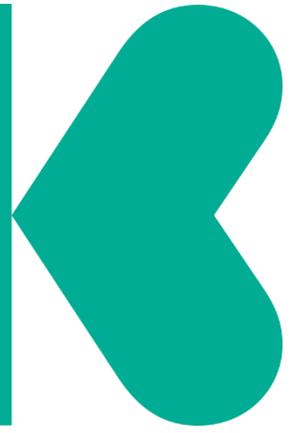




The Kenvue European Self-Care Survey

Executive Summary & Results



Introduction

Self-Care is a central pillar of a modern sustainable healthcare system

Self-care's profound positive impact on the individual as well as the broader health system and society is clear. New data from a survey of 5,000 European consumers commissioned by Kenvue, the makers of LISTERINE®, IMODIUM® and NICORETTE®, reveals the attitudes of European consumers towards self-care and finds that pharmacists could be the key to helping more consumers practice self-care with complete confidence.

The Kenvue European Self-Care Survey conducted by Censuswide confirms that the role of the pharmacist is crucial in modern, sustainable healthcare systems. Pharmacists provide convenient, expert medical counsel as individuals embark on their self-care journeys and this role is valued and trusted by survey respondents.

The vast majority of people in Europe have convenient access to at least one community pharmacy, near to where they live and work. Pharmacies also often have longer opening hours, with some even providing access 24 hours seven days a week. This convenience is heralded by the respondents of the Kenvue European Self Care Survey.

The Kenvue European Self Care Survey also illustrates that if self-care treatments were no longer available, the majority of consumers would visit a doctor instead. This is worrying at a time where there is a significant shortage of healthcare workers. As people manage their minor ailments using over-the-counter medicines, they have less need to see primary care physicians, allowing these medical professionals to focus on more complex cases. The role self-care plays in depressurising the healthcare system should not be underestimated.

At Kenvue, the world's largest pureplay consumer healthcare company by revenue, we believe that self-care is empowering people to take their health into their own hands. Self-care is an essential component of a modern, sustainable healthcare system. The self-care moments we all engage with every day, can have an extraordinary impact on our own health, health systems and society.



About the Kenvue European Self-Care Survey

The research was conducted online by independent research agency Censuswide. 5,007 consumers, aged 18-74, were surveyed between 02 October 2023 and 04 October 2023.

Consumers in the following markets were surveyed:

United Kingdom: 1,002

France: 1,003

Italy: 1,002

Spain: 1,000

Germany: 1,000

Detailed Survey Results

Q1: How confident, if at all, are you in knowing when and how to treat common ailments you might experience?

The vast majority of consumers are confident that they know when and how to treat common ailments. 85% of respondents expressed confidence in their self-care ability. Nearly three in five (59%) describe themselves as 'somewhat' confident while 15% of respondents did not feel confident to treat common ailments.

Q2: Where, if anywhere, do you typically turn for advice on how to treat common ailments? (Tick all that apply)

62% of overall respondents said they would ask a GP/doctor and 42% said they would turn to a pharmacist for advice on how to treat common ailments. Pharmacists are ahead of family and friends (30%), medical or health websites (20%), social media (9%), or online groups and forums (7%) as sources of information.

Q3: Under what circumstances, if any, would you seek advice from a GP/doctor on how to treat common ailments? (Tick all that apply)

Lingering and worsening symptoms and a need for reassurance are top the list of reasons for seeking advice from a doctor or GP. Symptoms having remained longer than usual are cited by 48% of respondents while symptoms being worse than usual being the second most cited circumstance to seek advice from a doctor or GP (44%). Consumers also want reassurance that they aren't suffering from anything serious (30%).

Q4: In the last 12 months, have you chosen to go to a pharmacy instead of visiting the doctor to treat a common ailment, even though a consultation would have been necessary from your point of view?

Half of consumers have chosen to visit a pharmacy instead of a doctor for common ailments in the last 12 months (49%) even if they felt a consultation with a doctor would have been necessary.



Q5: What, if anything, were the reasons for you not visiting the doctor even though a consultation would have been necessary from your point of view? (Tick all that apply)

**Those who have chosen to go to a pharmacy instead of visiting the doctor to treat a common ailment in the last 12 months, even though a consultation would have been necessary from their point of view; N= 2459*

Trust and convenience are the top reasons cited for visiting a pharmacist. Convenience and accessibility are two of the main factors driving consumers to local pharmacists: 28% said they chose to visit a local pharmacist, rather than a doctor, as it was more convenient and 26% said they did so because the next doctor's appointment was too far away.

Q6: How, if in any way, do you prefer to treat common ailments?

European consumers are evenly split on whether they would rather get medicine after a doctor consultation or not. Around half (49%) would mildly or strongly prefer to get medicine after a doctor consultation. 24% either mildly or strongly prefer getting medicine at their own discretion in a pharmacy or in store. 26% have no preference on where to get their medicine.

Q7: Why, if for any reasons, do you prefer getting medicine to treat common ailments at the pharmacy instead of consulting with a doctor? (Tick all that apply)

**Those who selected '-1' or '-2' in Q6; N=1200*

40% of European consumers say they prefer to get medicine from a pharmacist, instead of a consultation with a doctor, because it is more convenient. Similar numbers prefer to get medicine from the pharmacist because they trust the pharmacists' advice and because it saves them time. More than a third (36%) of consumers who prefer to get treatments for minor ailments from a pharmacy said they do so to save doctors' time and more than one in ten (12%) believe it is less expensive for the healthcare system.

Q8: If treatment for minor ailments were only available through your doctor, what, if anything, would you be most likely to?

The majority of respondents (62%) would visit a doctor to get medicine if that was the only option to get treatment for minor ailments. 23% said they would not visit a doctor and instead would try to manage symptoms in other ways, for example using home remedies. 7% indicated they would rather not treat symptoms at all than visit the doctor for a prescription.

Conclusion

Self-care and over-the-counter medicines are a convenient, fair and equitable entry point to healthcare for European citizens and have a profoundly positive impact on the individual as well as the broader health system and society.

The vast majority of people feel confident to manage their minor ailments using over-the-counter medicines. When they do so, they have less need to see primary care physicians, allowing these medical professionals to focus on more complex cases. Lingering and worsening symptoms and a need for reassurance are top the list of reasons for seeking advice from a doctor or GP according to the survey respondents.

The Association of the European Self-Care Industry found that each year across Europe, 1.2 billion cases of minor ailments are self-managed with non-prescription medication. This saves more than €36 billion of expenditure in Europe that would otherwise be borne by patients and national healthcare systems. According to AESGP, without access to self-care, we would need an additional 120,000 doctors or an additional 2.4 hours per GP per day at a time when European countries face severe challenges related to the health and care workforce.

The role of the pharmacist is crucial in modern, sustainable healthcare systems. Individuals know that pharmacists have the skills and training to act as a trustworthy, authentic source of professional expertise in self-care matters. Trust and convenience are the top reasons cited for visiting a pharmacist. Pharmacists play an important role in signposting patients; referring them to the doctor or other appropriate health care professional when medical examination or prescription treatment is considered necessary.

Pharmacists' impact on the health of society is profound as they participate in health promotion campaigns, provide one-to-one advice on how to maintain good health and avoid illness, help those who wish to quit smoking and advise on when self-care, including self-medication, is appropriate.

It is vitally important to ensure access to over-the-counter medicines and maintain self-care as one of the central pillars of a modern and sustainable healthcare system.

