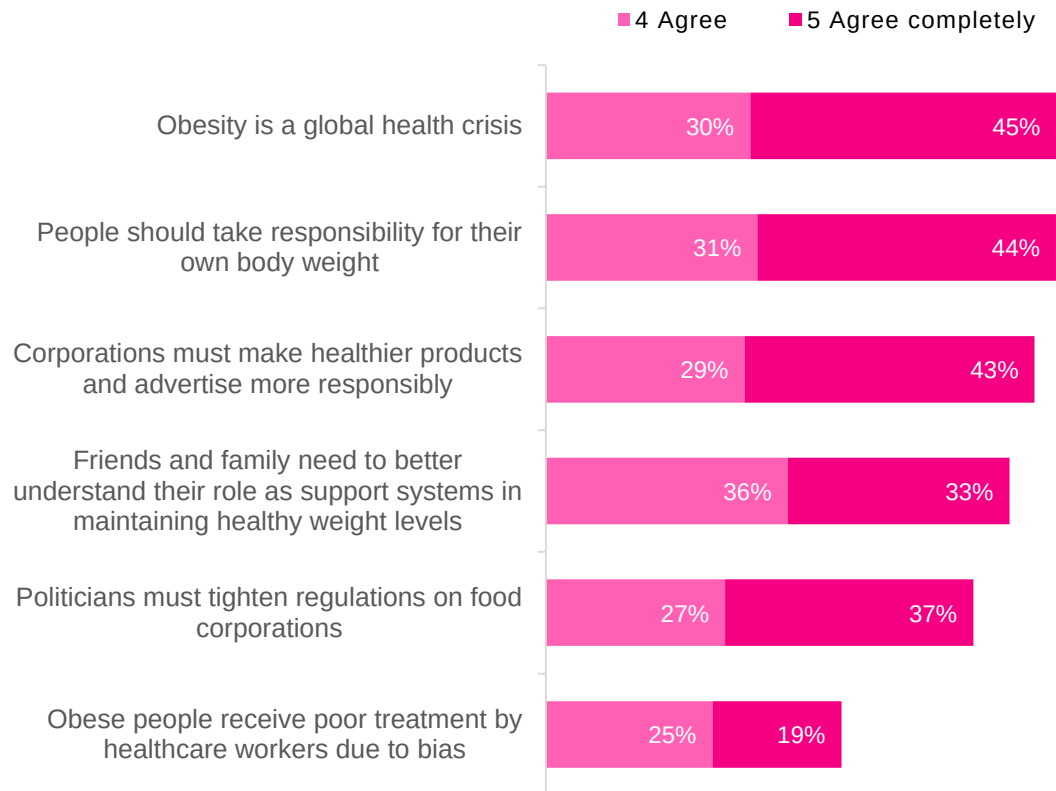


1 in 3 uses a diagnostic health site to self-diagnose or find information in the US

USA



3 in 4 agree that obesity is a global health crisis



Medical research insight

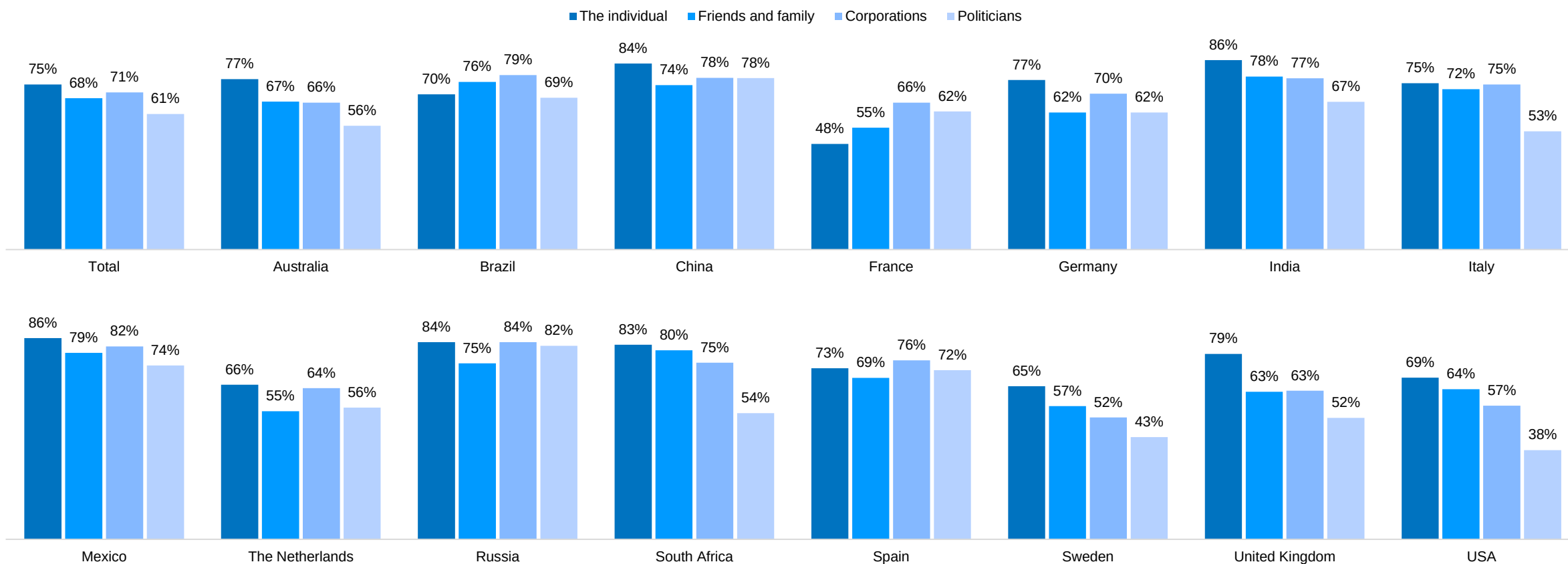
Up to **3x**

greater risk of venous thrombosis due to obesity and 20% - 70% higher risk of experiencing urinary incontinence for each 5-unit increase in BMI.

Source: American Journal of Medicine, Journal of Urology

Most markets say that individuals should take responsibility for their body weight

Should take responsibility for obesity



Incontinence

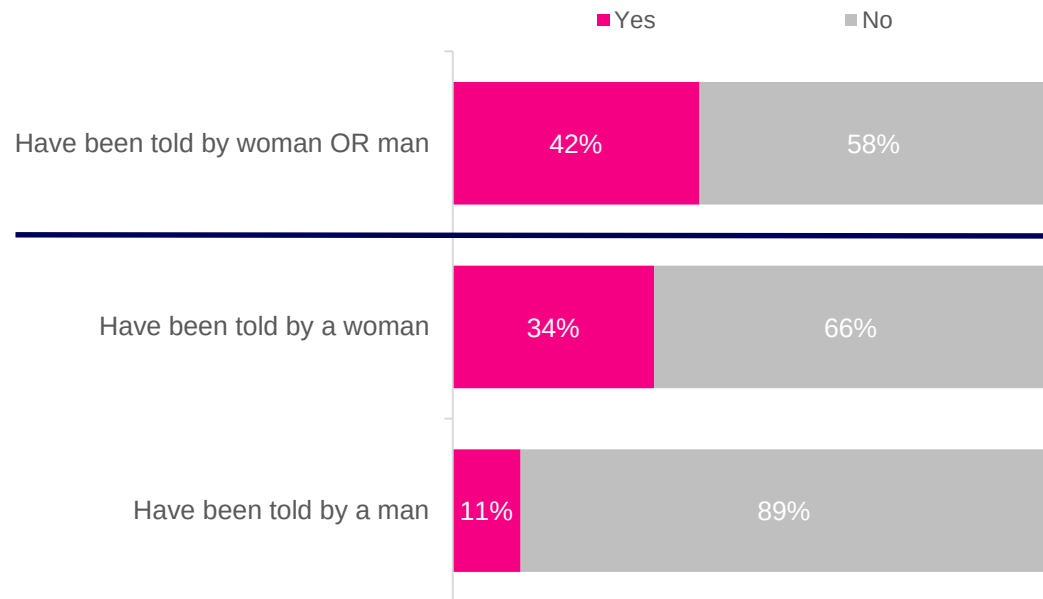


4x

more common in Spain to have been told by a woman
than a man that they are suffering from urine leakage

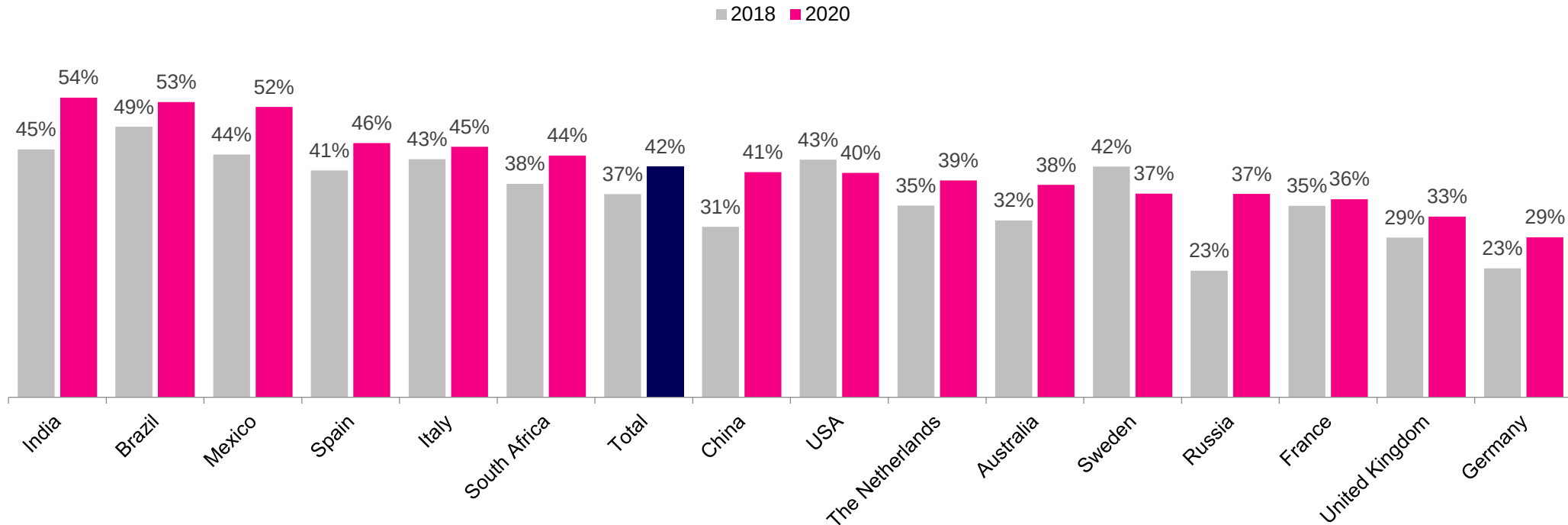
2 in 5 have had people tell them about their incontinence

2018



Overall, people are more open to tell others about experiencing urine leakage than in 2018

2018



Share that has been told by someone that they have had or are currently having urine leakage

Women are still much more likely to tell others they have urine leakage

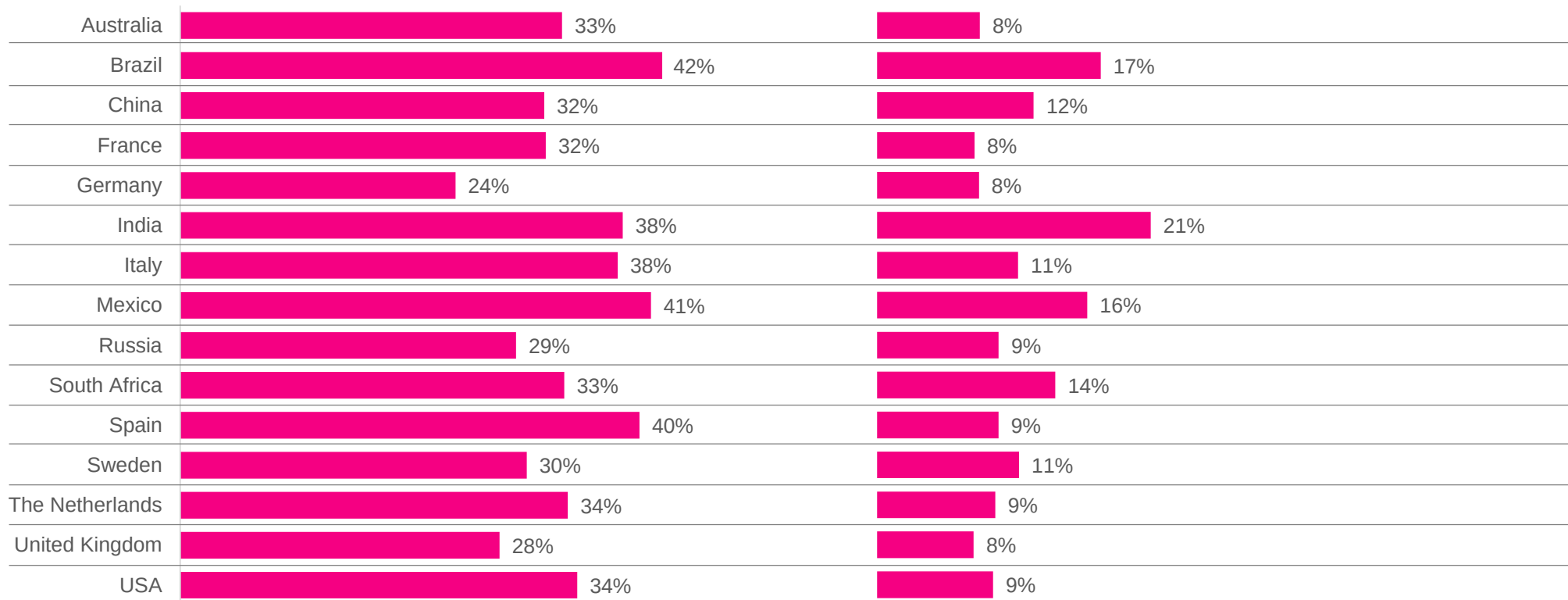
2018

Share that has been told by a woman that they have had or are currently having urine leakage

GLOBAL AVG.: 34% (2018: 30%)

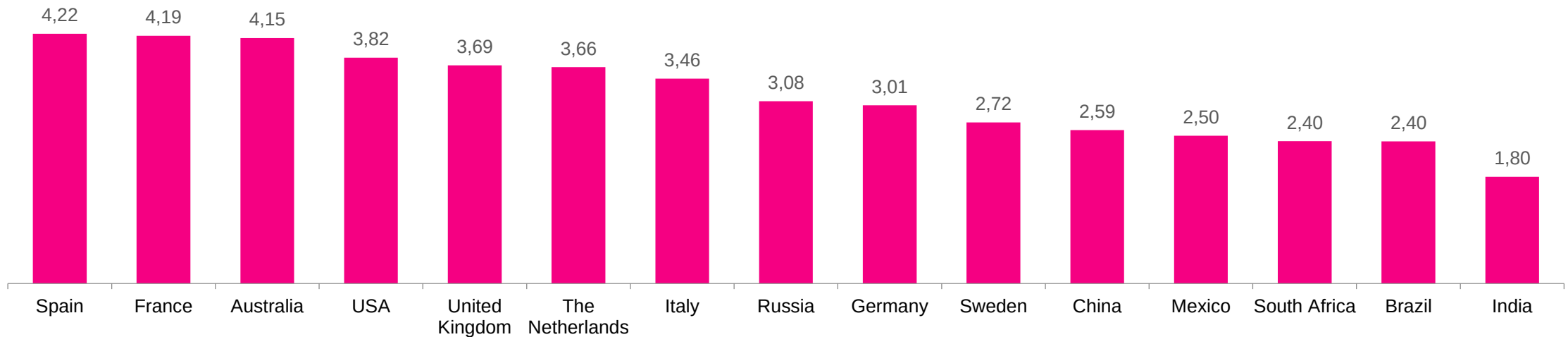
Share that has been told by a man that they have had or are currently having urine leakage

GLOBAL AVG.: 11% (2018: 10%)



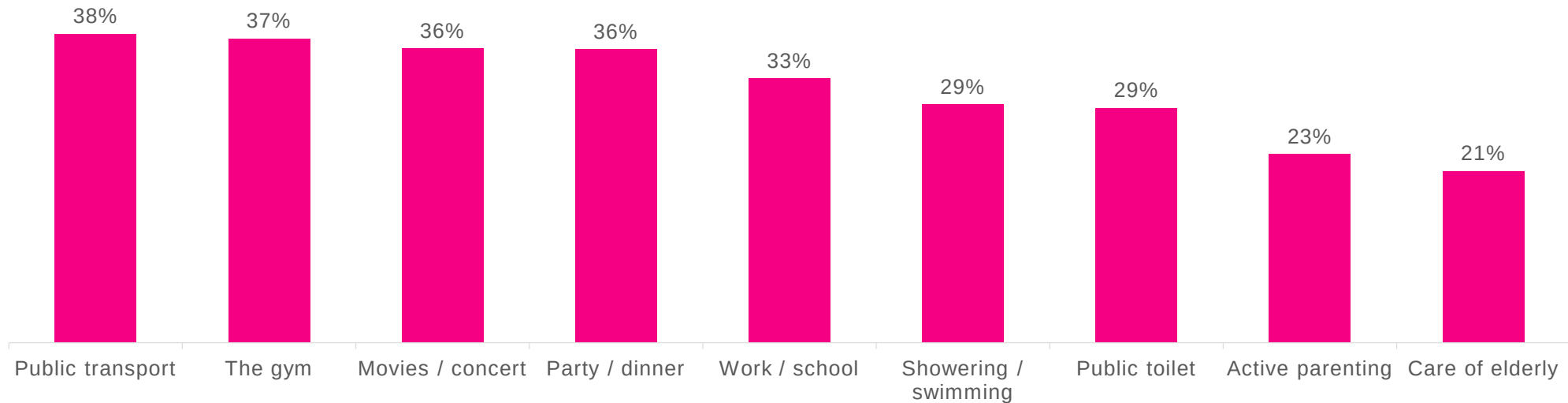
Four times more likely in Spain to have been told by a woman than a man that they have urine leakage

Difference between having been told by a woman than a man that they have urine leakage

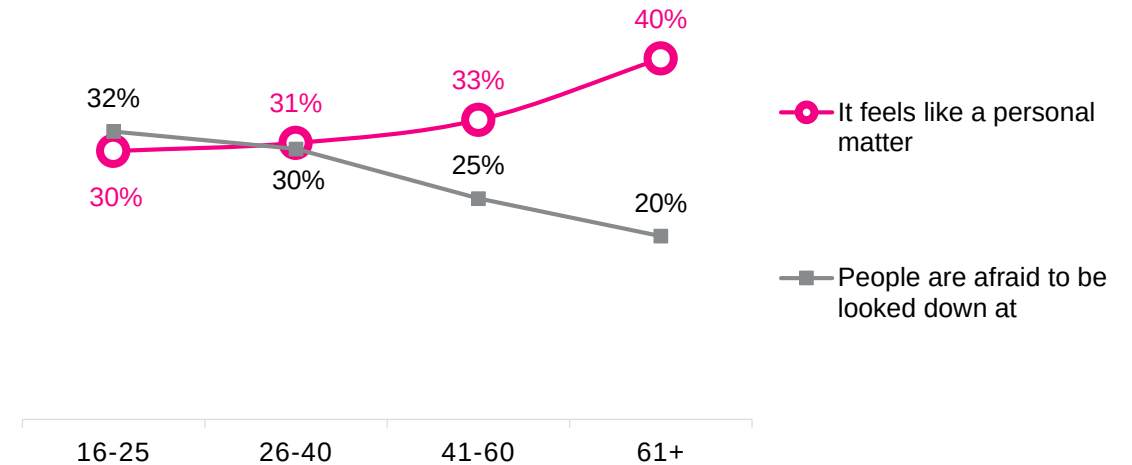
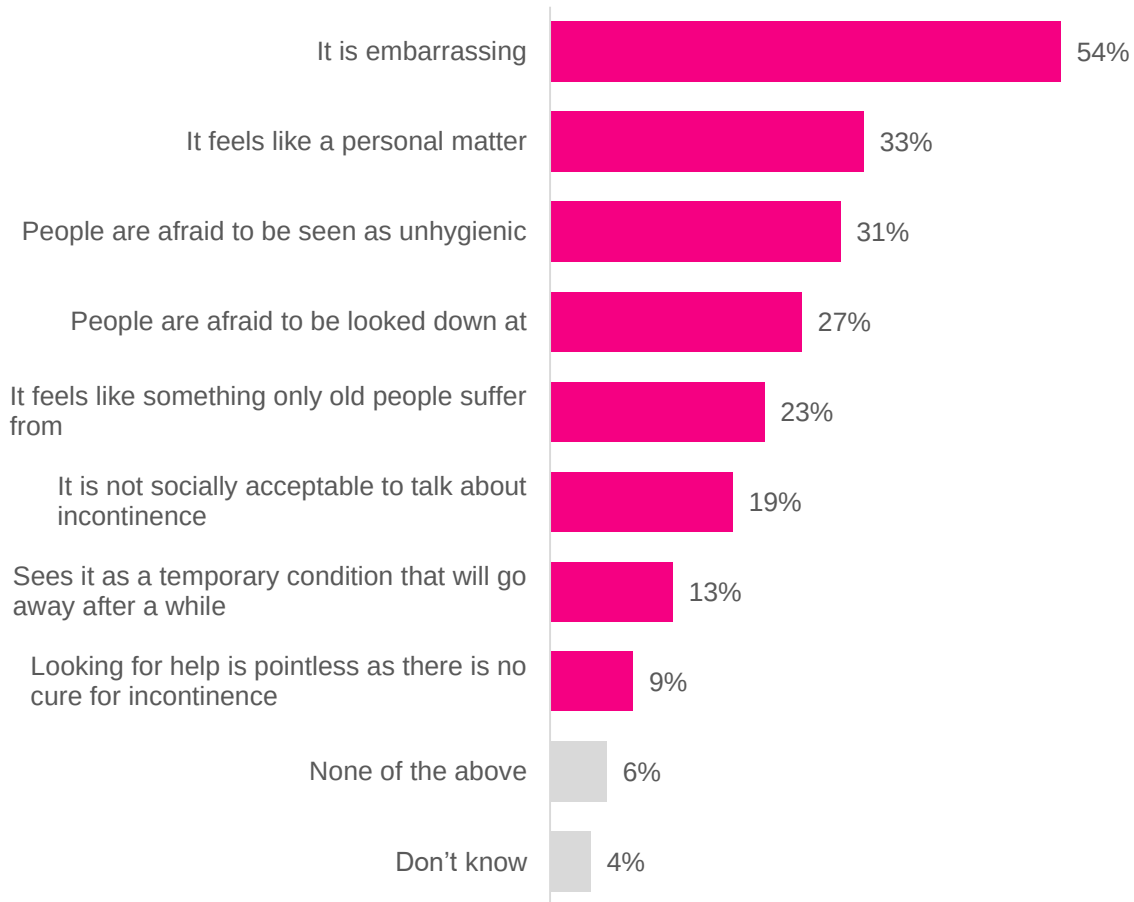


4 in 10 with incontinence have refrained from using public transportation

Base: Have felt too embarrassed or uncomfortable to participate in everyday social activities due to matters connected to incontinence

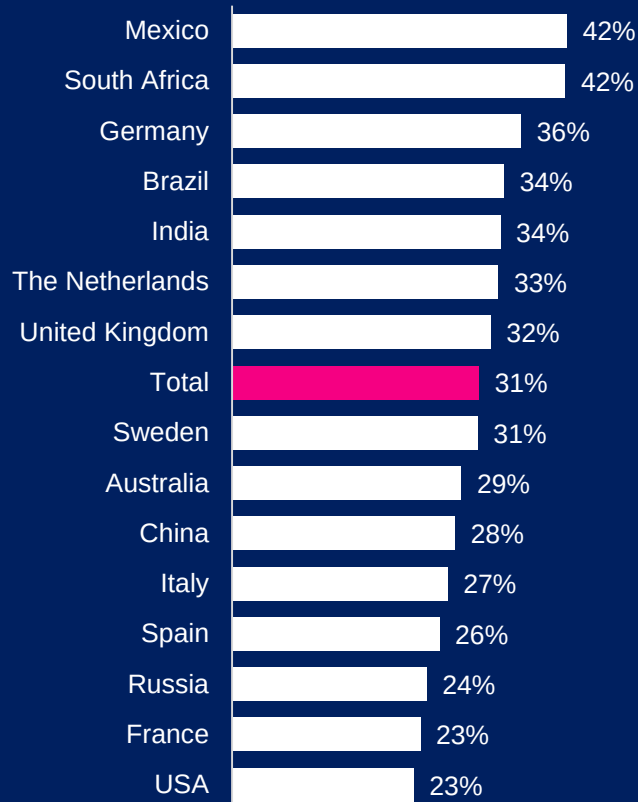


Embarrassment is thought to be the most common reason for not seeking help and support for incontinence

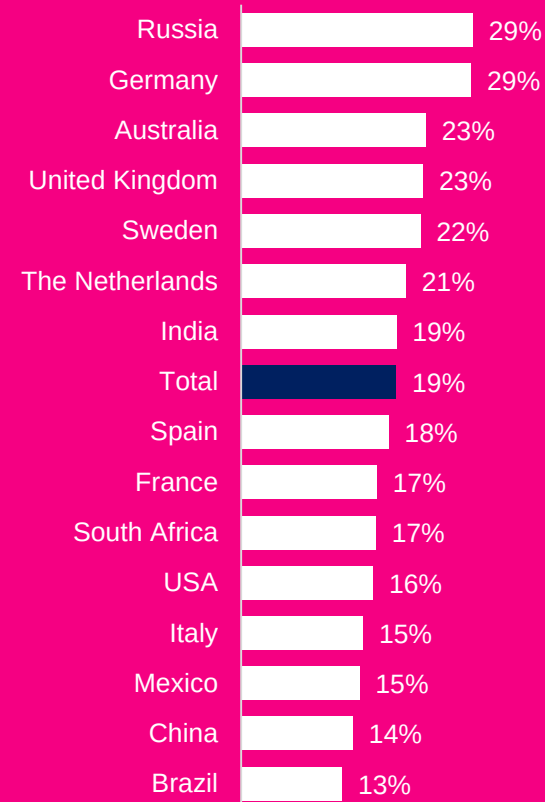


Issues related to hygiene and social stigmatization need to be addressed across all markets

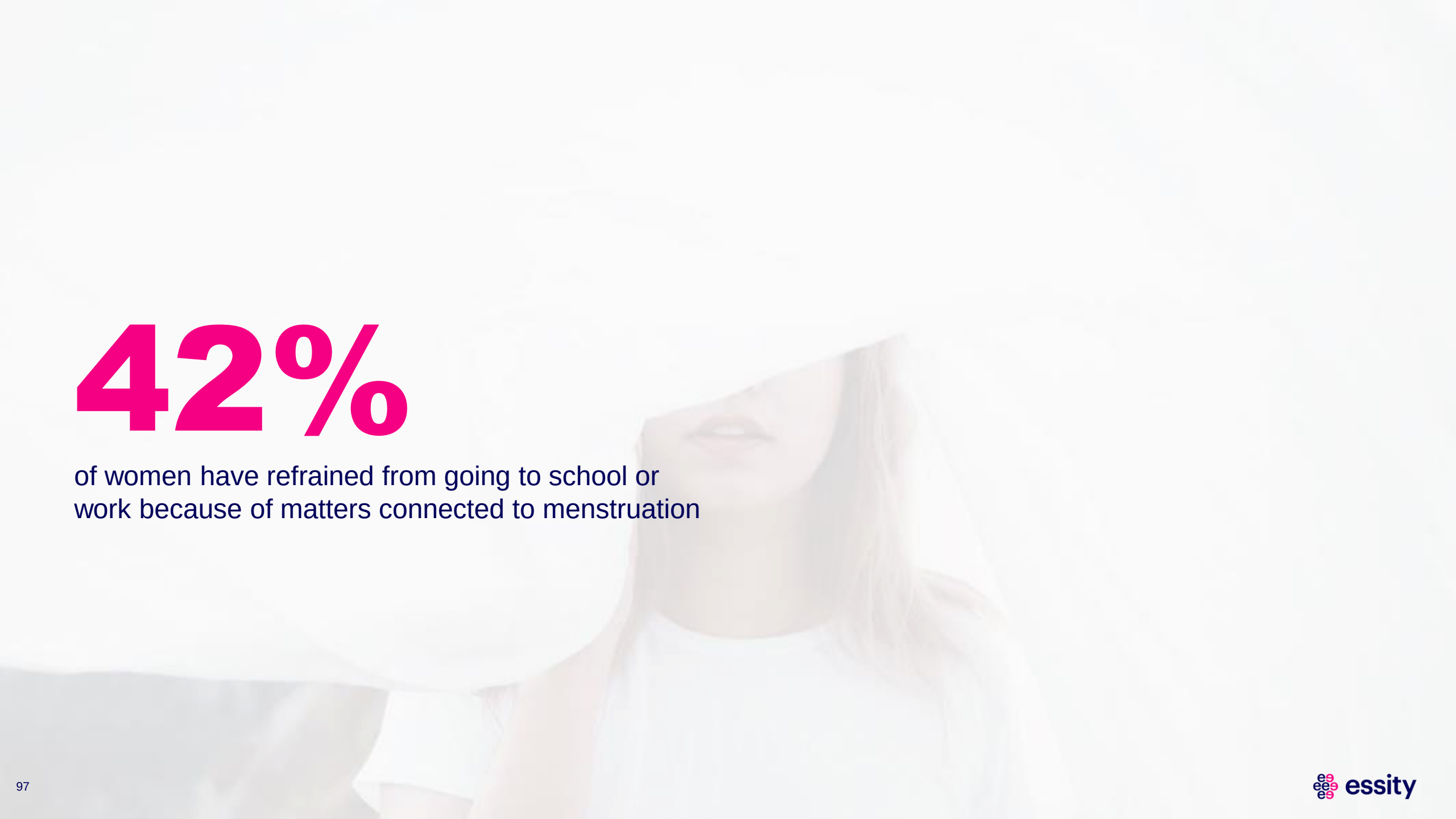
People are afraid to be seen as unhygienic



It is not socially acceptable to talk about incontinence



Menstruation

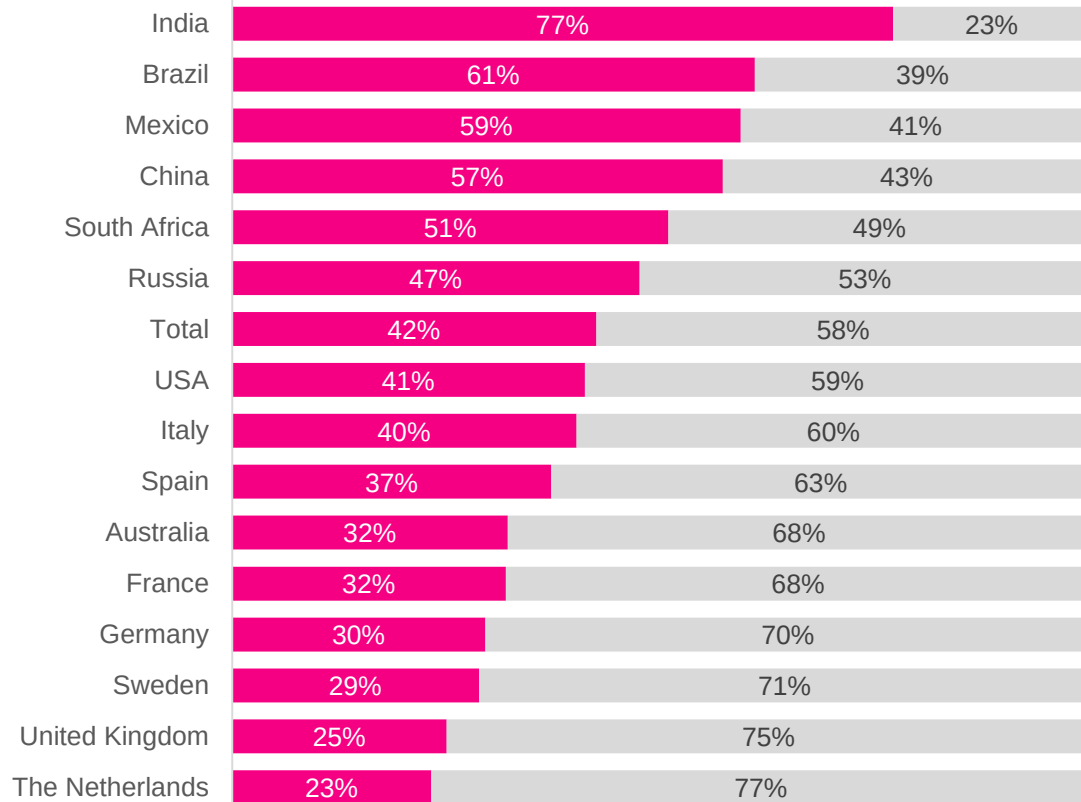


42%

of women have refrained from going to school or work because of matters connected to menstruation

2 out of 5 women have refrained from going to school or work the last year due to menstruation

Have refrained from going to school/work this last year because of matters connected to menstruation

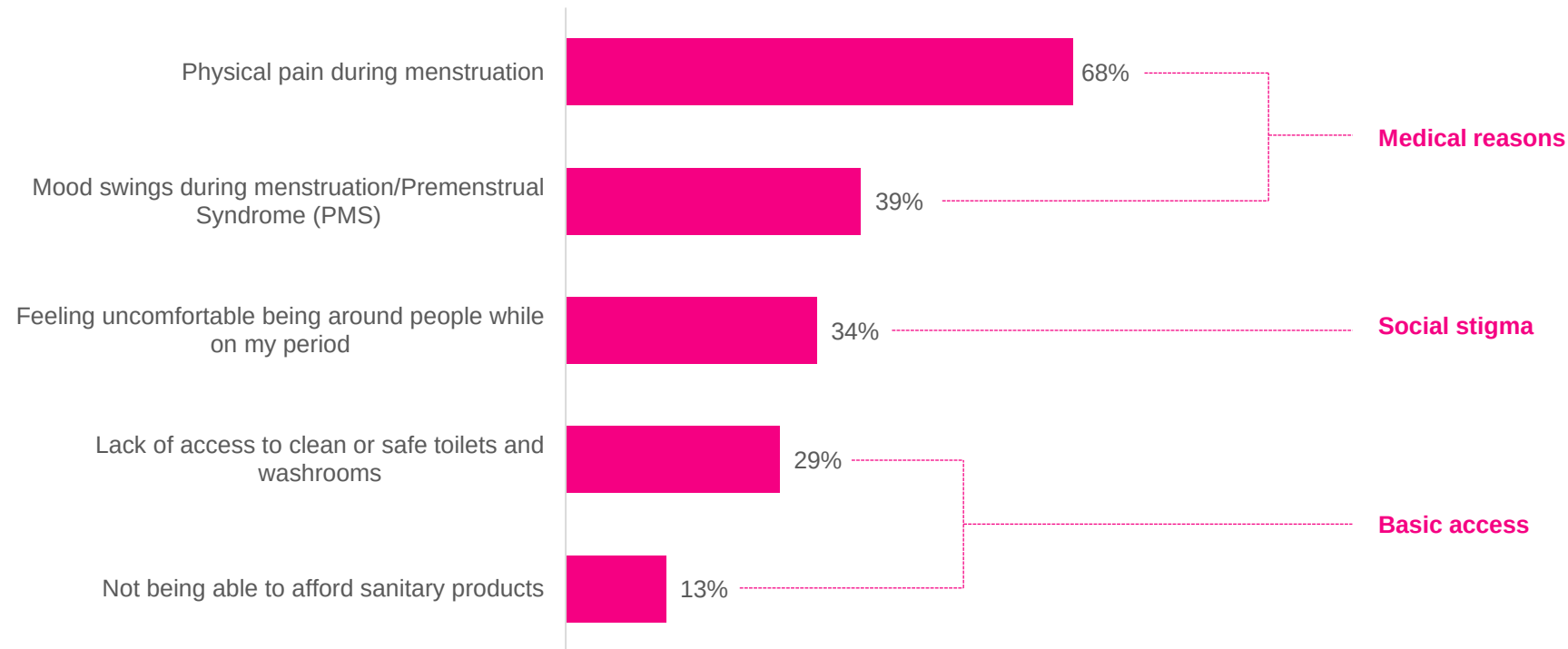


42%

have refrained from going to school/work because of matters connected to menstruation

3 in 10 of those who have refrained from going to school or work lack access to clean or safe toilets

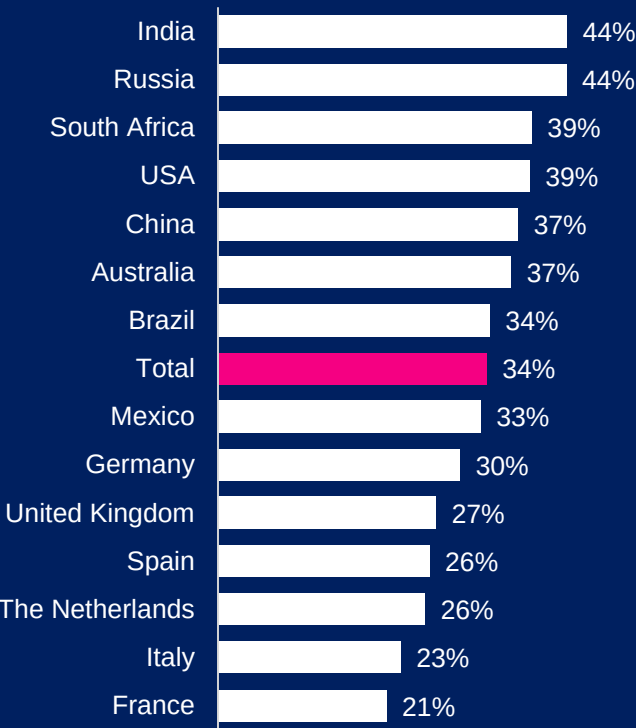
Base: Have refrained from going to work/school this last year because of matters connected to menstruation



Lack of access to feminine care products and stigmatization still result in lots of lost work and school days for women

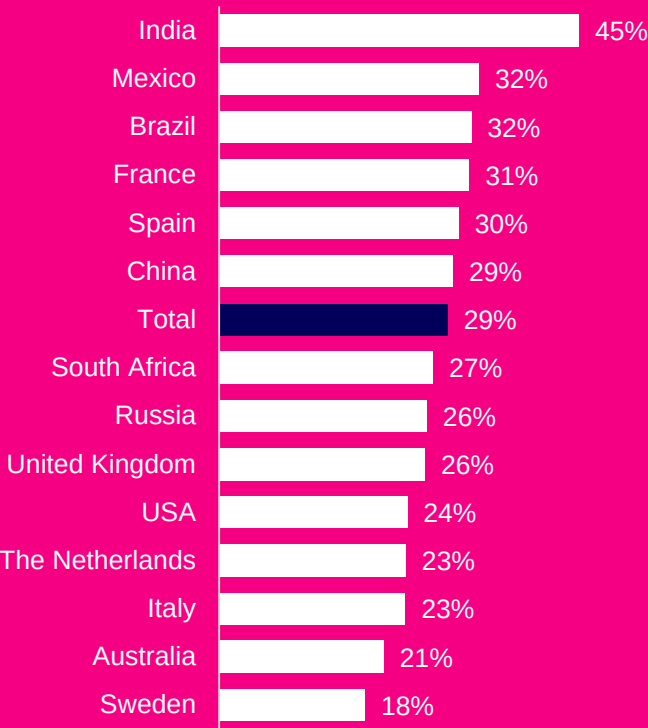
Social stigma

Feeling uncomfortable being around people while on my period



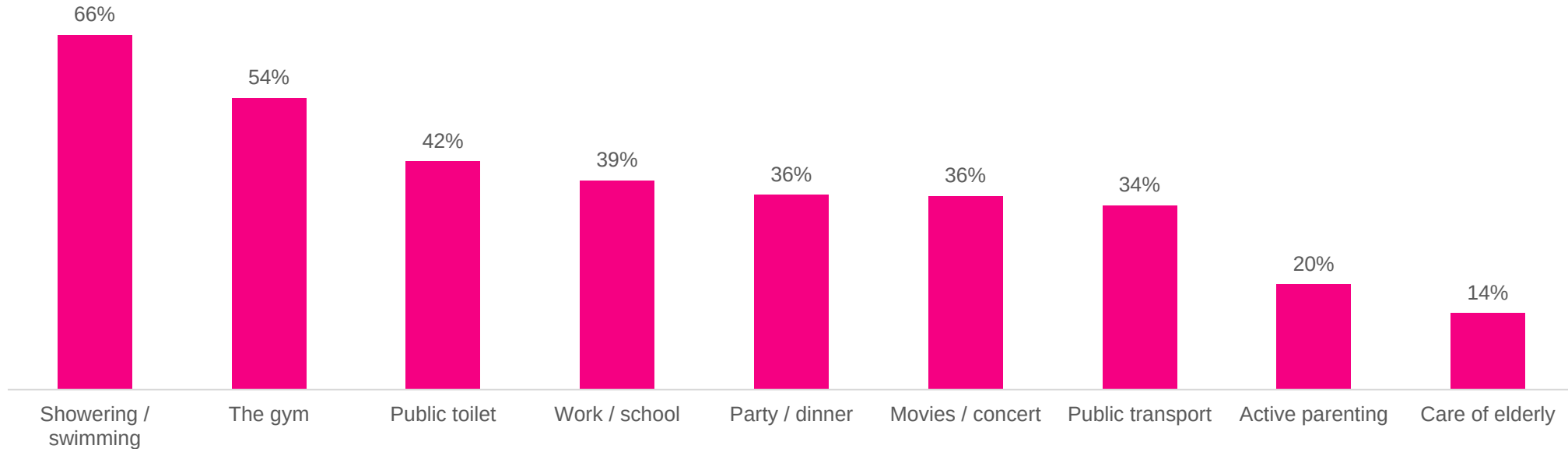
Basic access

Lack of access to clean or safe toilets and washrooms

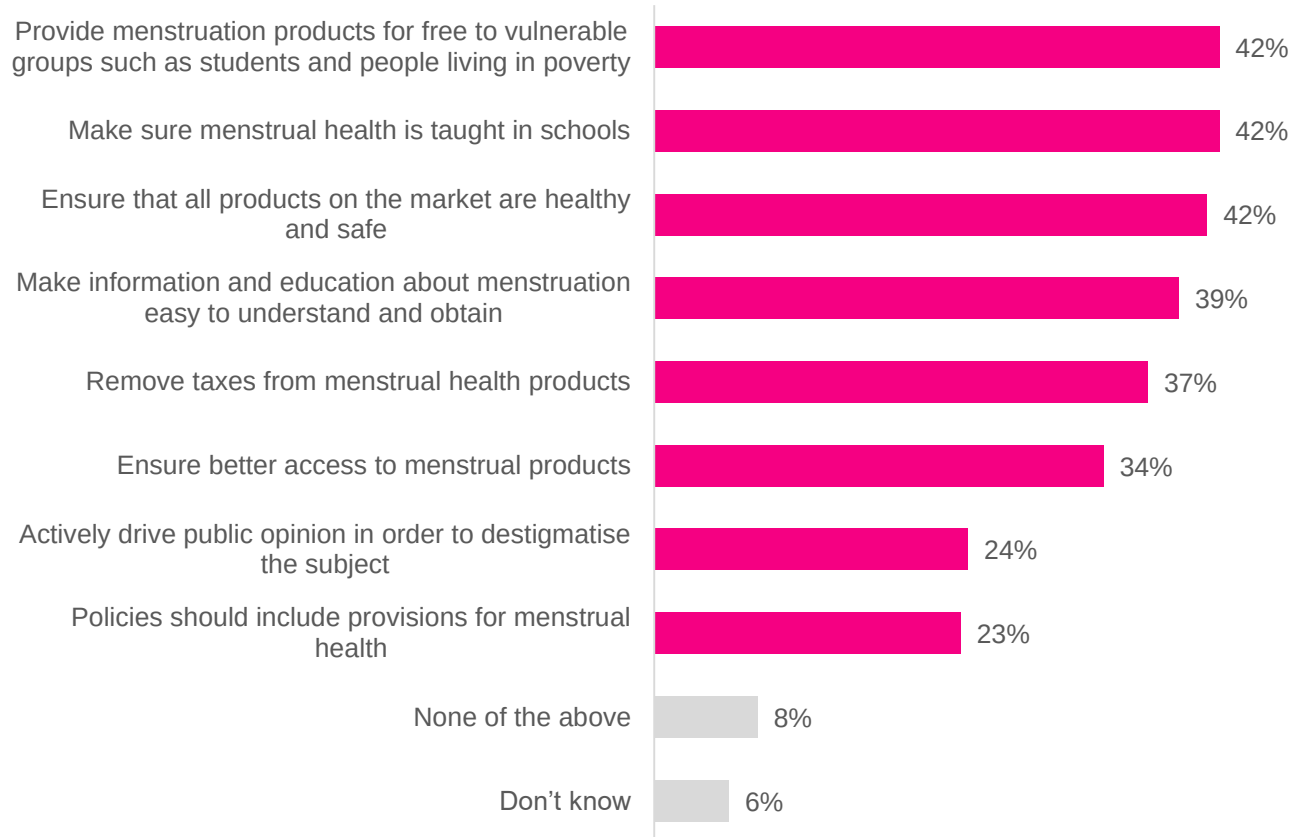


Women who refrain from participating in social activities due to menstruation often avoid everyday environments

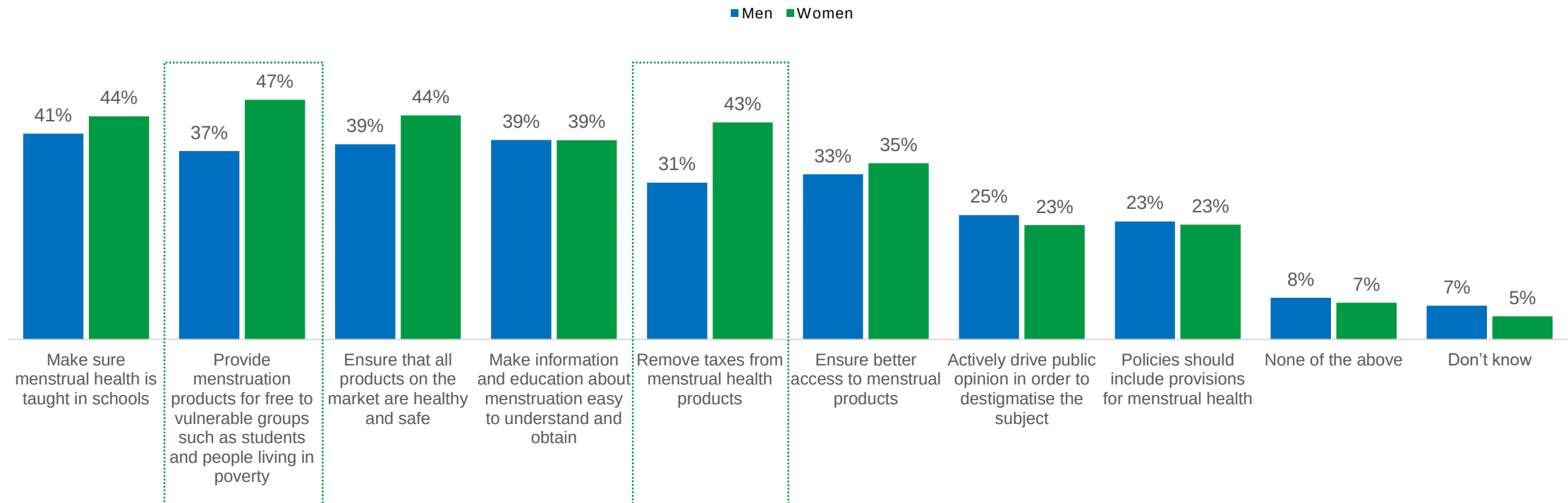
Base: Have felt too embarrassed or uncomfortable to participate in everyday social activities due to matters connected to menstruation



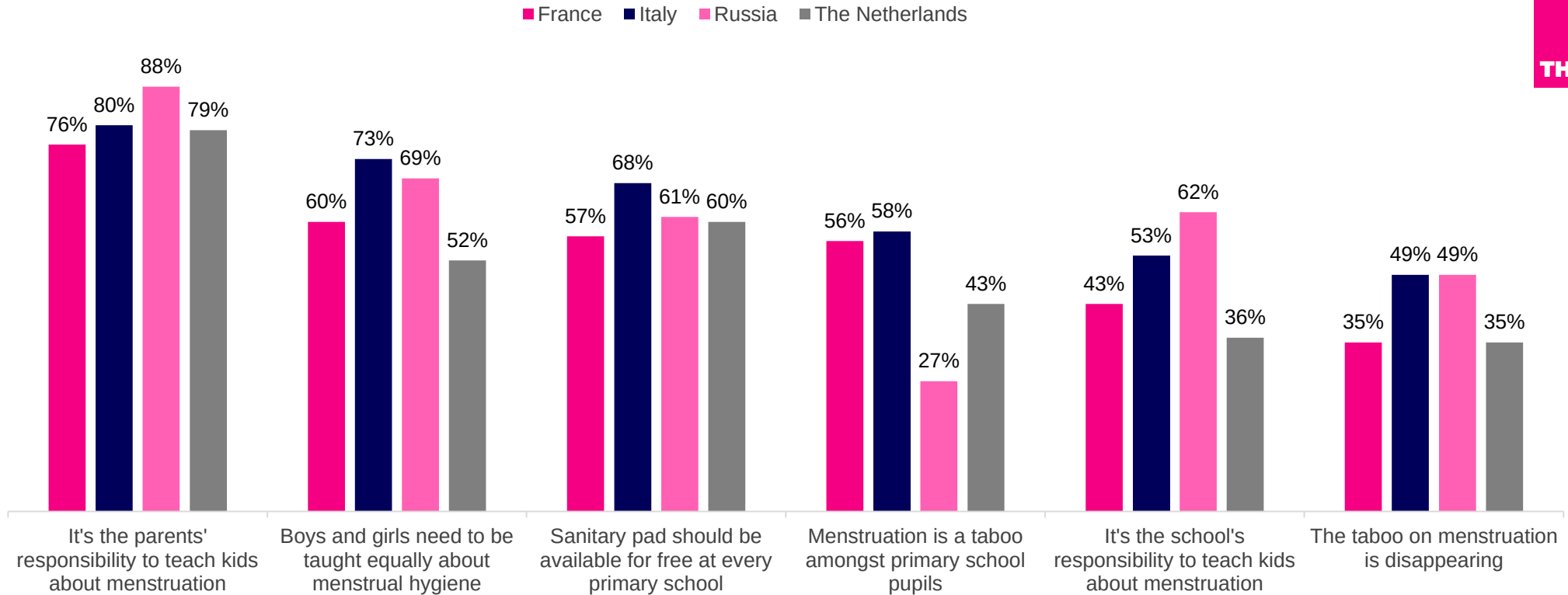
Governments should ensure that menstrual health education is a priority in schools



Women understand the negative effects of not having access to fem-care products and call for political action



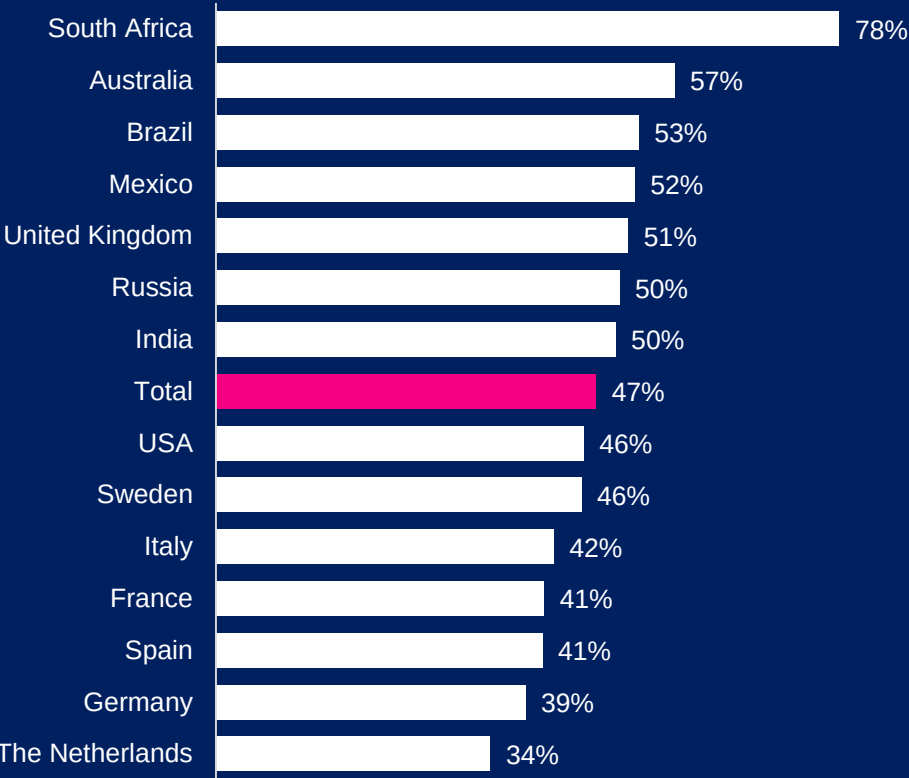
More than half say sanitary pads should be available for free at every primary school



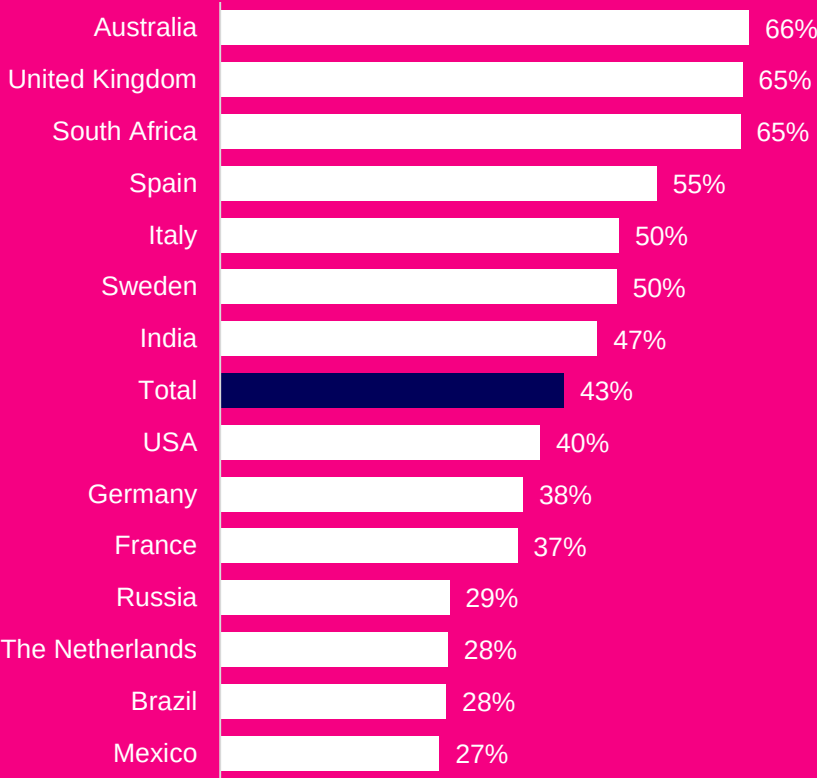
**FRANCE
ITALY
RUSSIA
THE NETHERLANDS**

These thoughts are shared amongst women in all markets

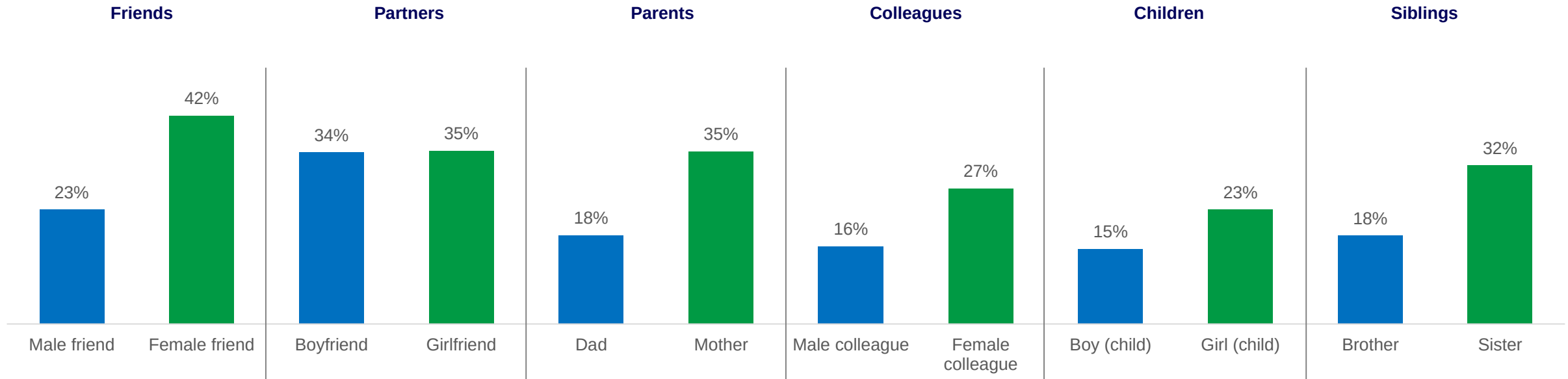
Provide menstruation products for free to vulnerable groups such as students and people living in poverty



Remove taxes from menstrual health products

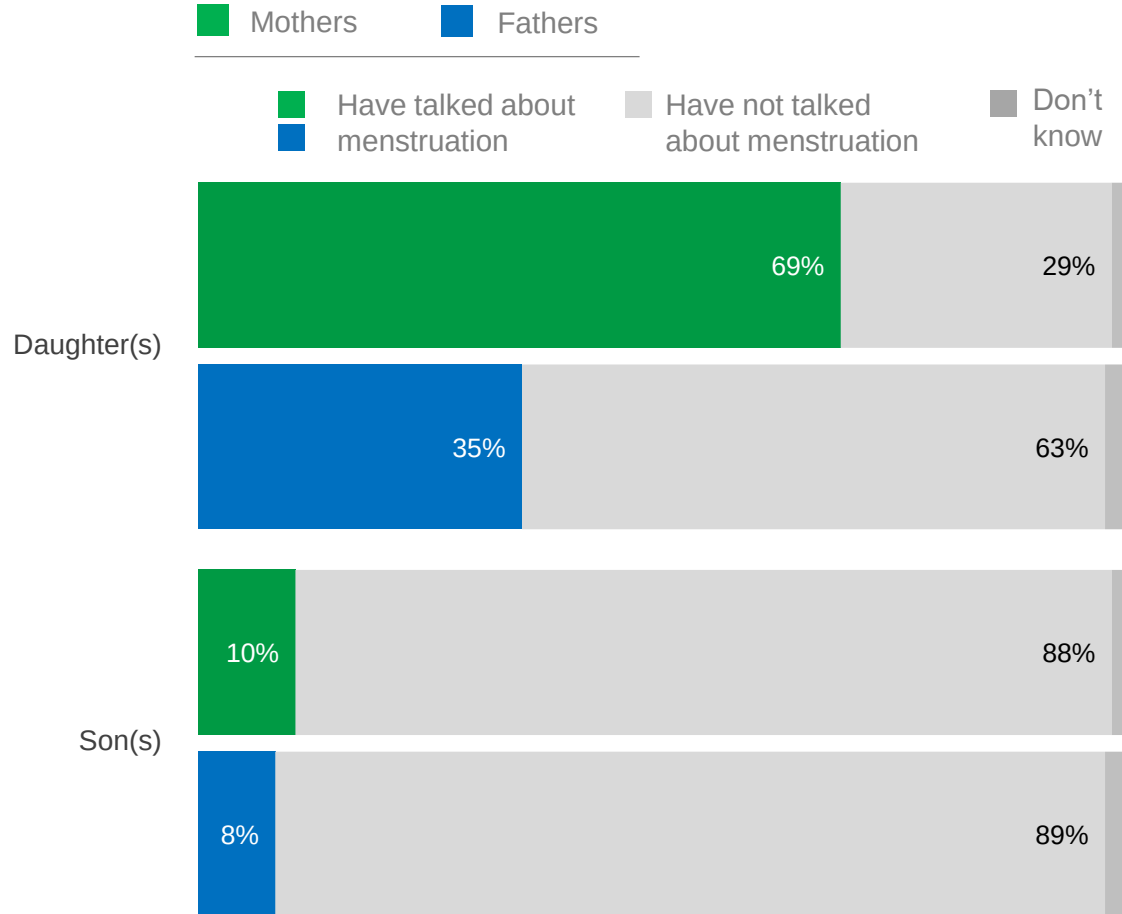


Most prefer not talking to men about menstruation – romantic relationships are the exception



Even mothers and fathers are reluctant to talk to their sons about menstruation

2018



Globally, fewer parents talk to their daughters about menstruation than in 2018

2018



Mothers

Have talked to their daughter(s)
about menstruation

Fathers

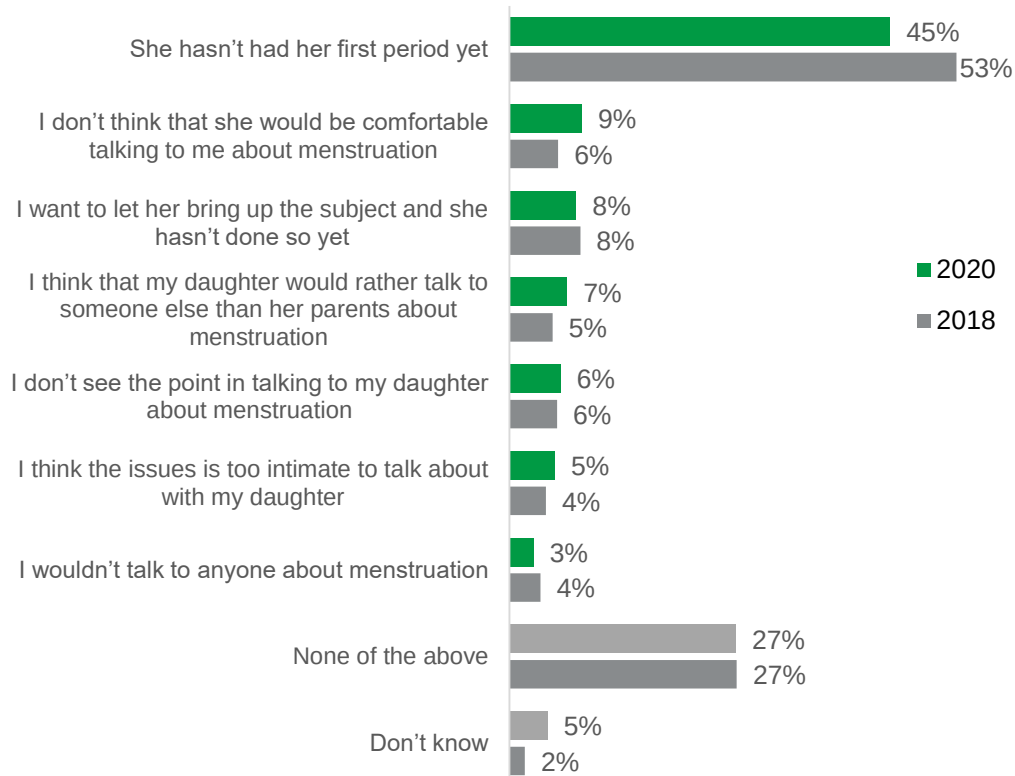
		2018		2018
Total	69%	73%	35%	40%
Australia	68%	72%	16%	27%
Brazil	85%	77%	49%	59%
China	54%	61%	18%	28%
France	69%	73%	46%	64%
Germany	79%	76%	36%	39%
India	58%	64%	31%	45%
Italy	77%	81%	49%	45%
Mexico	81%	81%	62%	54%
Russia	58%	61%	21%	19%
South Africa	72%	75%	45%	43%
Spain	75%	74%	50%	52%
Sweden	58%	66%	29%	25%
The Netherlands	71%	86%	41%	40%
United Kingdom	67%	69%	25%	25%
USA	72%	77%	27%	48%

As in 2018, fathers say it is the mother's job and a women's topic

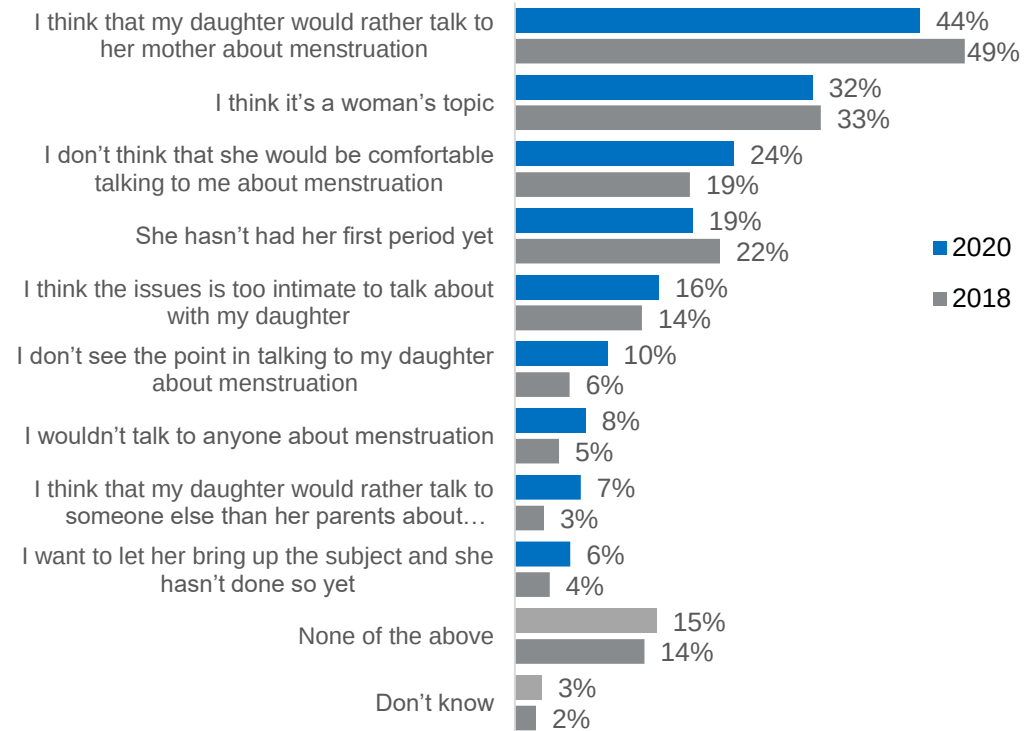
2018



Mothers

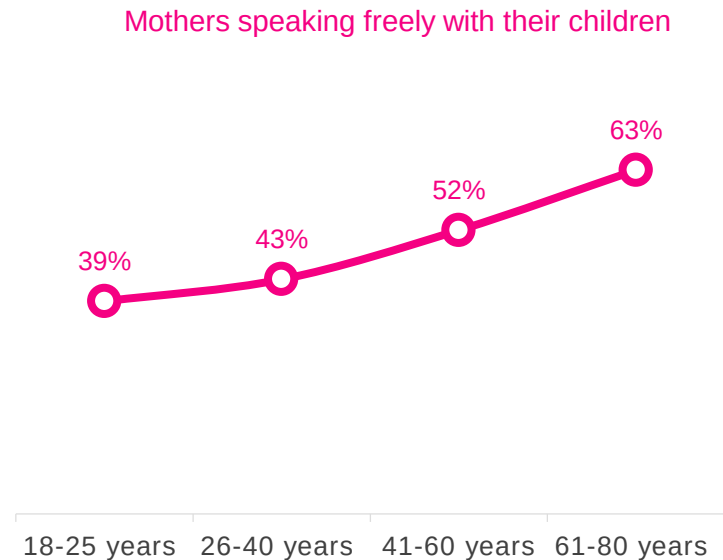
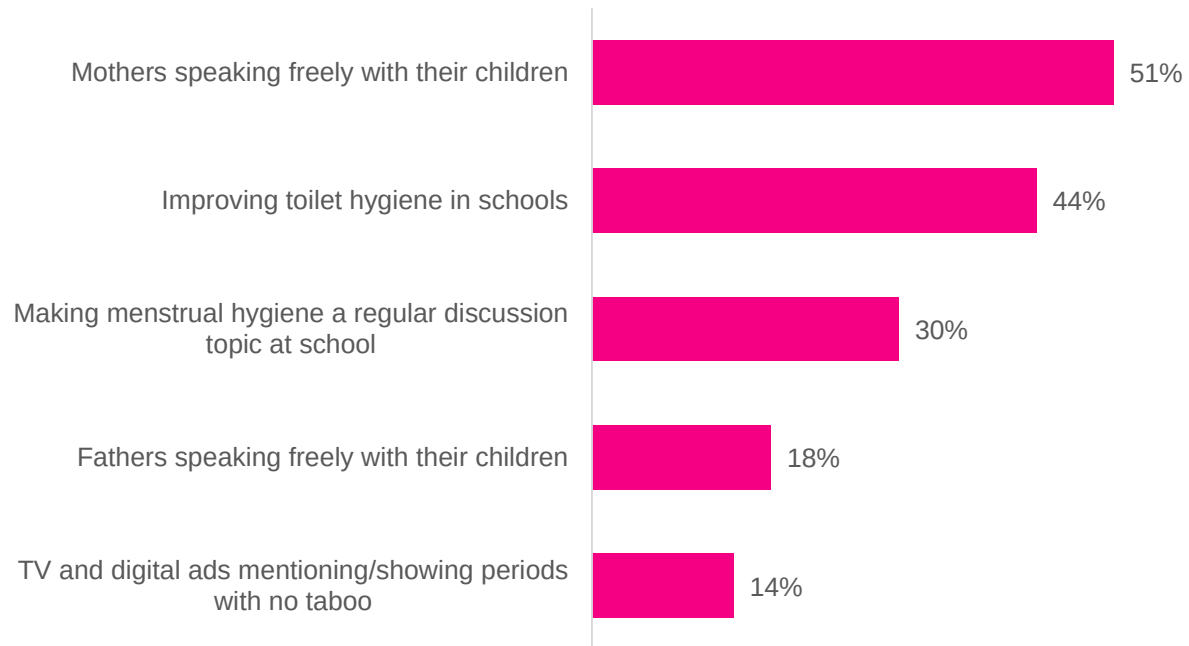


Fathers



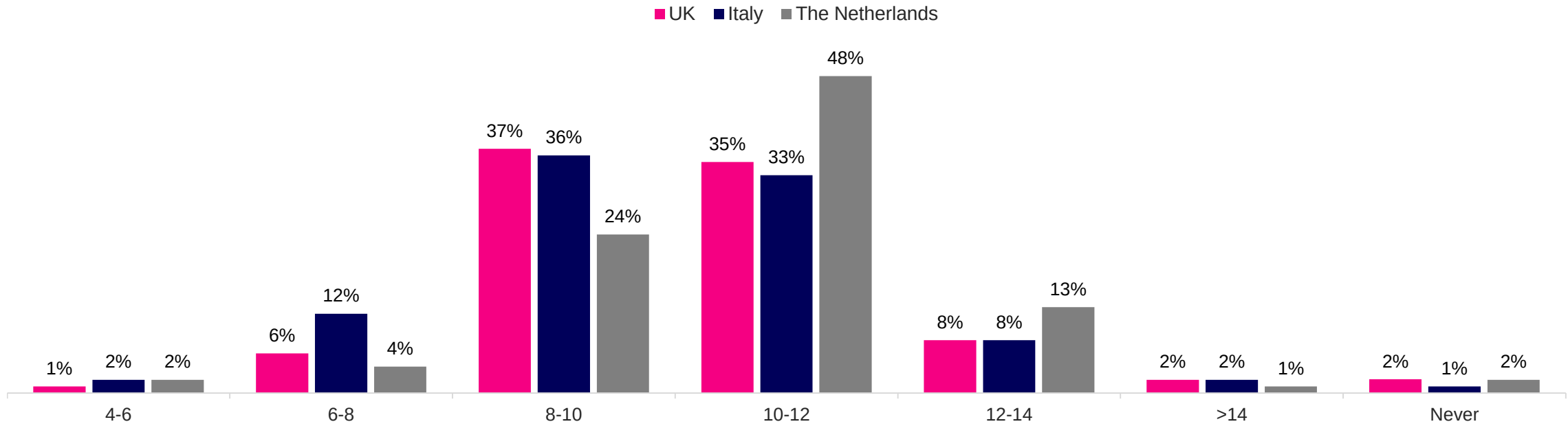
More than half in France say mothers speaking freely about menstruation with their daughters would improve their well-being

FRANCE



8-12 is the most accepted age for educating children on menstruation at school

UK
ITALY
THE NETHERLANDS



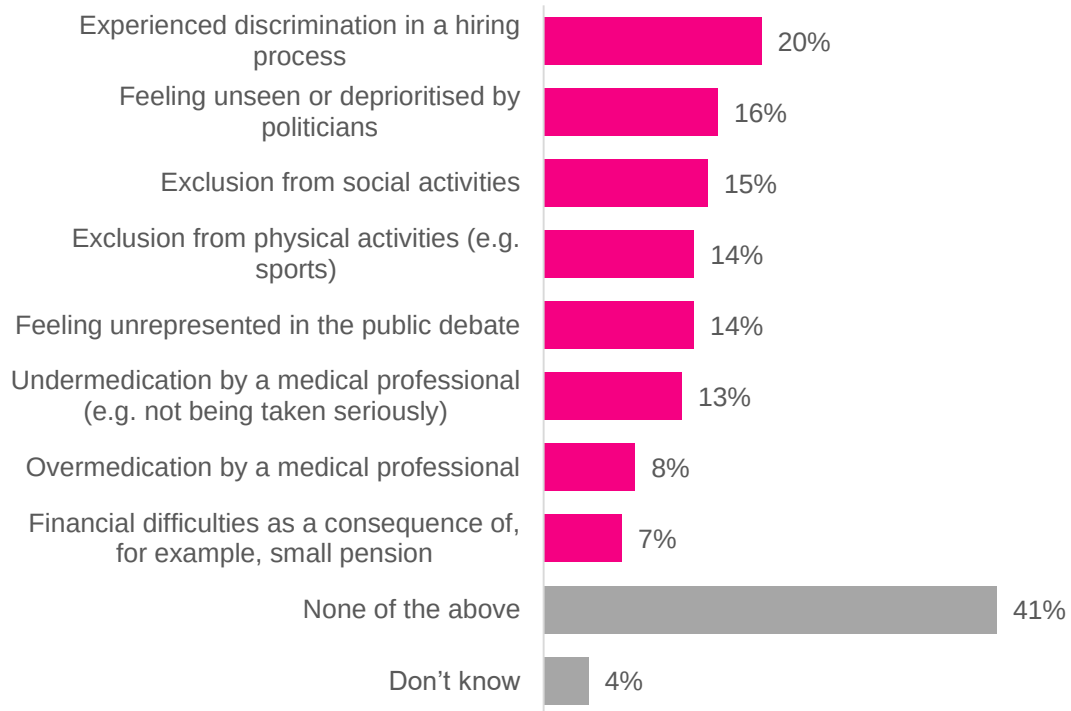
Generations



54%

say they have experienced discrimination
because of their age

1 in 5 have been have experienced discrimination in a hiring process due to their age

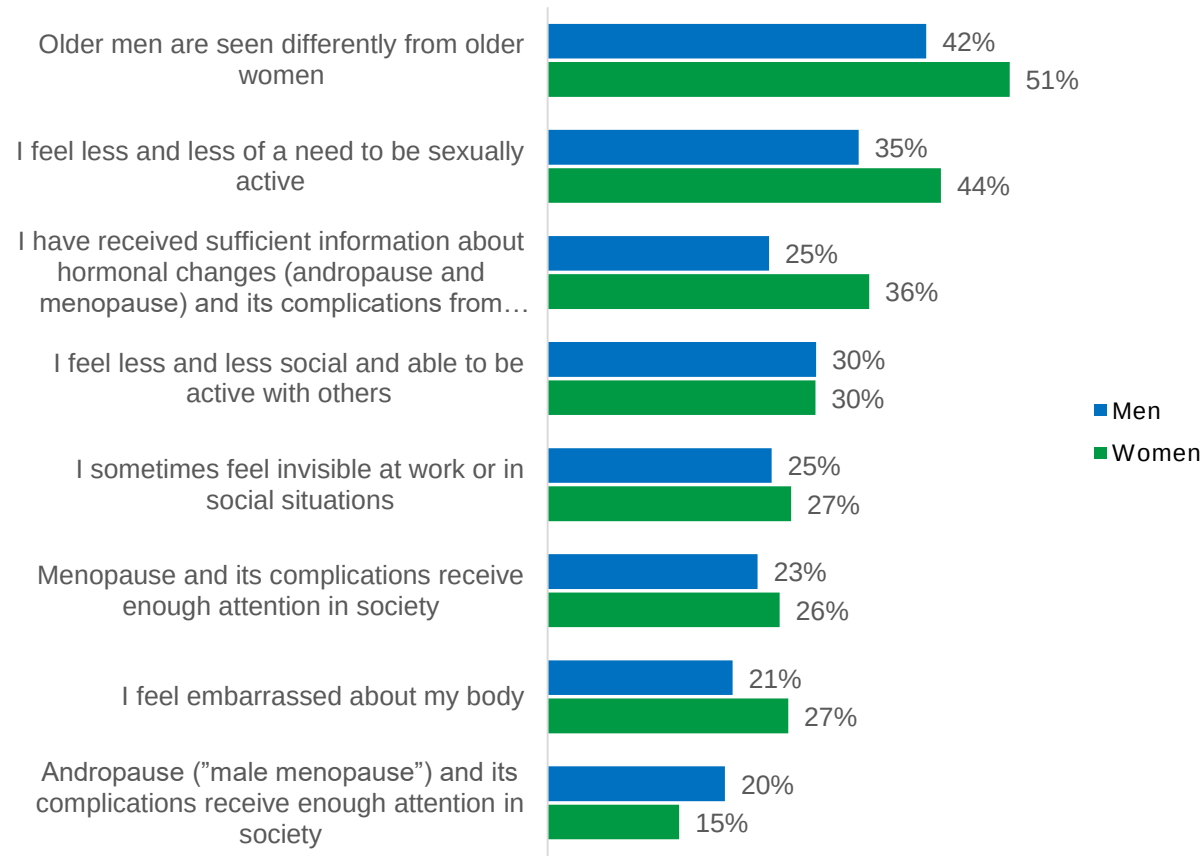


54%

say they have experienced discrimination because of their age

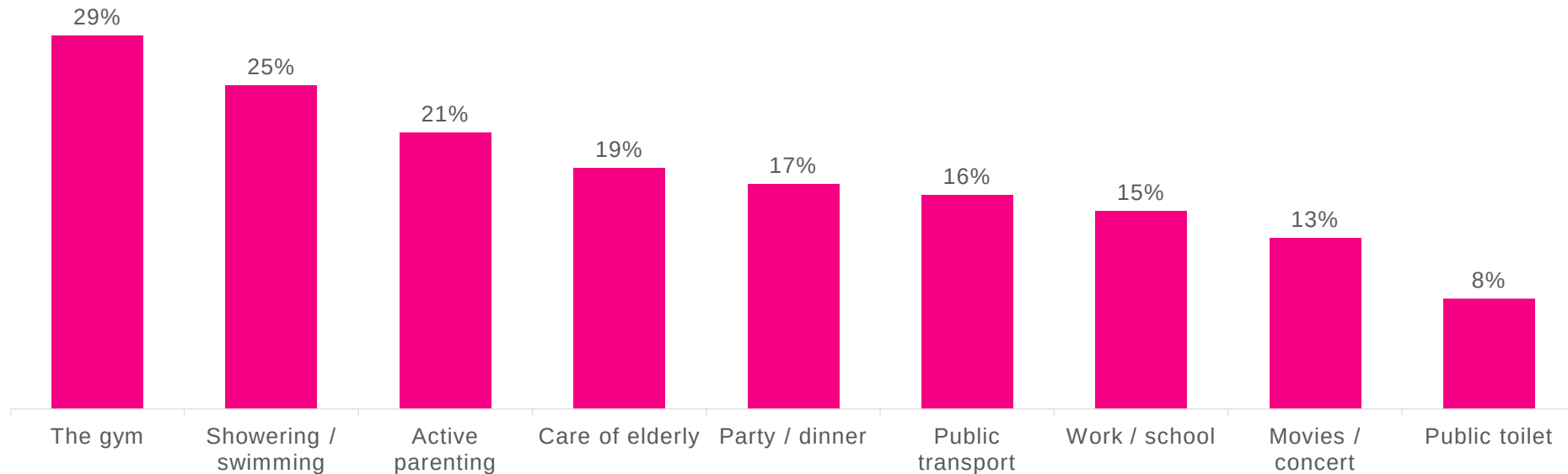
Women experience negative effects of ageing more than men

Base: > 40 years old

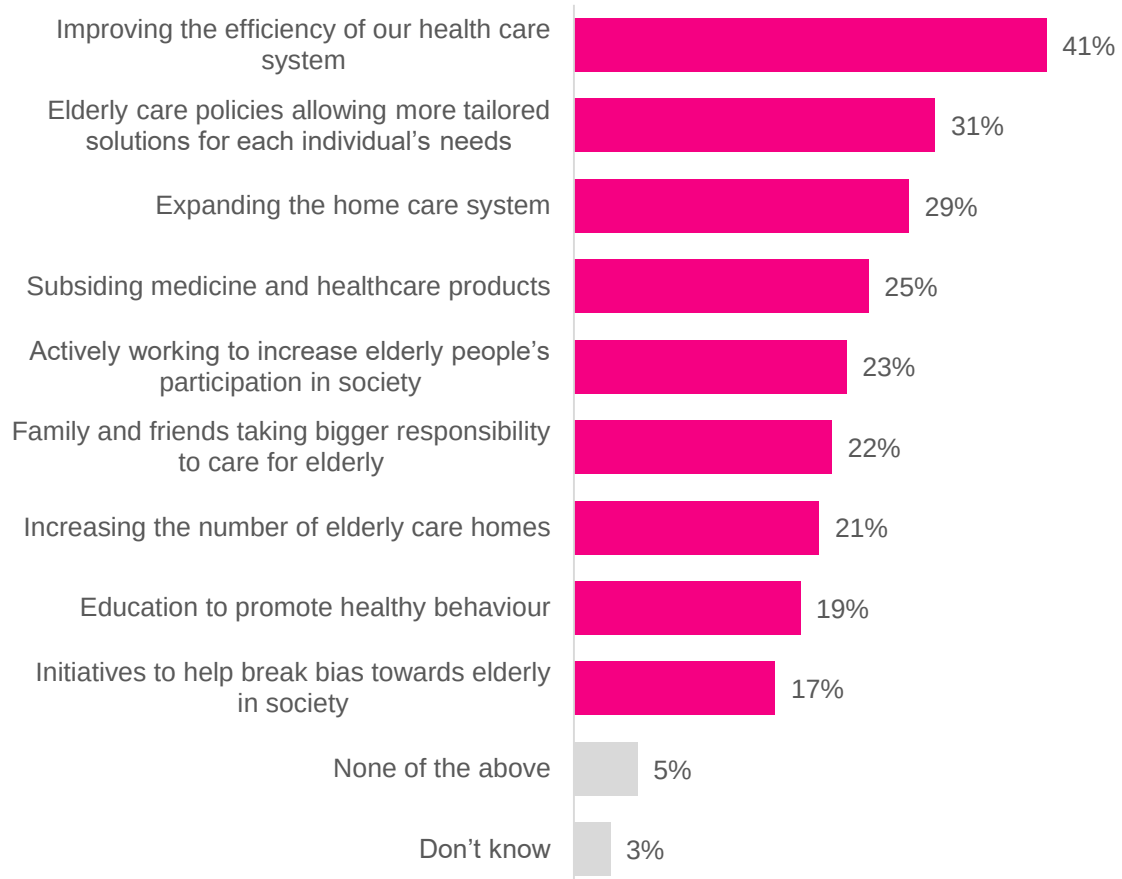


3 in 10 do not feel comfortable visiting the gym due to their age

Base: Have felt too embarrassed or uncomfortable to participate in everyday social activities due to matters connected to ageing

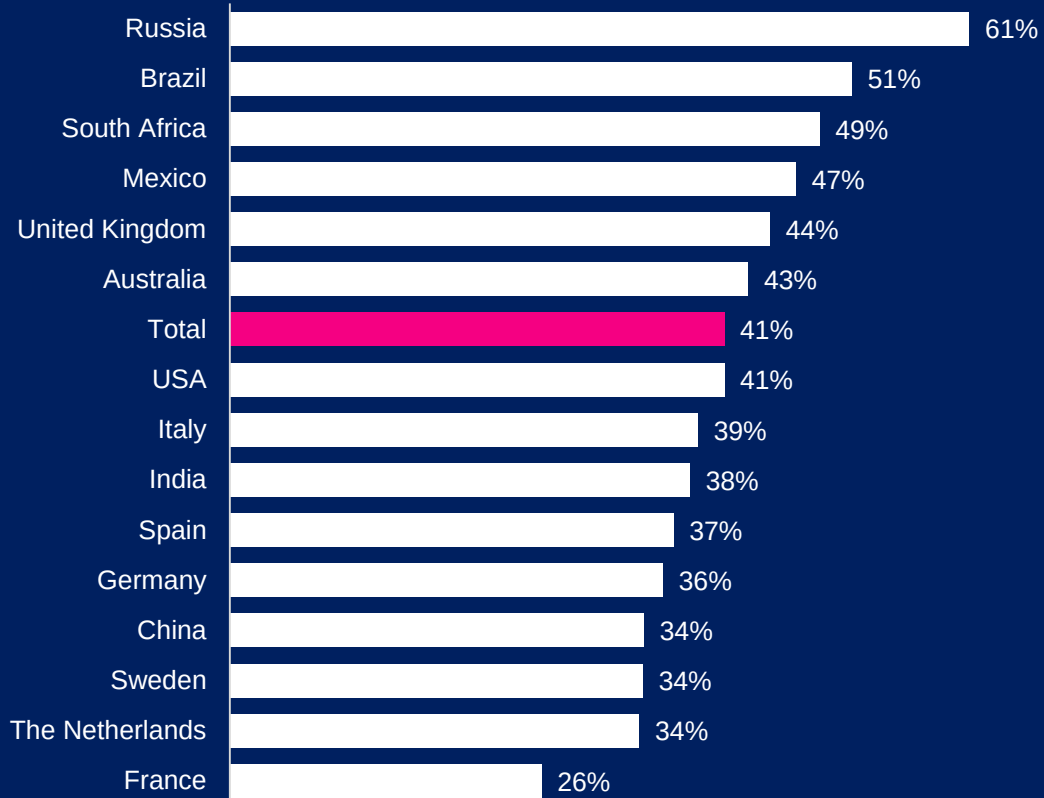


Improving efficiency is considered key to improve the health of elderly people

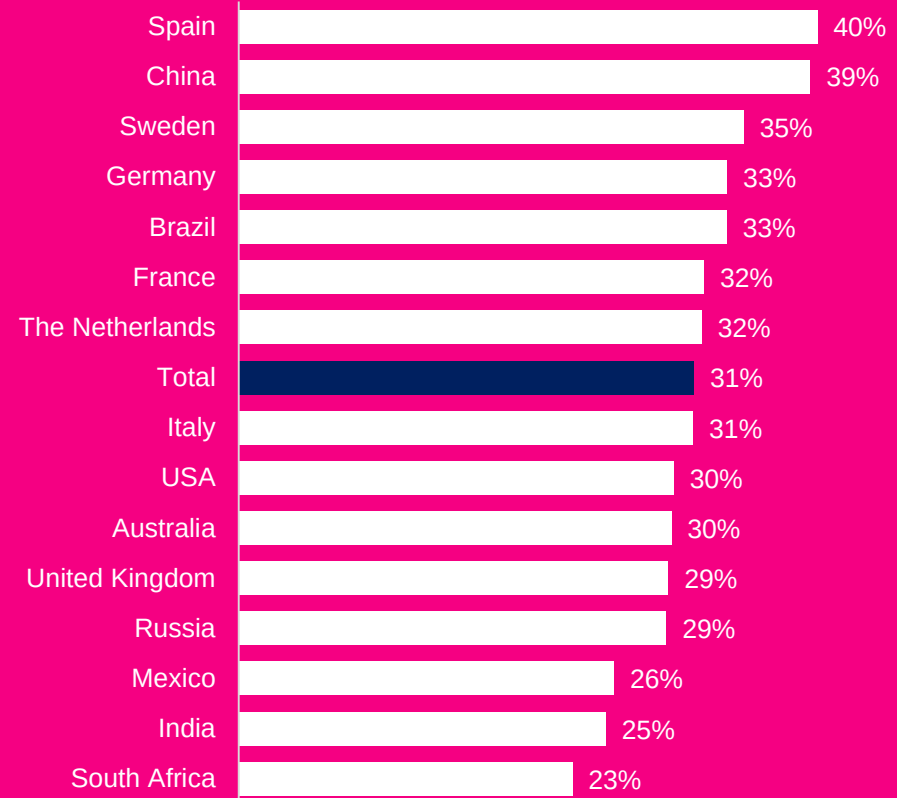


Most markets seem to choose between efficiency or personalization of health care systems

Improving the efficiency of our health care system

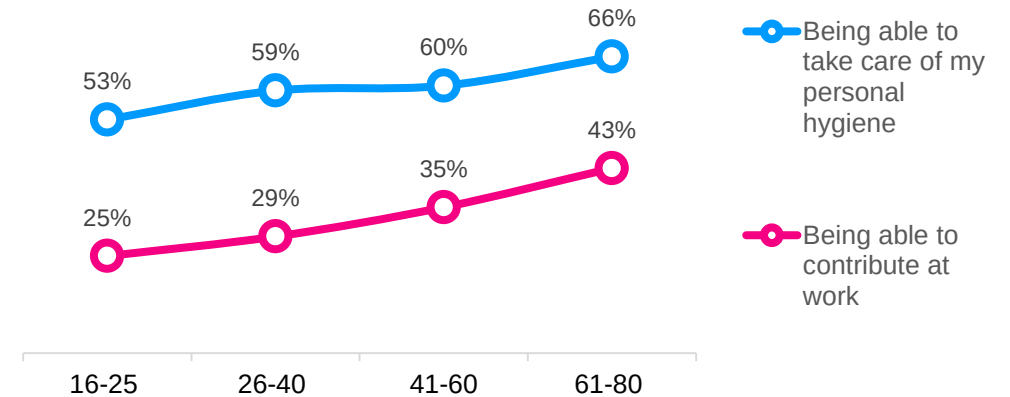
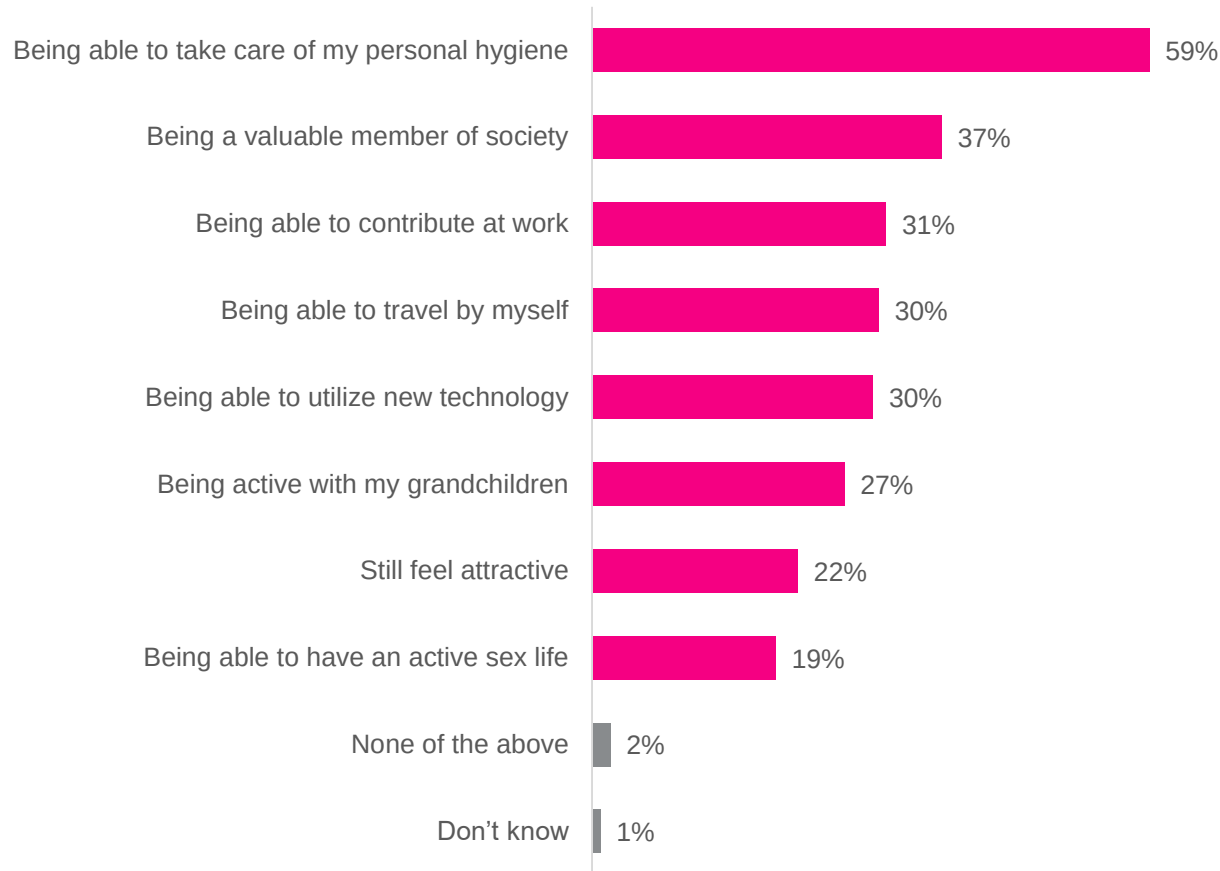


Elderly care policies allowing more tailored solutions for each individual's needs



Being able to take care of personal hygiene is considered most essential in Mexico to live a good life when older

MEXICO



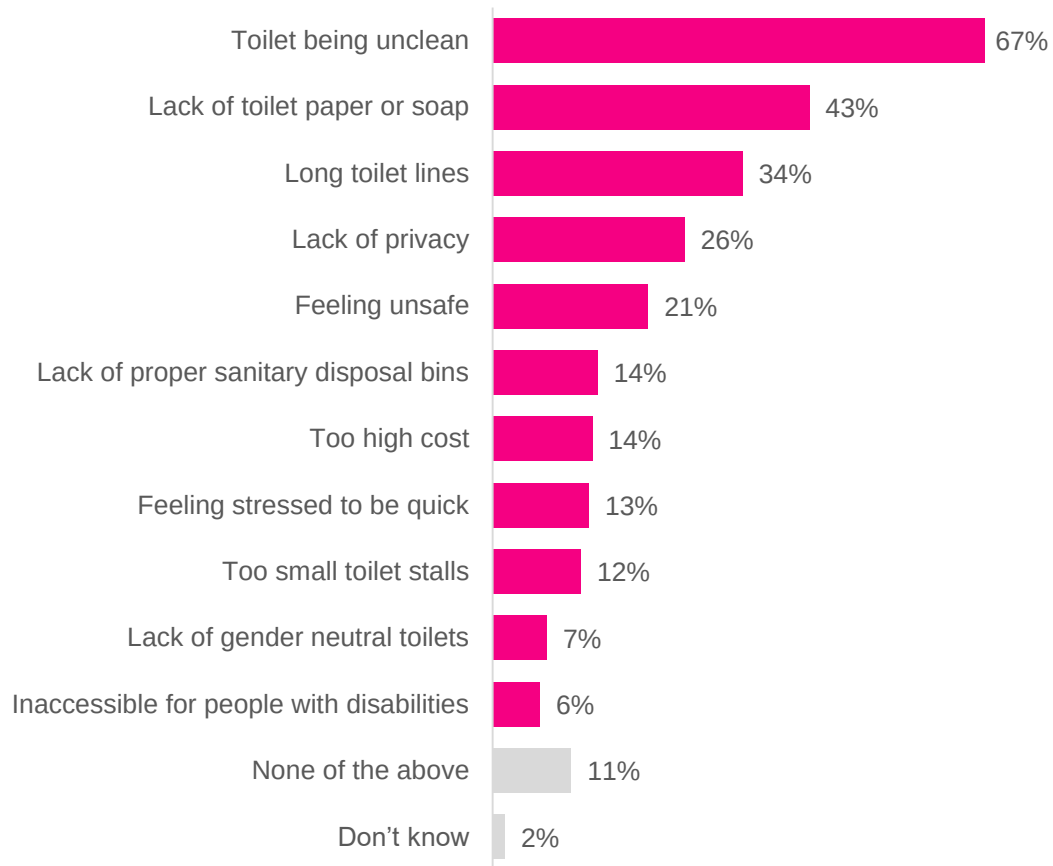
Public Hygiene



87%

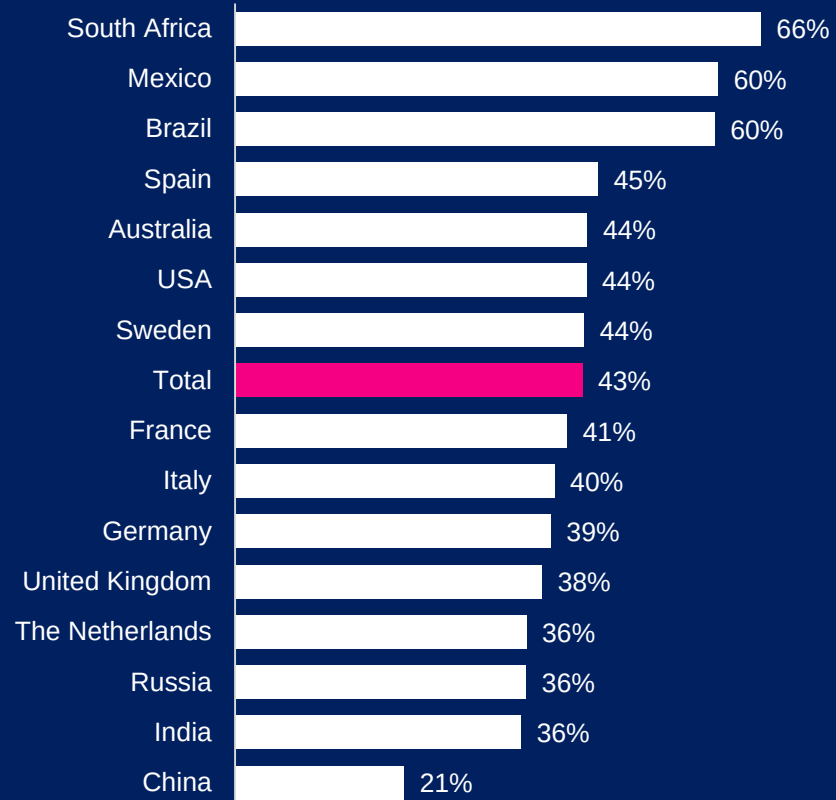
have refrained from using a public toilet

Unclean toilets and lack of paper or soap are the leading causes for not using a public toilet

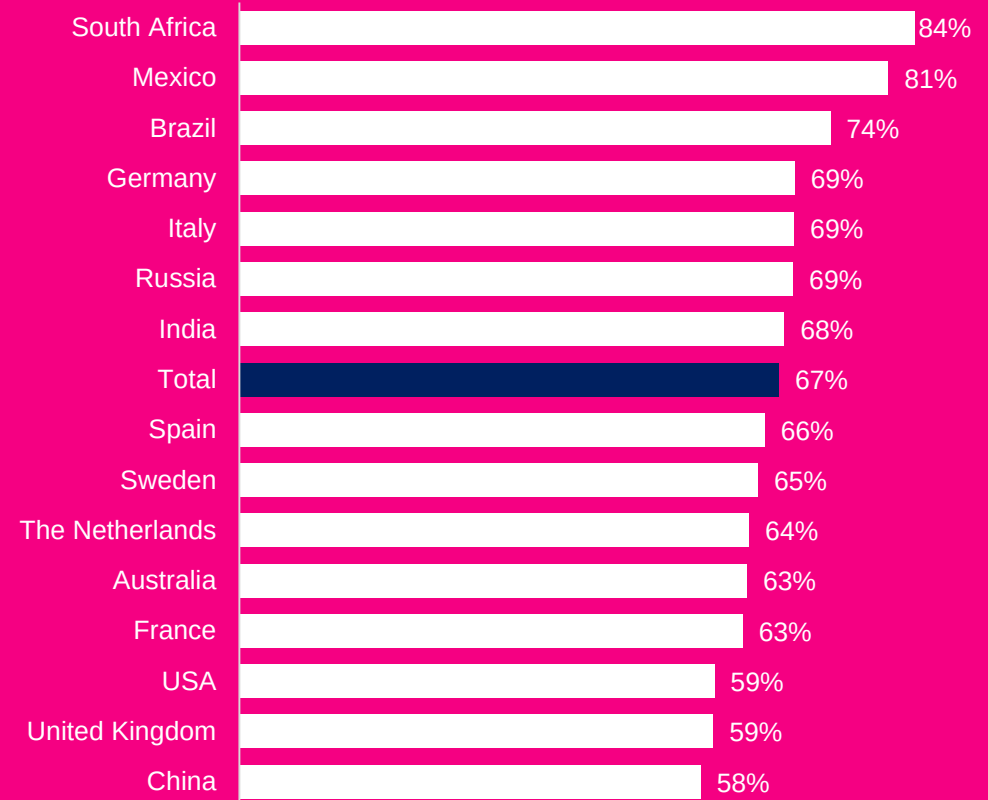


Lack of toilet paper or soap, and unclean toilets - a huge concern for certain markets

Lack of toilet paper or soap

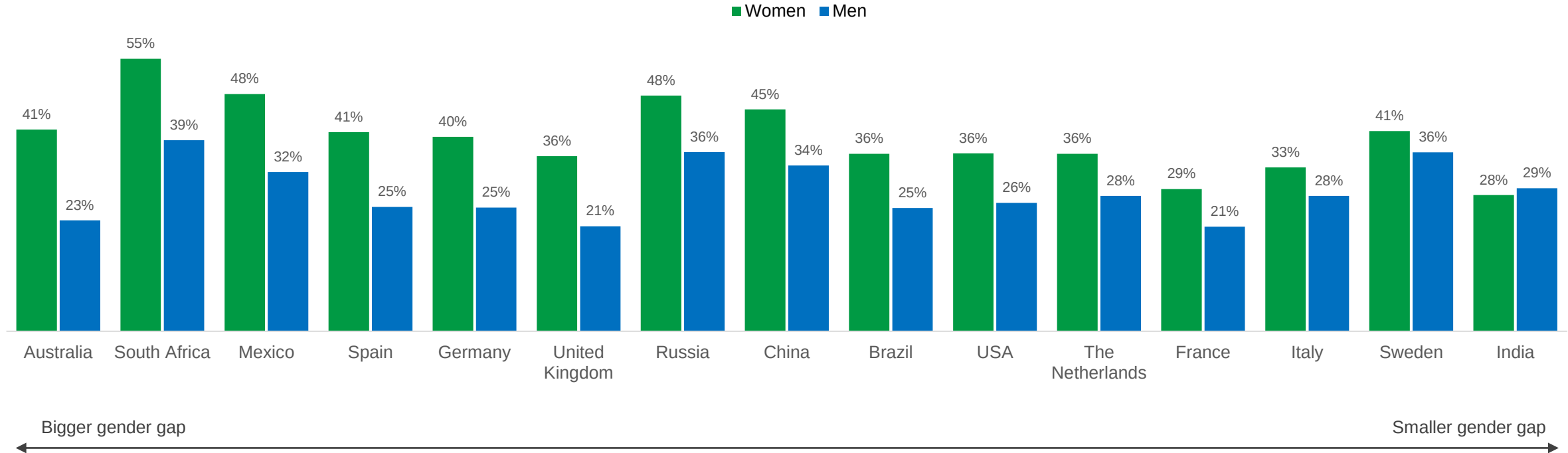


Toilet being unclean



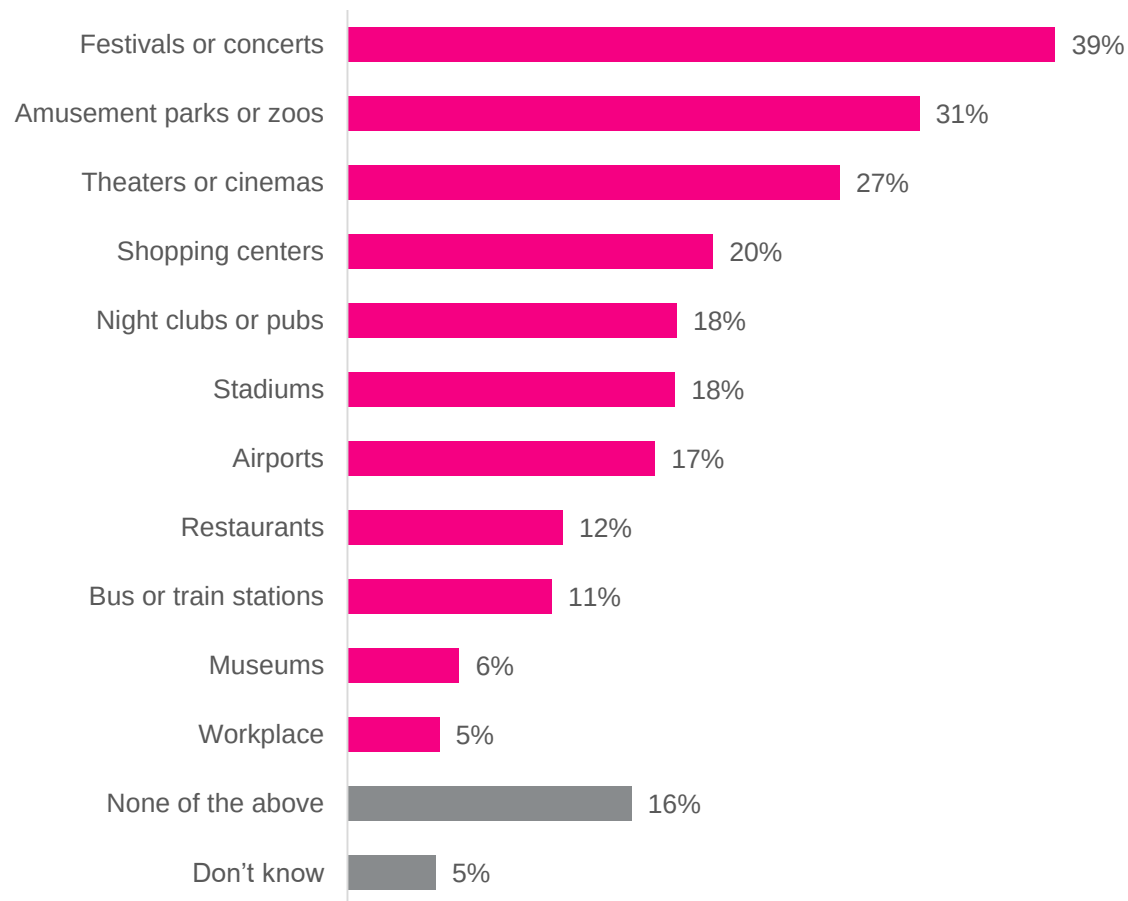
“The toilet-line gender gap”

Has refrained from using a public toilet
due to long toilet lines

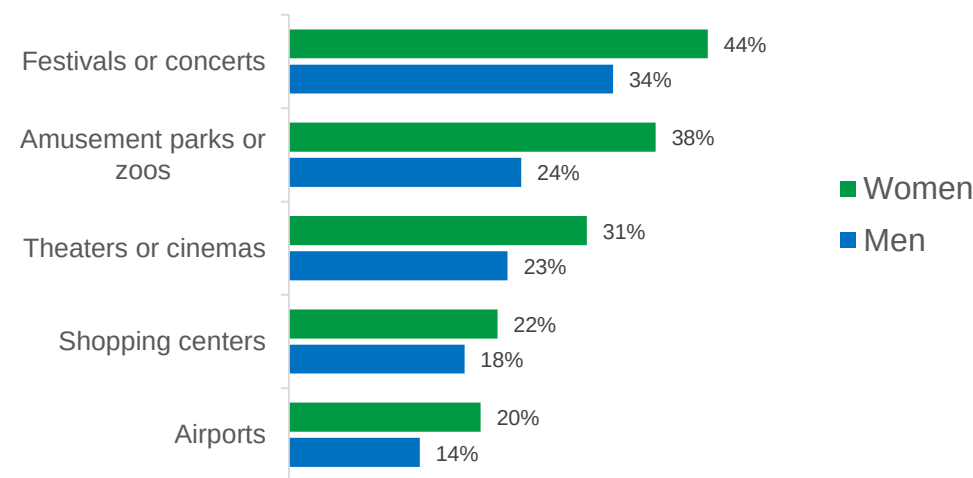


People in the Netherlands encounter long queues most at festivals and amusement parks

THE NETHERLANDS



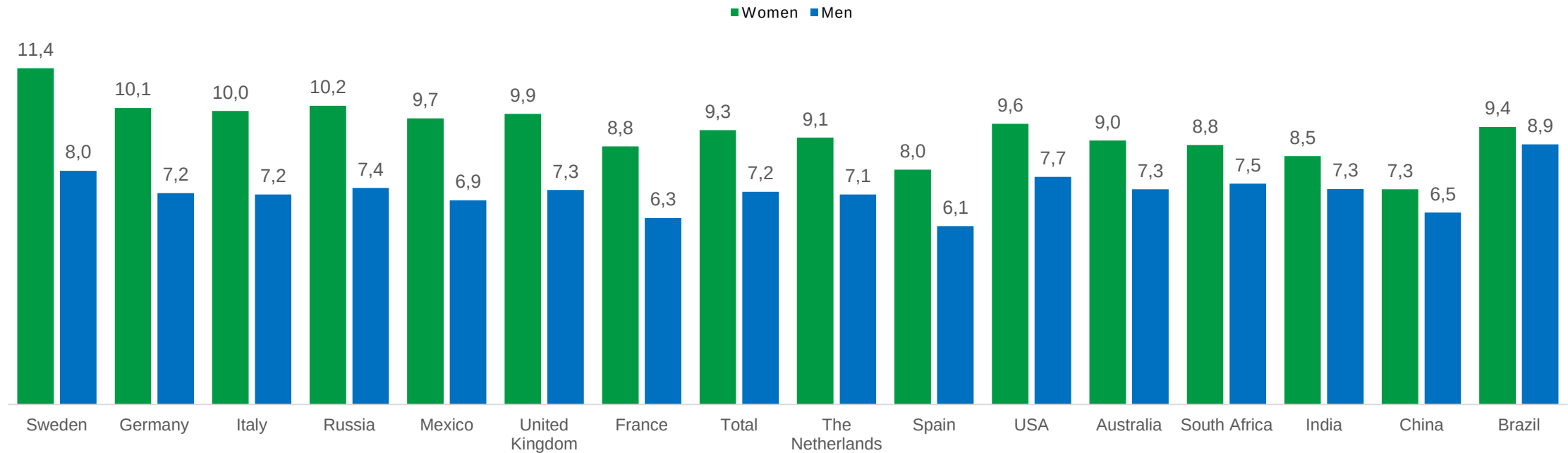
Usually encounter long toilet queues



Swedish women wash their hands the most

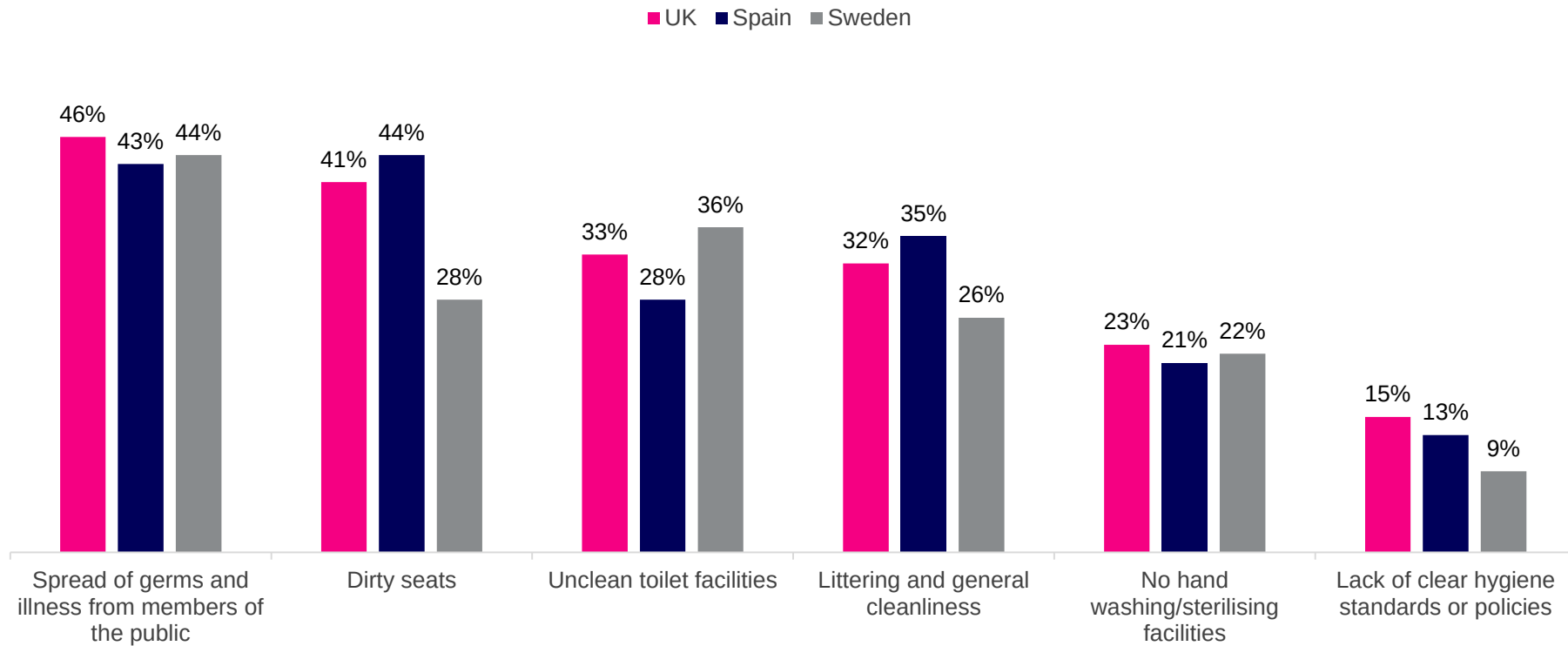
2018

Average number of times people
wash their hands in a day



Spread of germs and illness from members of public is the biggest concern on public transport

UK
SPAIN
SWEDEN



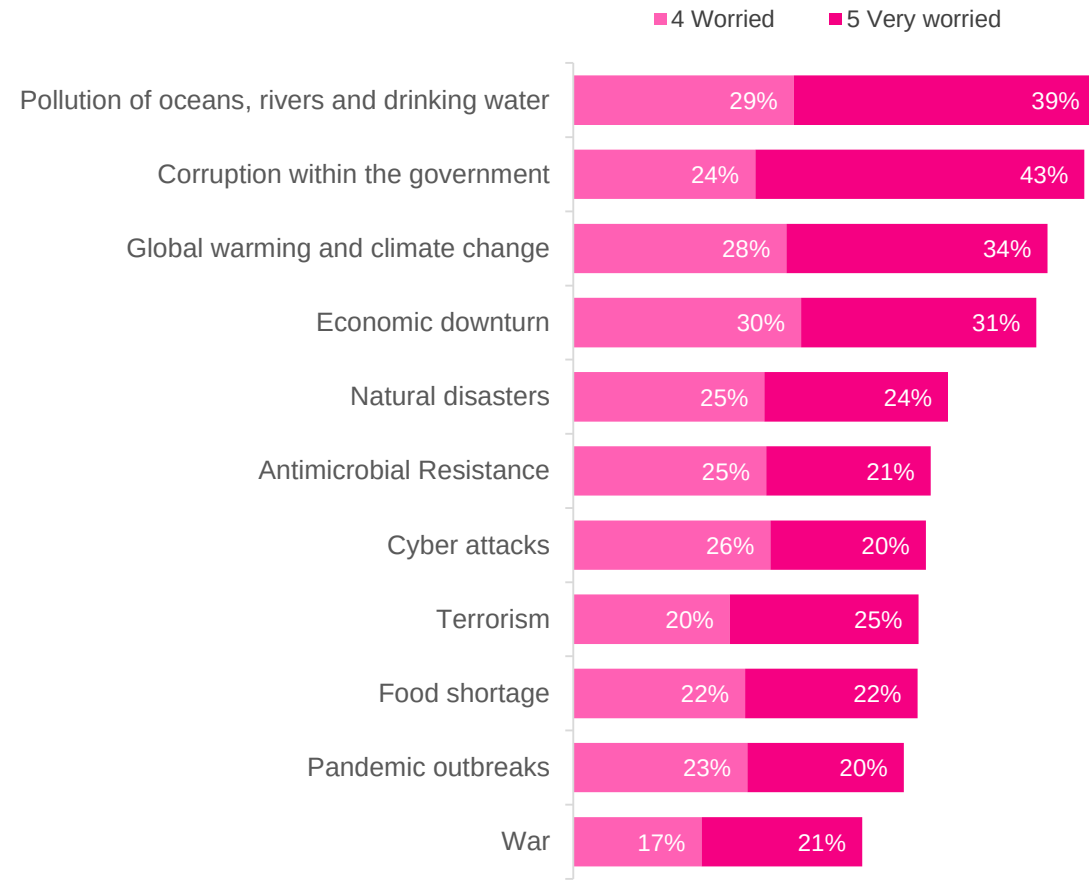
Public Health Threats

A group of people are sitting on a grassy area, possibly a park, with a city skyline in the background. The sun is low in the sky, creating a warm, golden light. The people are dressed in casual clothing, and there are some items on the ground, like a bag and a container. The city skyline features several tall buildings, including a prominent one with a spire. The overall scene is peaceful and suggests a public space where people are enjoying the outdoors.

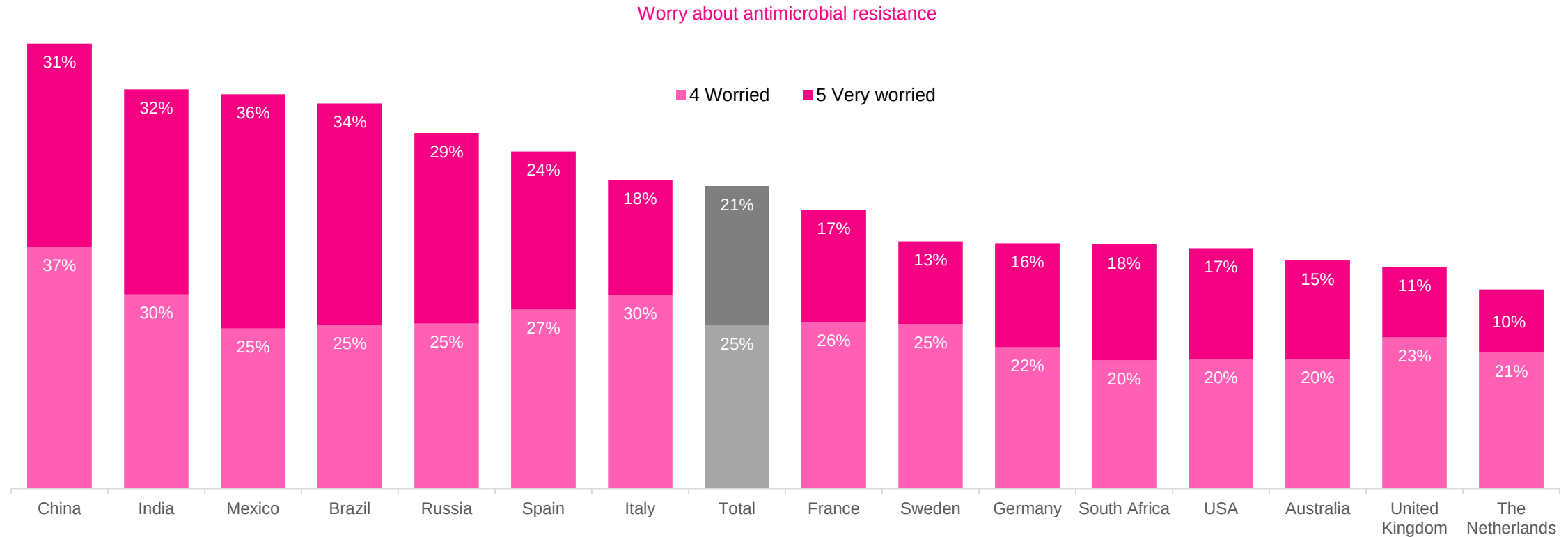
46%

say antimicrobial resistance is a public health threat where they live

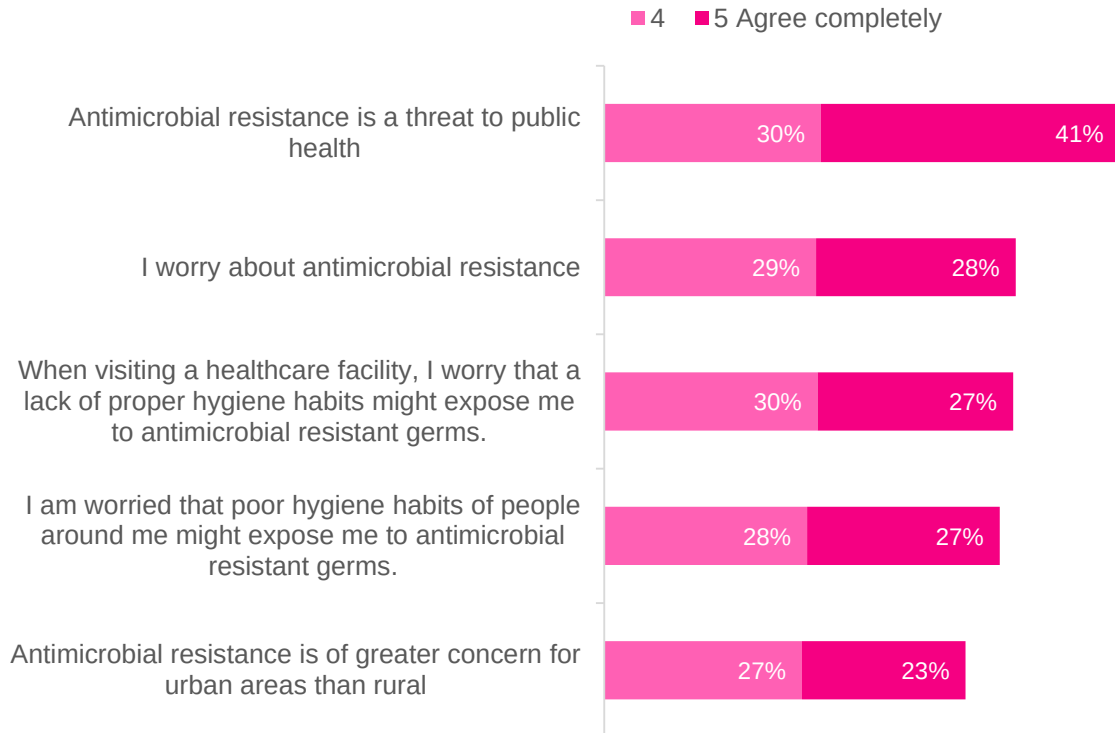
Pollution of oceans, rivers and drinking water is perceived to be the greatest threat to public health



China, India and Mexico are most worried about antimicrobial resistance



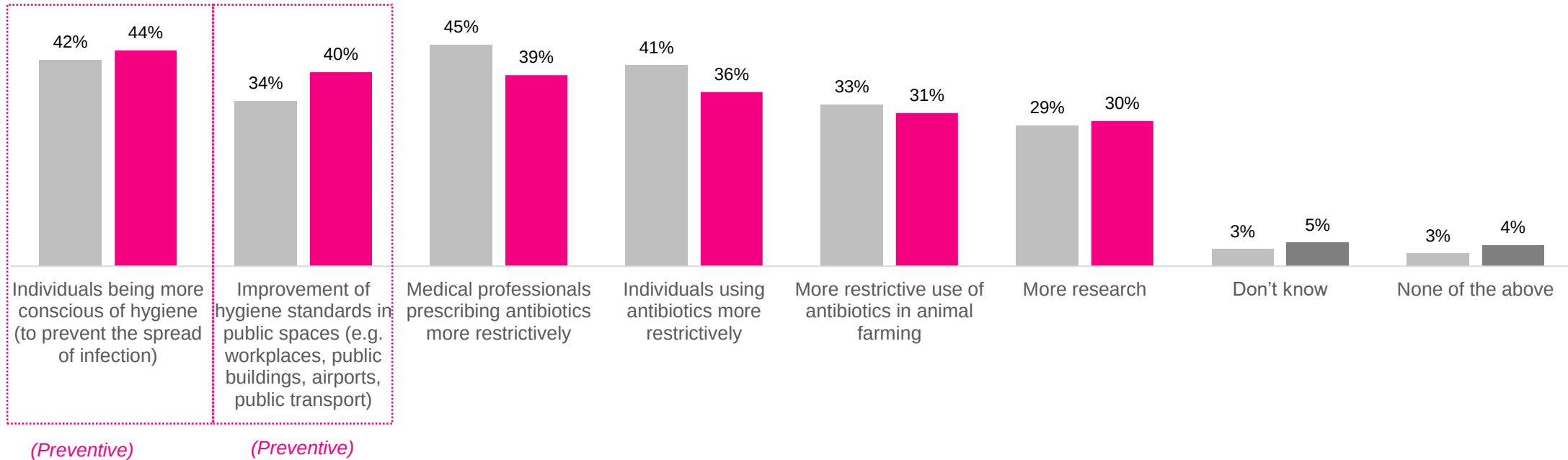
More than half worry that the lack of proper hygiene habits at hospitals might expose them to antimicrobial resistant germs



More advocate for preventive measures to combat multi-resistant bacteria than in 2018

2018

■ 2018 ■ 2020



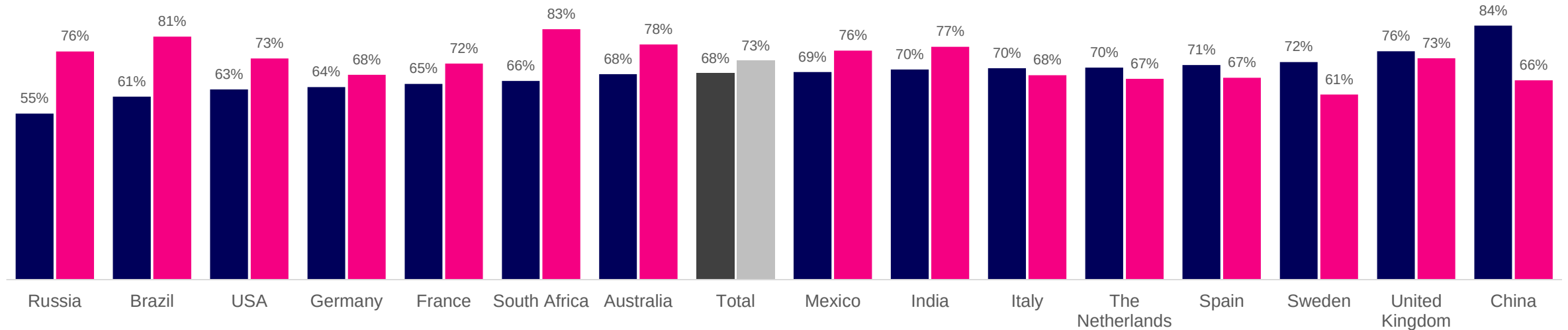
But still room for improvement in the awareness of importance of prevention to combat antibiotic resistance

Restricting use

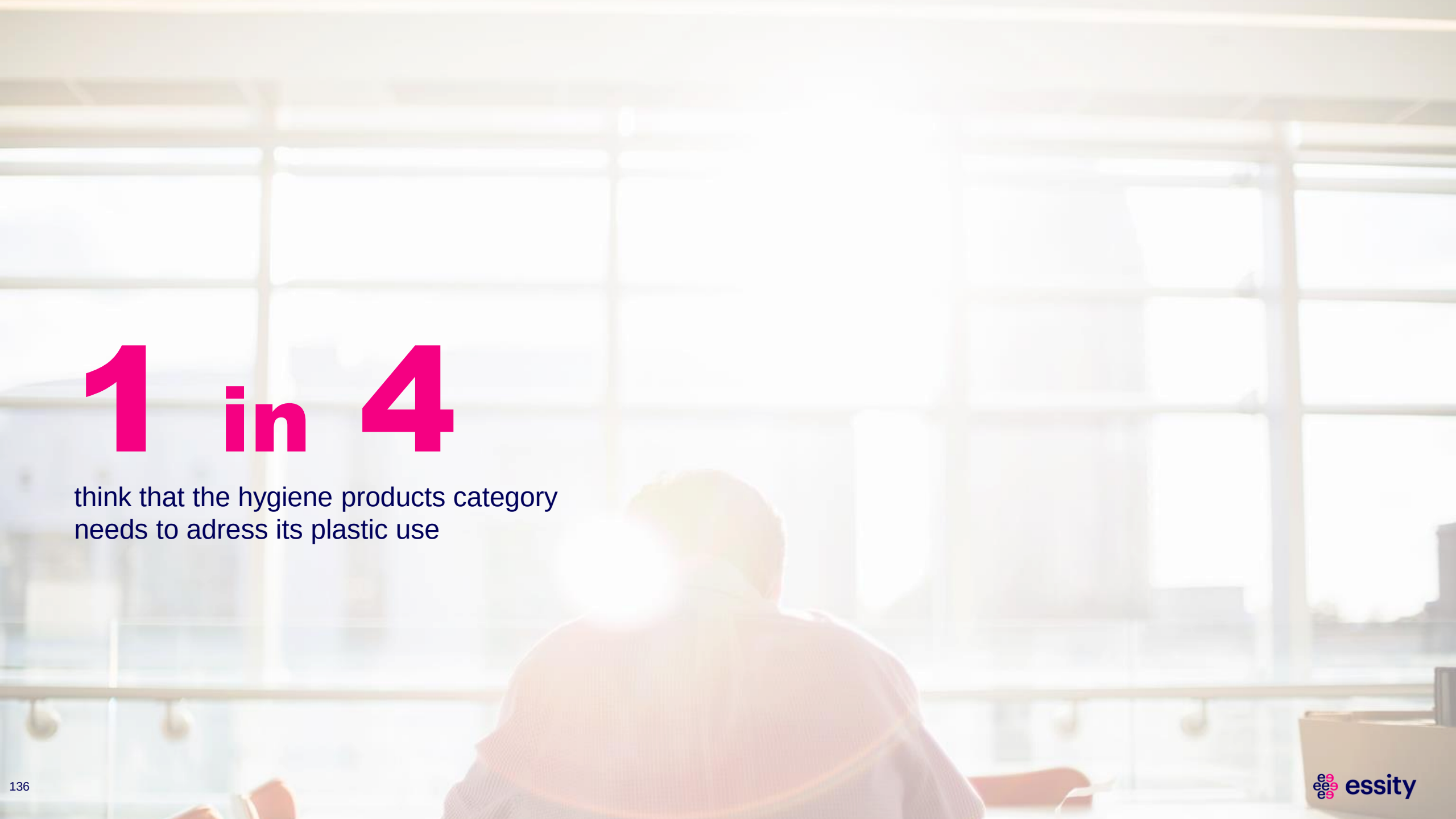
Share of respondents who have answered one or both of “Medical professionals prescribing antibiotics more restrictively” / “Individuals using antibiotics more restrictively”

Preventive measures

Share of respondents who have answered one or both of “Individuals being more conscious of hygiene” / “Improvement of hygiene standards in public spaces”



Sustainability

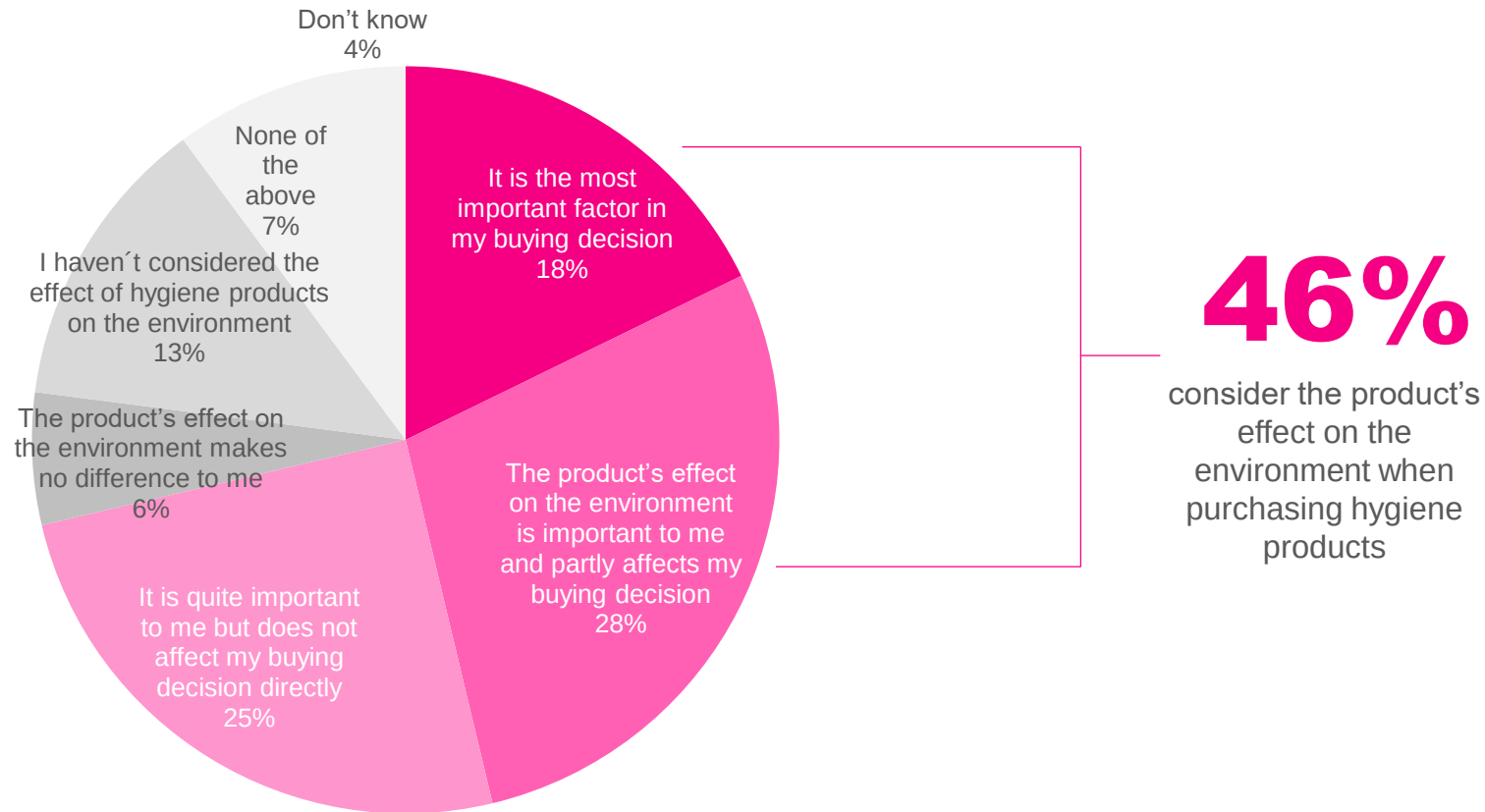
A person is seen from behind, sitting at a desk and looking out a large window. The window shows a bright, hazy cityscape. The person is wearing a light-colored sweater. The overall atmosphere is bright and airy.

1 in 4

think that the hygiene products category
needs to address its plastic use

Almost half of the respondents consider hygiene products' effect on the environment before purchase

2018

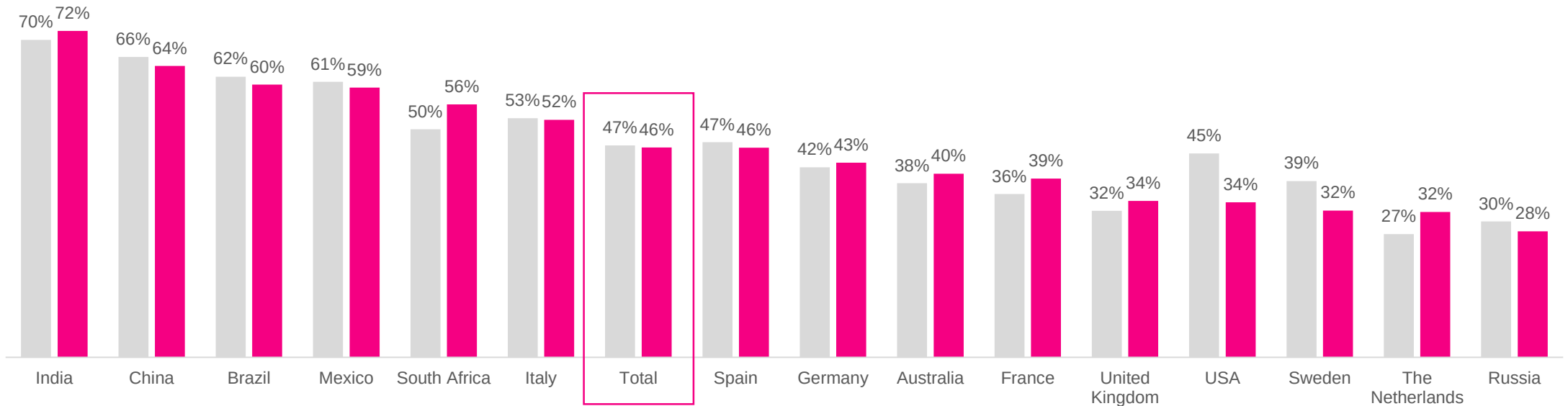


The concern for hygiene products' effect on the environment is almost equal to that in 2018

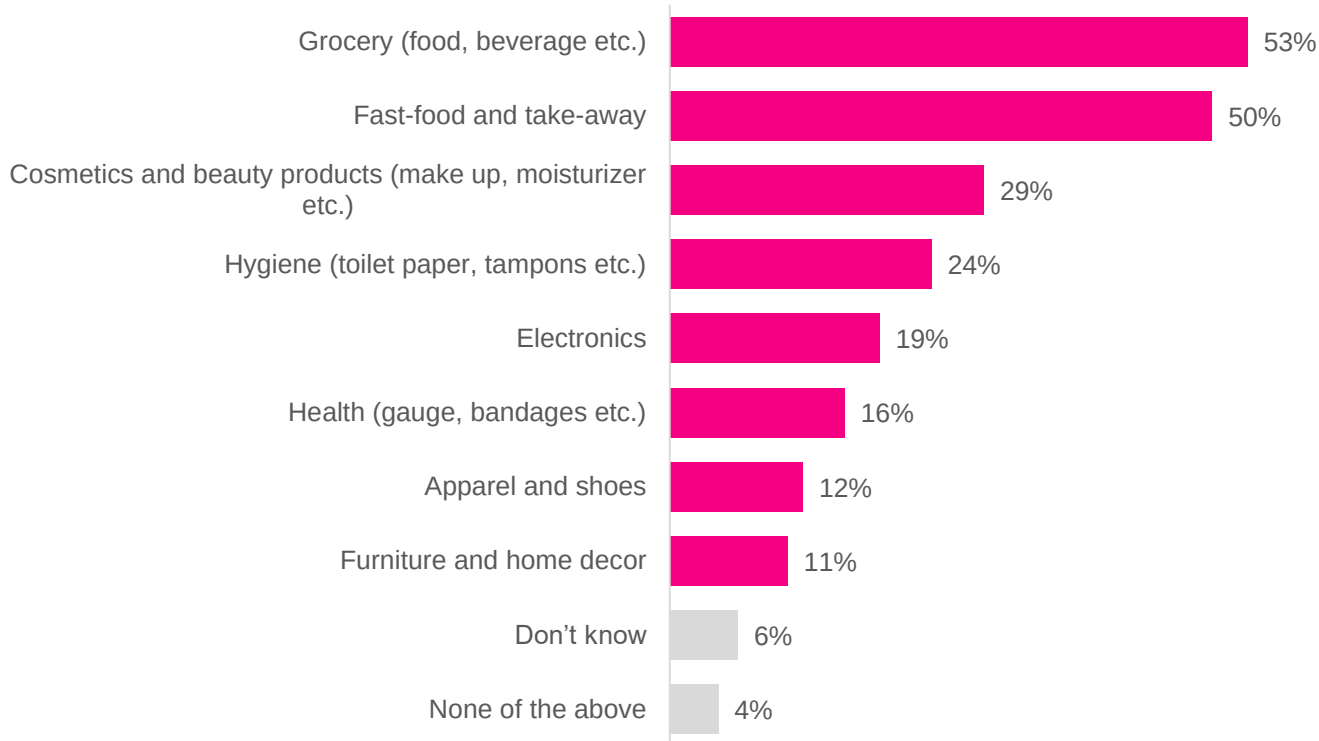
2018

Consider hygiene products' effect on the environment important

■ 2018 ■ 2020

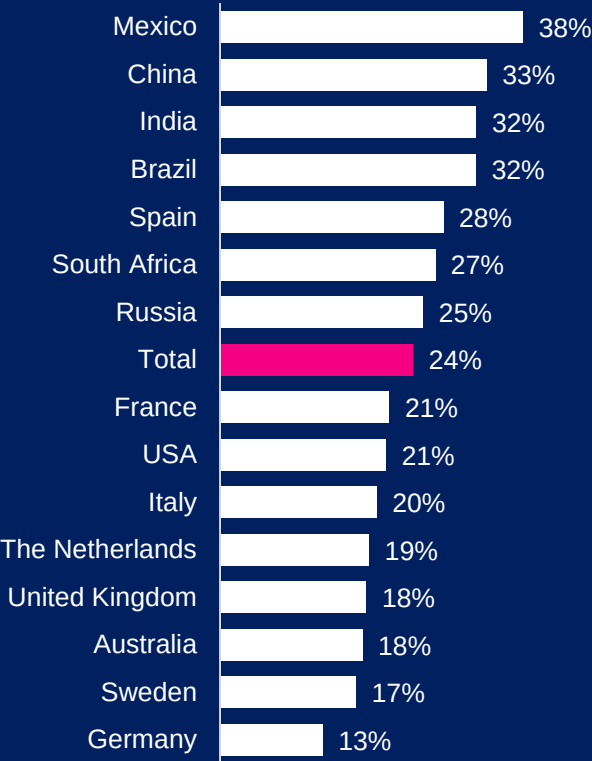


Most people think the Food & Beverage product category needs to address plastic use most urgently

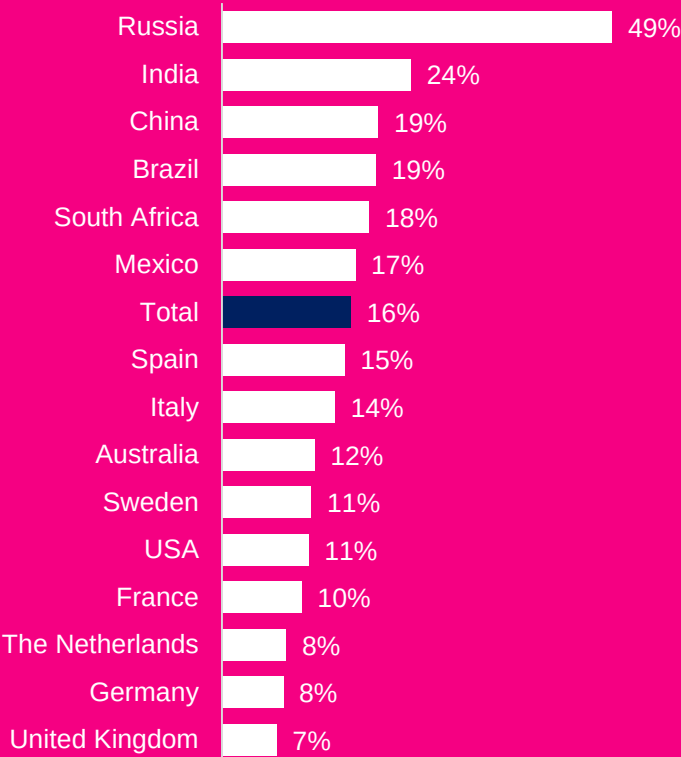


The demands on hygiene and health products to reduce plastic use are still comparatively low

Hygiene products

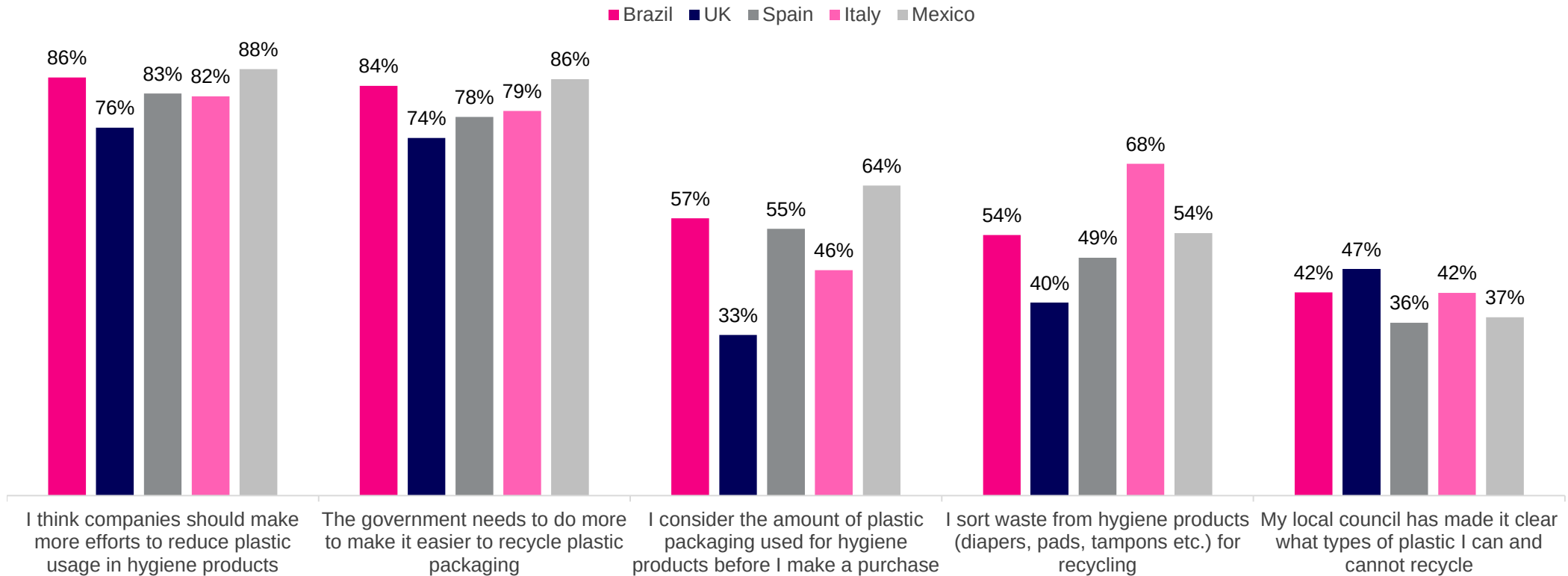


Health products



Most locate the responsibility for sustainable practices with companies or the government

**BRAZIL
UK
SPAIN
ITALY
MEXICO**

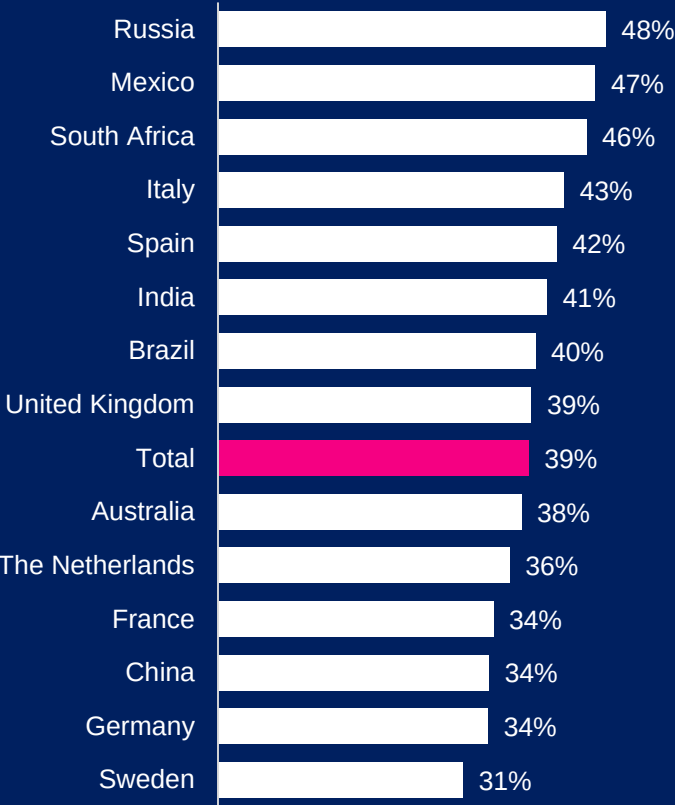


Knowing for sure that products will be recycled could make people recycle hygiene products more

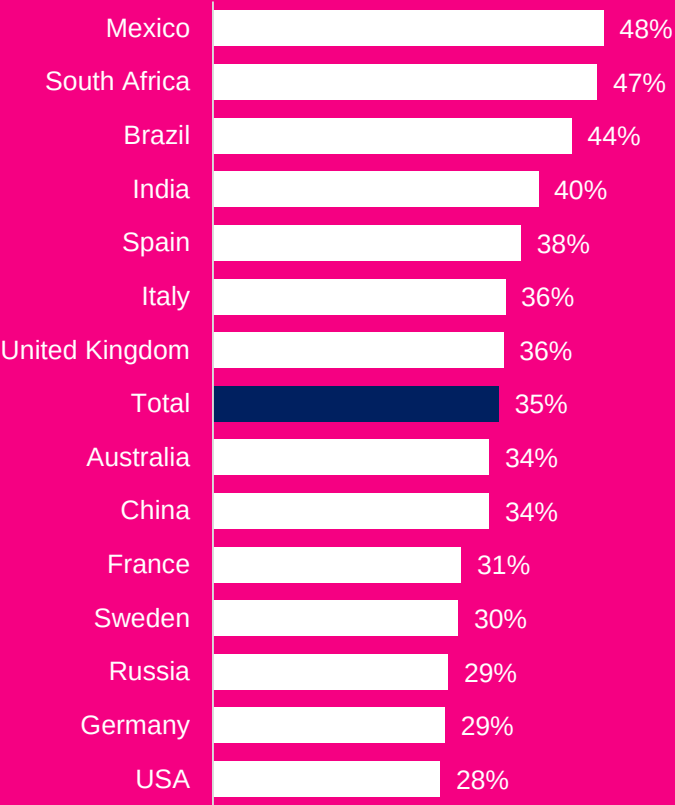


Trust and information are key to improve recycling of hygiene products

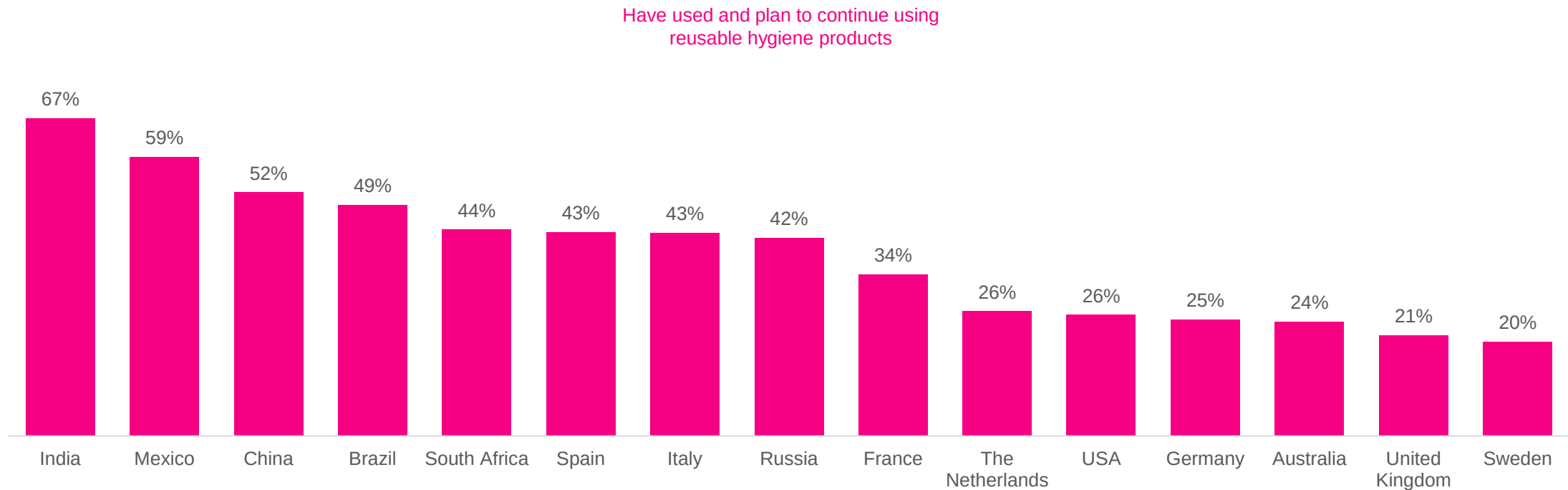
Knowing that the products will actually be recycled



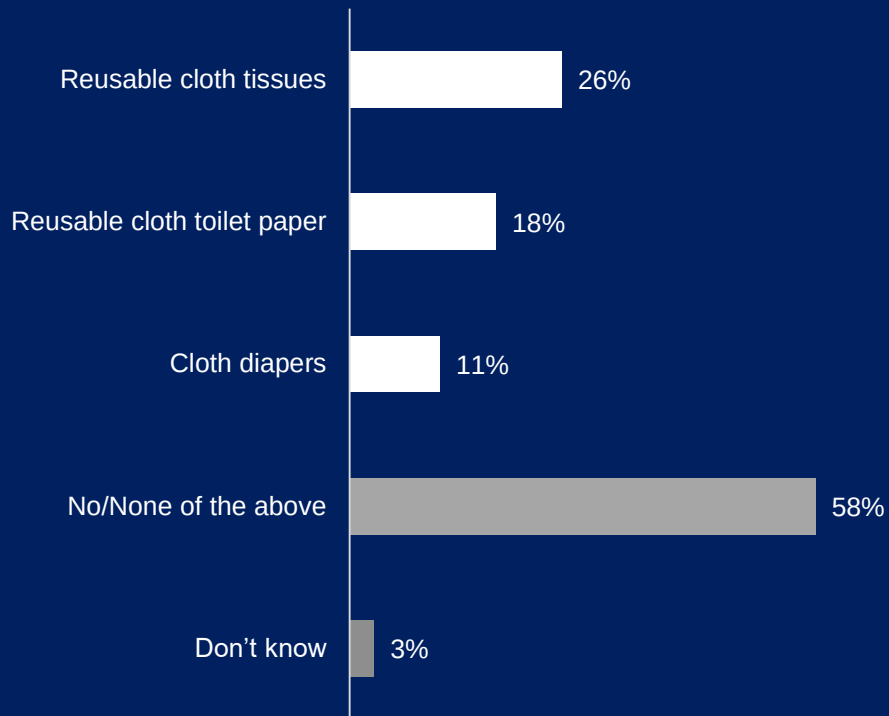
More consistent information about what and how to recycle



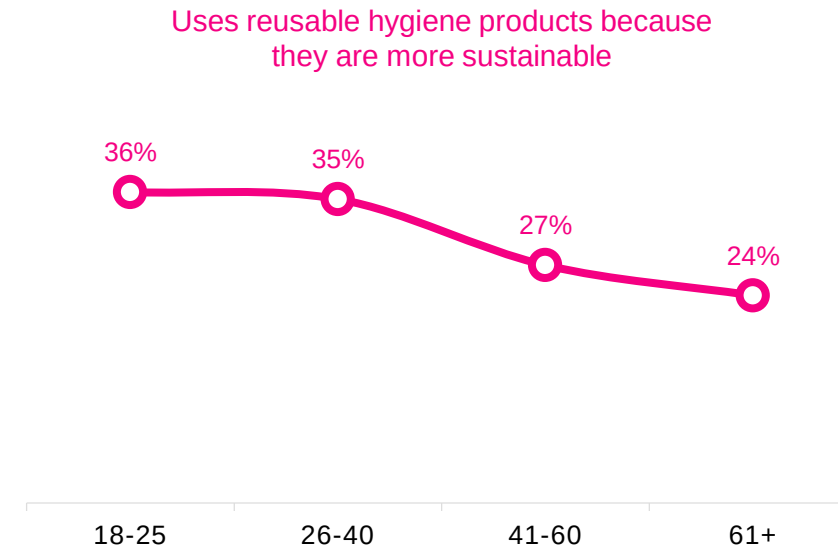
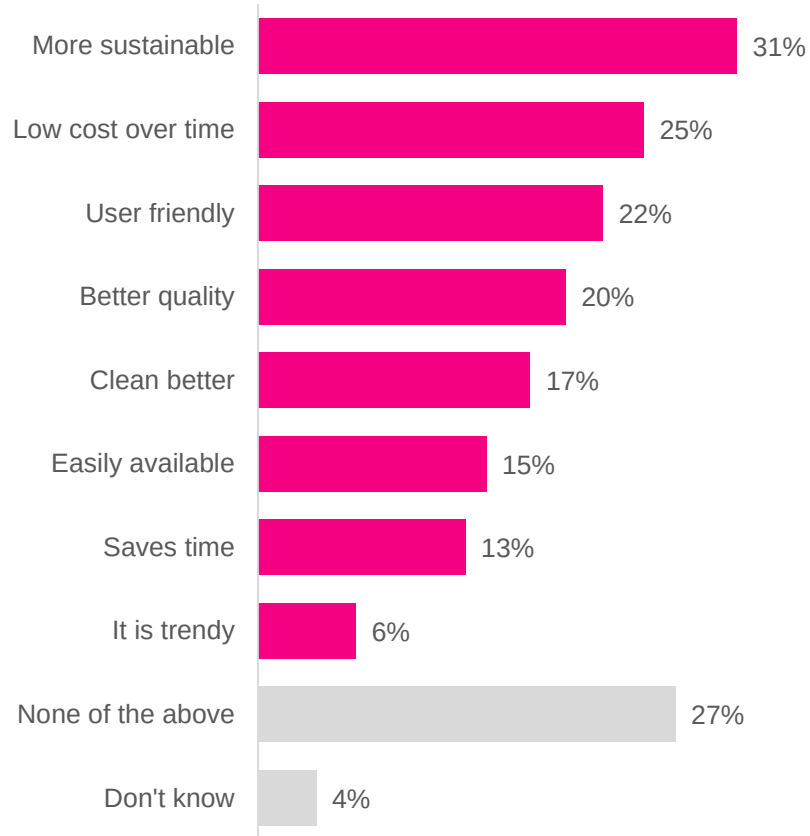
Large differences between markets when it comes to using reusable hygiene products



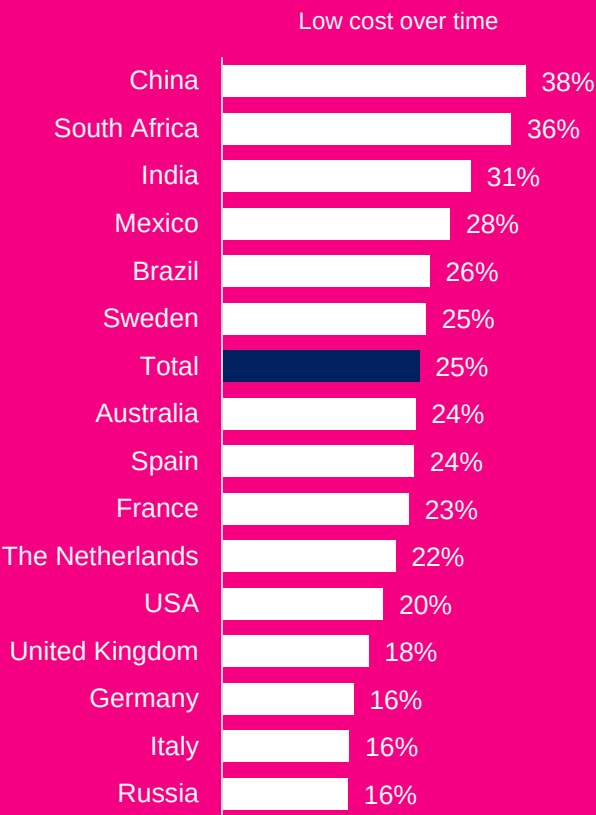
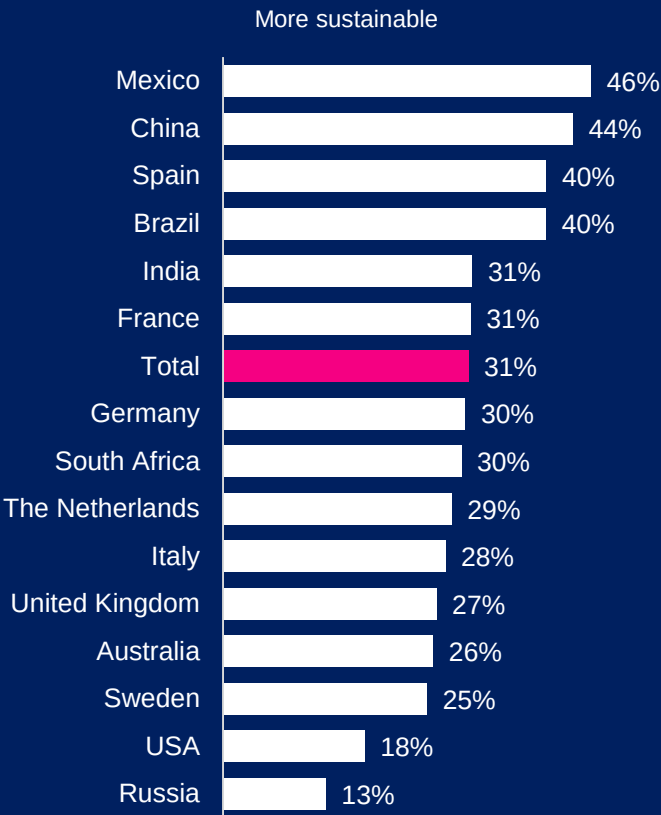
Equally common between genders to have tried reusable hygiene products



Sustainability and cost-in-use are the biggest factors for repurchasing



Sustainability - three times as important in top markets as compared to bottom, low cost twice as important



Background Data

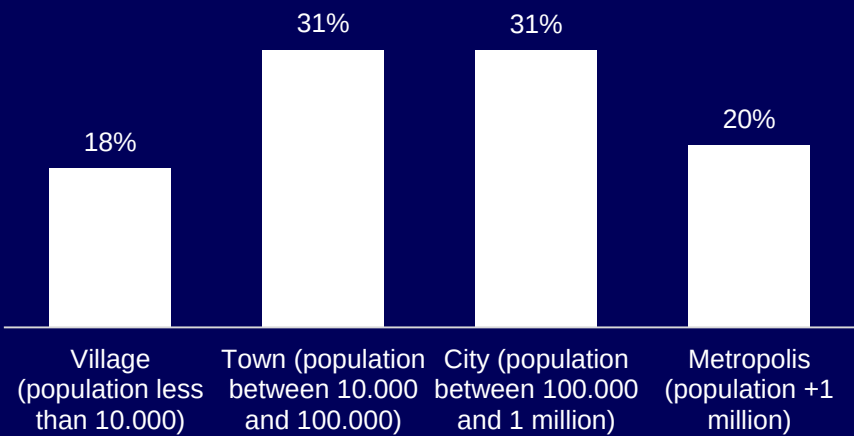
- COVID-19 Survey (data collected July 2020)
- Global Survey (data collected December 2019 - January 2020)

Background variables – COVID-19

Respondents per market

France	1075
Germany	1044
Italy	1049
Mexico	1018
Netherlands	1018
Russia	1043
Spain	1047
Sweden	1009
UK	1035
USA	1031

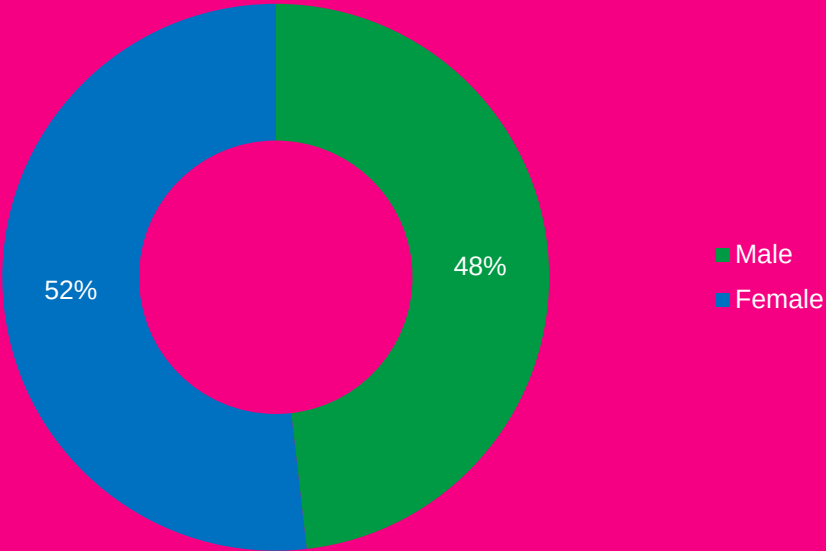
Distribution of city size



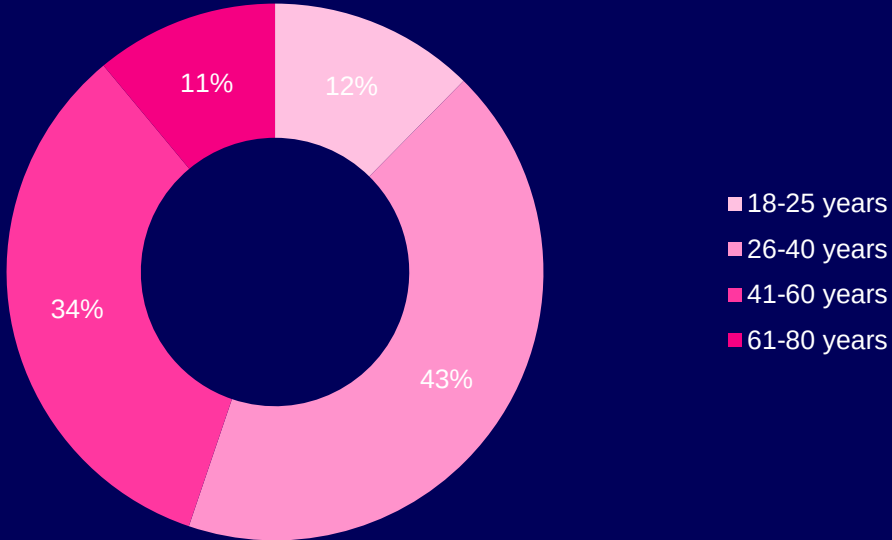
Question: Which of the following best describes the place you live?

Background variables – COVID-19

Gender

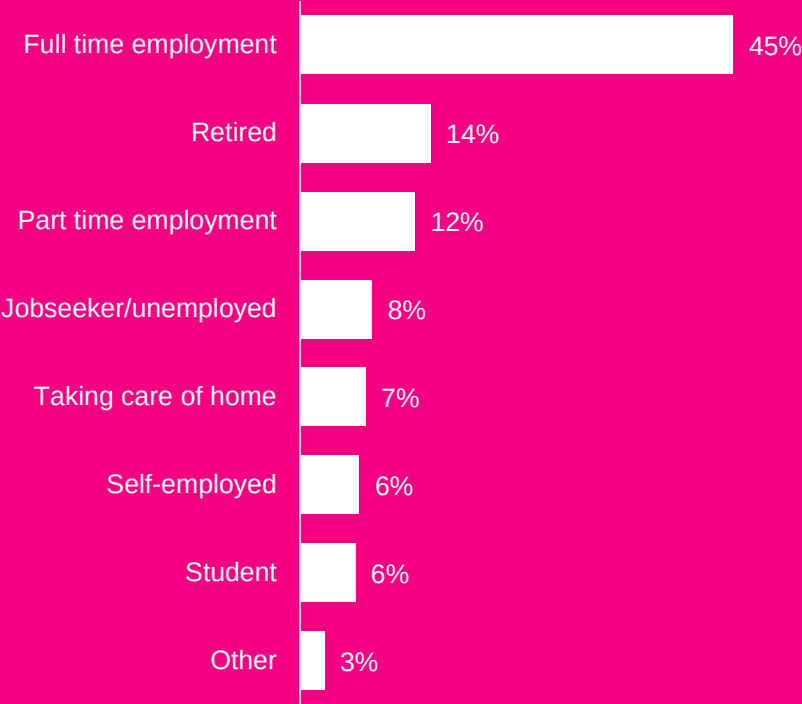


Age



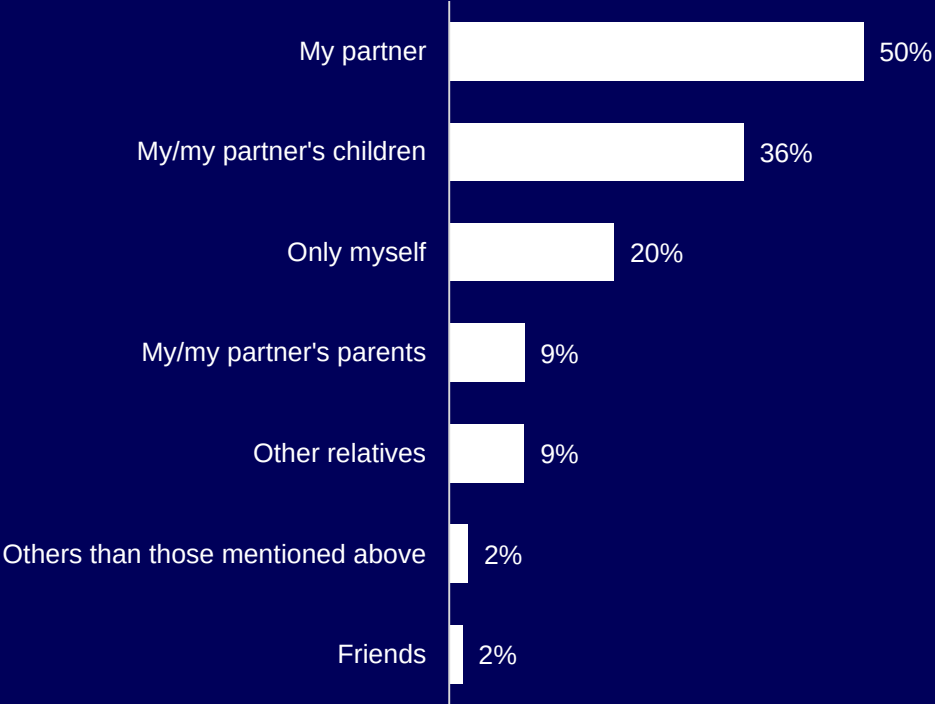
Background variables – COVID-19

Occupation



Q: What is your current occupation?

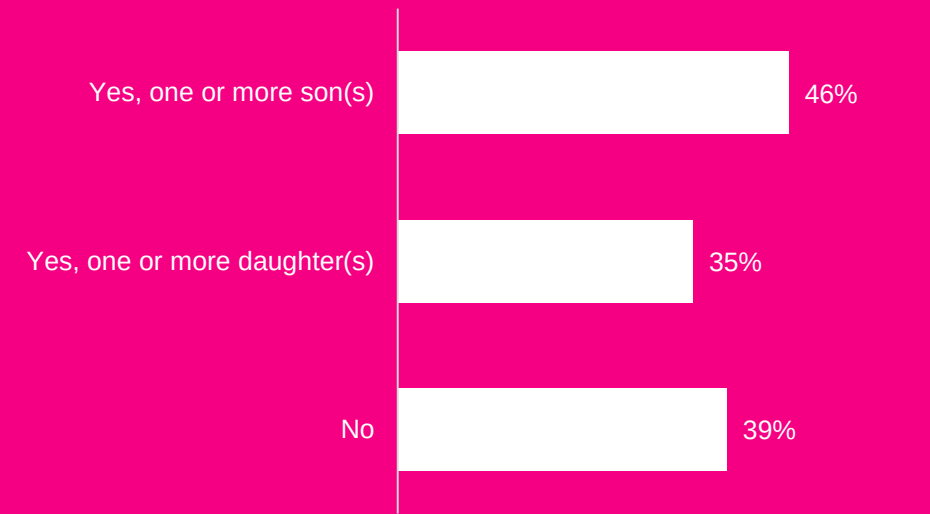
Household



Q: Who lives in your household apart from yourself?

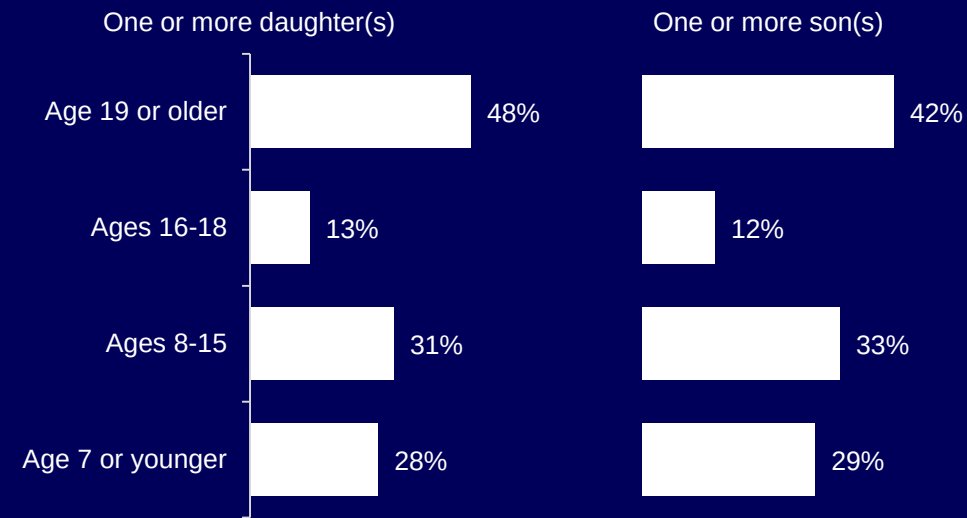
Background variables – COVID-19

Children



Q: Do you have children of your own?

Age distribution among participants' children



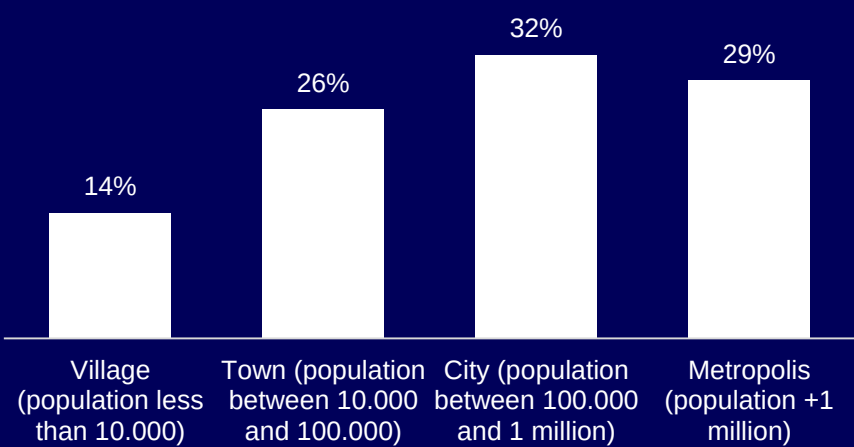
Q: Please indicate if you have one or more children in the following age ranges:

Background variables – 2020 Survey

Respondents per market

Australia	1014
Brazil	1040
China	1067
France	1056
Germany	1009
India	1000
Italy	1030
Mexico	1021
The Netherlands	1011
Russia	1026
South Africa	1017
Spain	1059
Sweden	1014
United Kingdom	1025
USA	1019

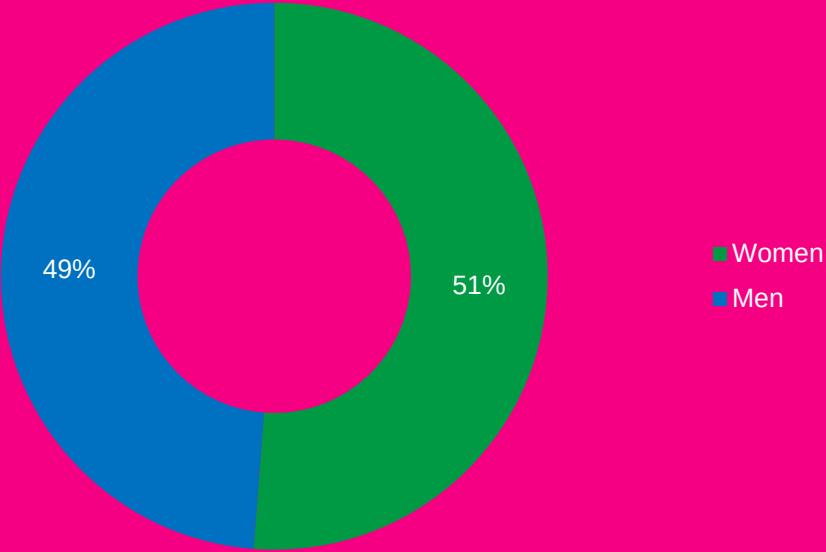
Distribution of city size



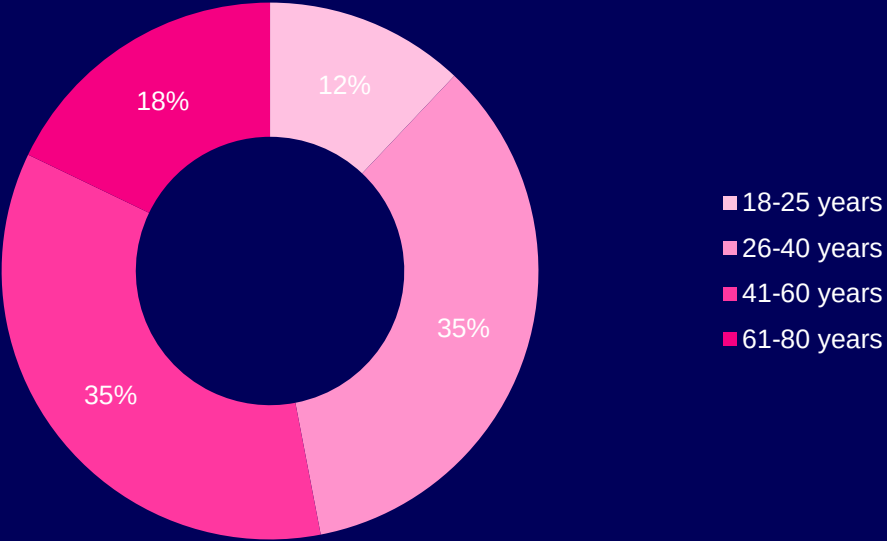
Question: Which of the following best describes the place you live?

Background variables – 2020 Survey

Gender

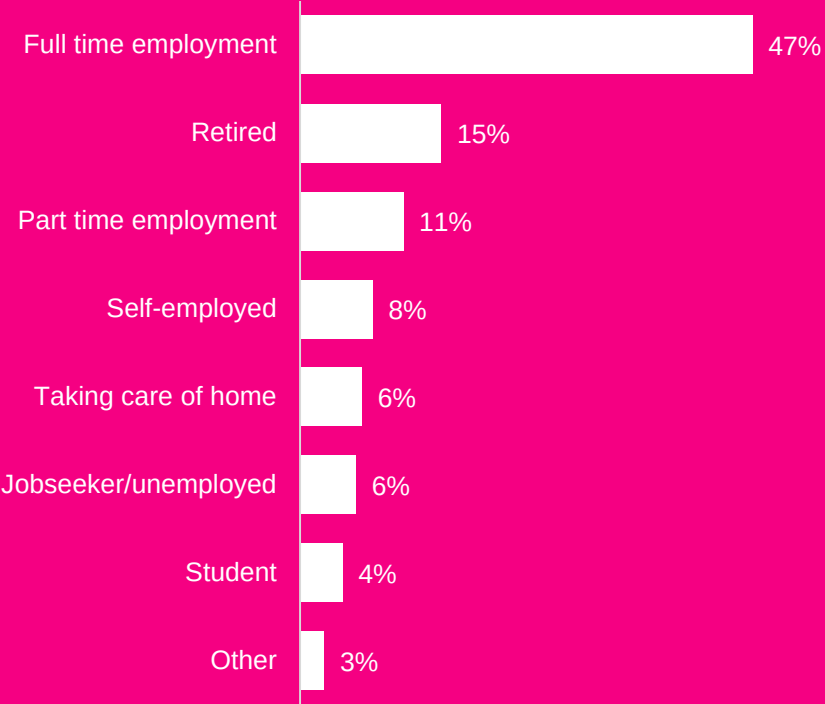


Age



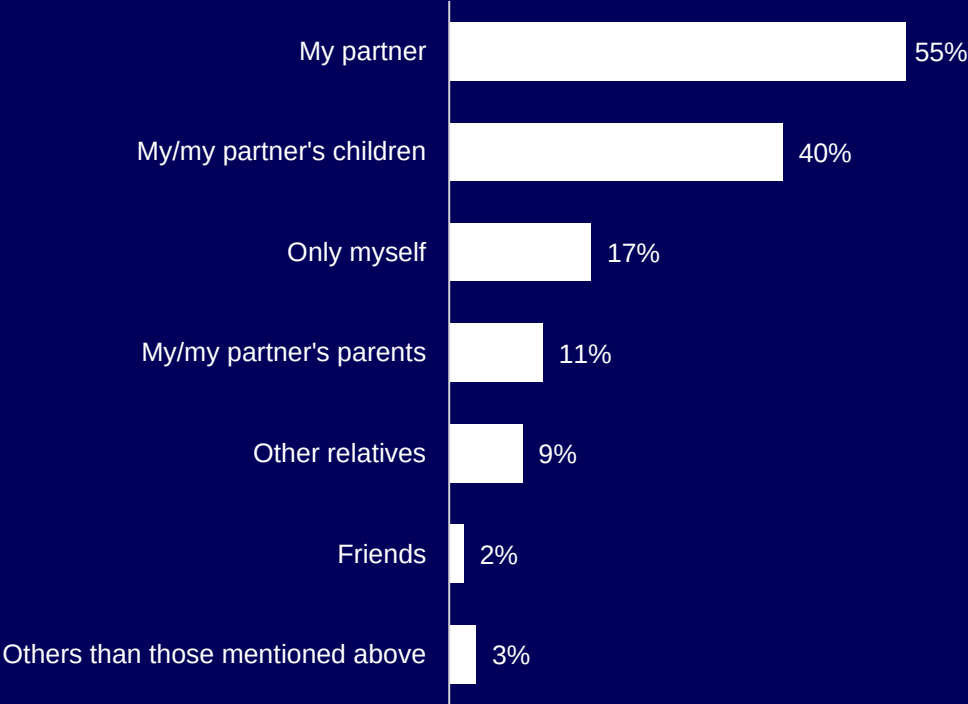
Background variables – 2020 Survey

Occupation



Q: What is your current occupation?

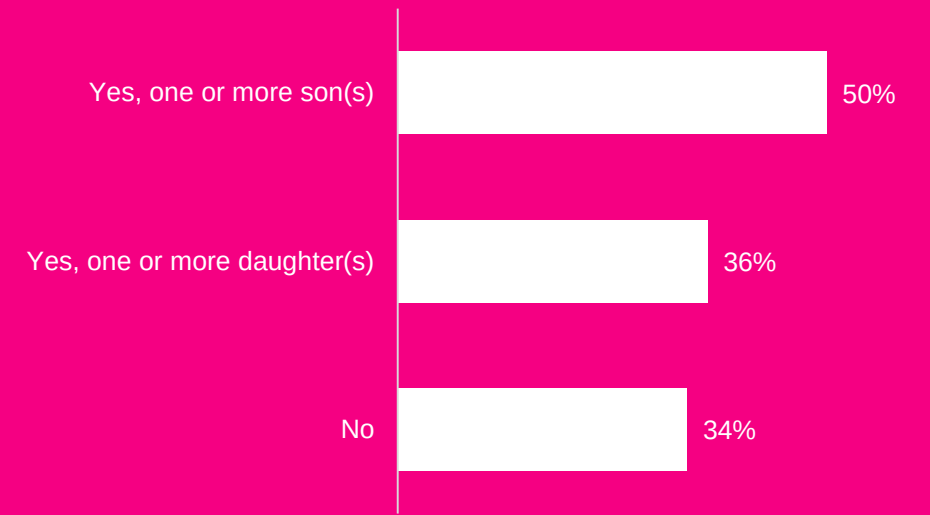
Household



Q: Who lives in your household apart from yourself?

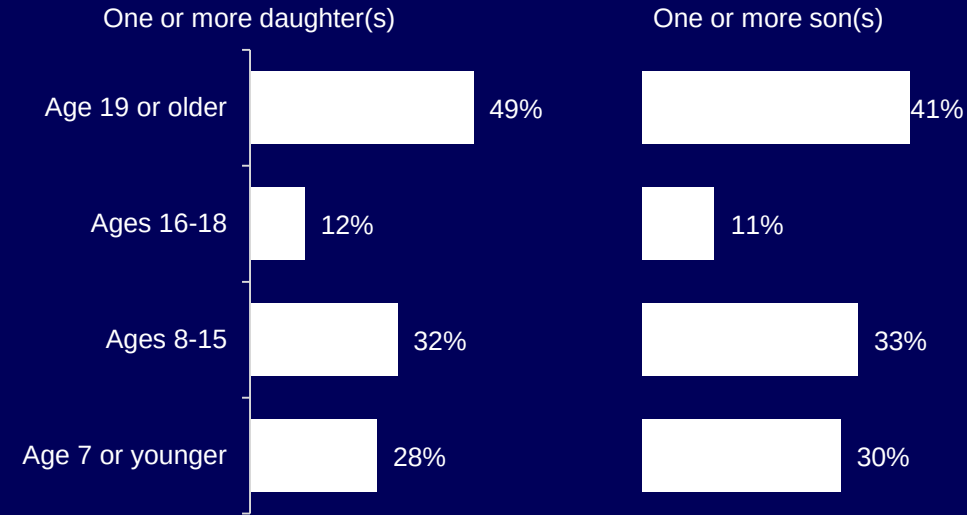
Background variables – 2020 Survey

Children



Q: Do you have children of your own?

Age distribution among participants' children



Q: Please indicate if you have one or more children in the following age ranges:

