



HEALTH AND HYGIENE IN THE POST-COVID-19 ERA



WHO ARE PROSUMERS?

LAGGARDS

MAINSTREAM

20%-30%
PROSUMERS

INSTIGATORS

PROSUMER
ADOPTION

6-18
MONTHS

A GLOBAL STUDY

31 MARKETS

Australia . Austria . Bangladesh . Belgium . Brazil . Canada . China . Czech Republic .
Denmark . France . Germany . India . Ireland . Italy . Japan . Mexico . Morocco . Norway .
Peru . Philippines . Poland . Russia . Saudi Arabia . Singapore . South Africa . Spain .
Switzerland . United Arab Emirates . Ukraine . United Kingdom . United States

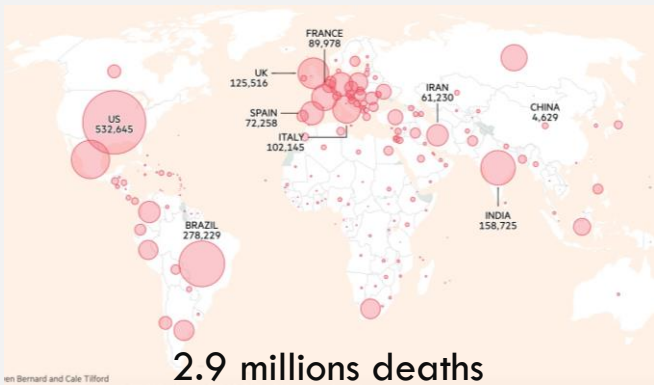
15.300 PEOPLE



**THE WORLD HAS FACED AN
UNPRECEDENTED HEALTH CRISIS**

A GLOBAL EVENT

IN ITS VIOLENCE



IN ITS CONSEQUENCES OVER THE GLOBAL HEALTHCARE SYSTEM



Traumatized and tired, nurses are quitting due to the pandemic

Coronavirus

Italian nurse: 'An experience I would compare to a world war'

Medical staff describe immense pressure and war-like conditions in fight to treat patients

IN THE MOBILIZATION OF THE SCIENTIFIC COMMUNITY



Map of COVID-19 scientific collaboration indexed in the Scopus on the 7th of April 2020
Keywords: "COVID-19", "SARS-CoV-2", "2019-nCoV": 519 articles
Created with Netscity (<https://www.inrl.fr/netscity/prod/>) by Marion Maisonnobe (UMR Géographie-cités - CNRS), JS map by amCharts.

**A GLOBAL AWARENESS
ON THE VITAL NEED
FOR A ROBUST
HEALTHCARE SYSTEM**

92%
PROSUMERS

83%
MAINSTREAM

COVID-19 has underscored that a strong healthcare system is essential to a strong economy.



86/76



91/80



89/75



97/93



90/88



96/87



98/92

A GLOBAL HYGIENE AWARENESS FIGHTING INVISIBLE ENEMIES

83%
PROSUMERS

67%
MAINSTREAM

COVID-19 has heightened my awareness
of and aversion to dirt and germs.



69/40

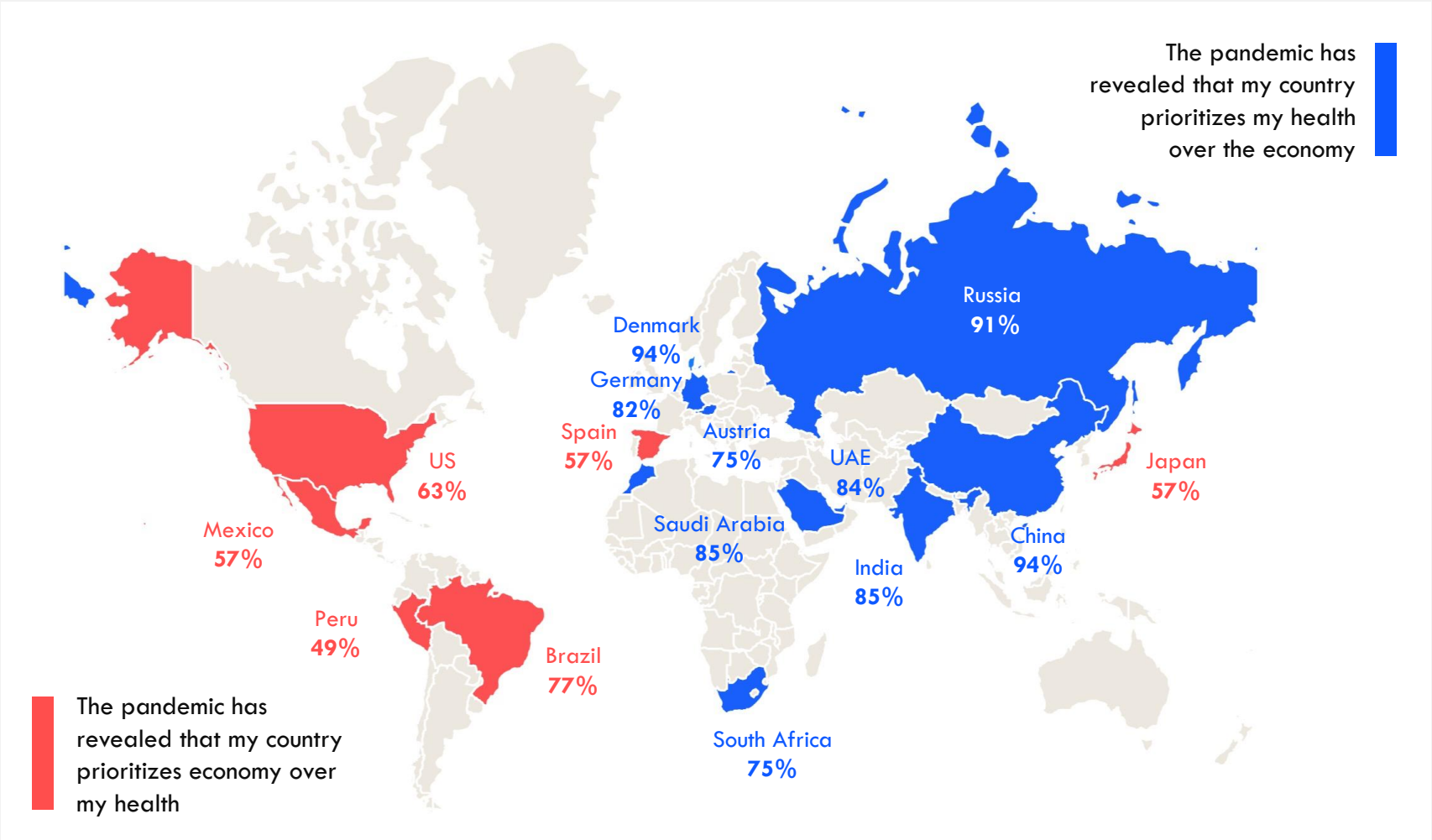


SAME PANDEMIC

DIFFERENT REACTIONS

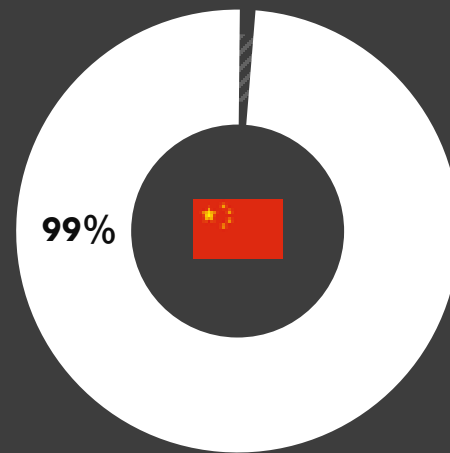
XAS WILL NOT T
ARK of the BEAST (vaccine, c
ID 2020

DIFFERENT
UNDERSTANDING
OF WHERE OUR
PRIORITIES LIE



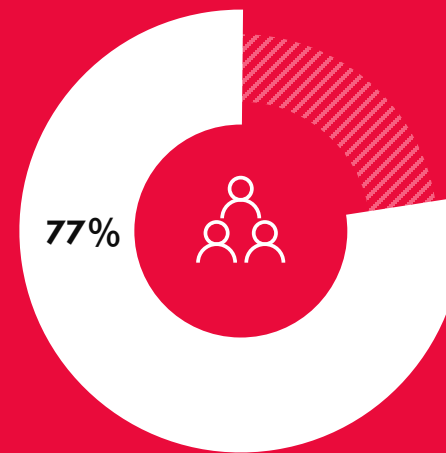
A TRUST SYSTEM NOT ALWAYS OPERATING

“I HAVE FAITH IN
COVID-19 VACCINES”



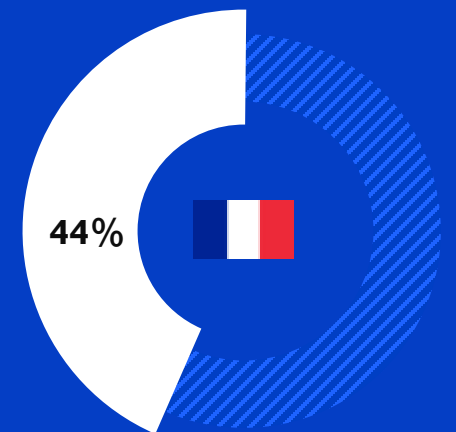
CHINA

“I HAVE FAITH IN
COVID-19 VACCINES”



AUSTRIA

“I HAVE FAITH IN
COVID-19 VACCINES”



FRANCE

IN A NUTSHELL, THE COVID-19 PANDEMIC HAS PUT OUR CULTURAL DIFFERENCES IN THE LIMELIGHT

trust in institutions

collective first

hygiene first

health disruptors

general distrust

individual driven

social connection first

health traditionalists

TRUST



- Trust **fragmented** based on political affiliation
- High emphasis on **individual responsibility**
- Strong faith in **science**



- Strong **trust in institutions**
- High emphasis on **collective responsibility**
- Innovation and **future driven**

INDIVIDUAL

COLLECTIVE



- Strong **distrust in institutions** & pharma companies
- High emphasis on **state support** vs. individual & collective responsibility
- Strong distrust in tech & **science innovation**

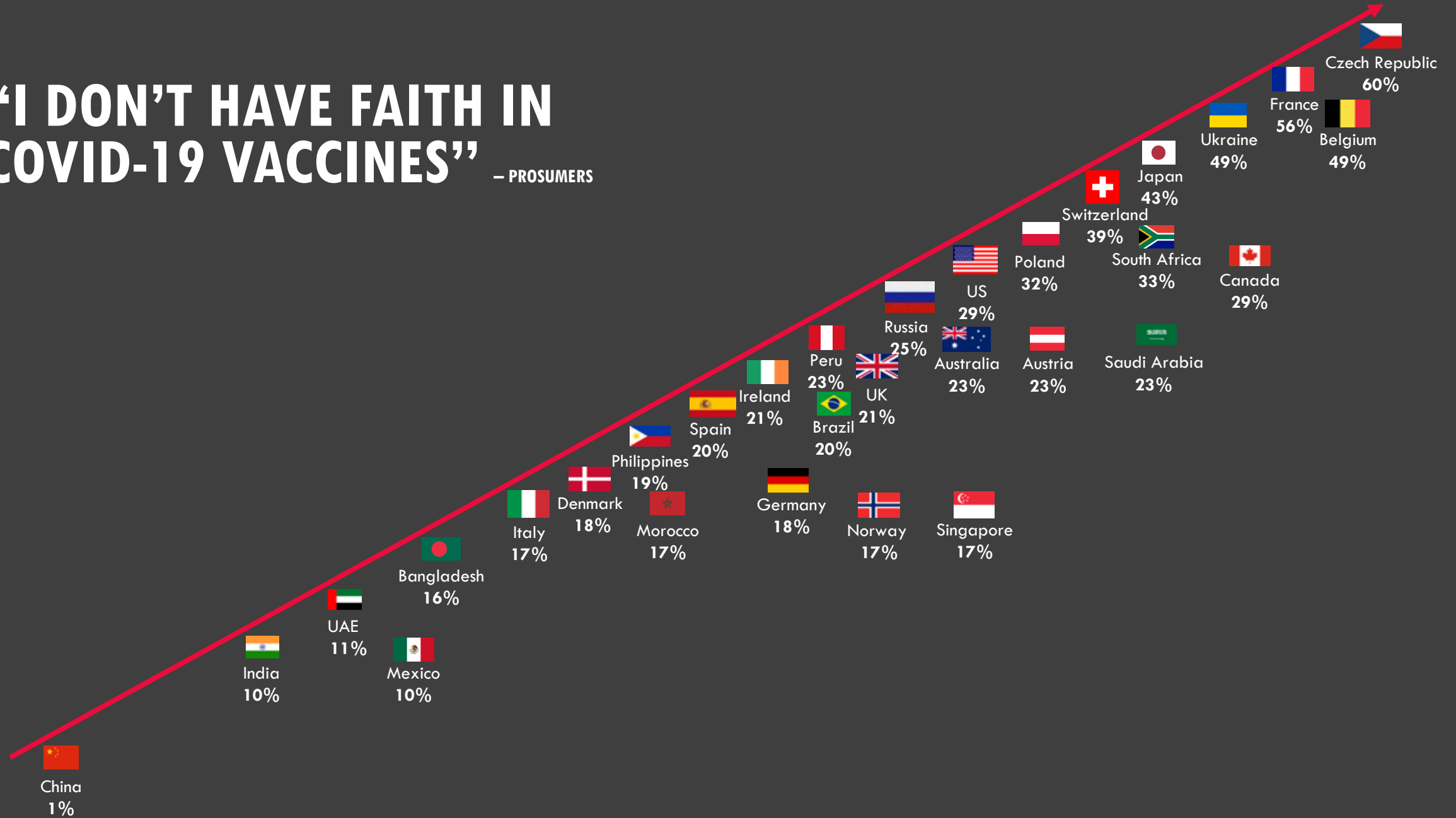
DISTRUST

1 TRUST IS THE GREATEST WEAPON



“I DON'T HAVE FAITH IN COVID-19 VACCINES”

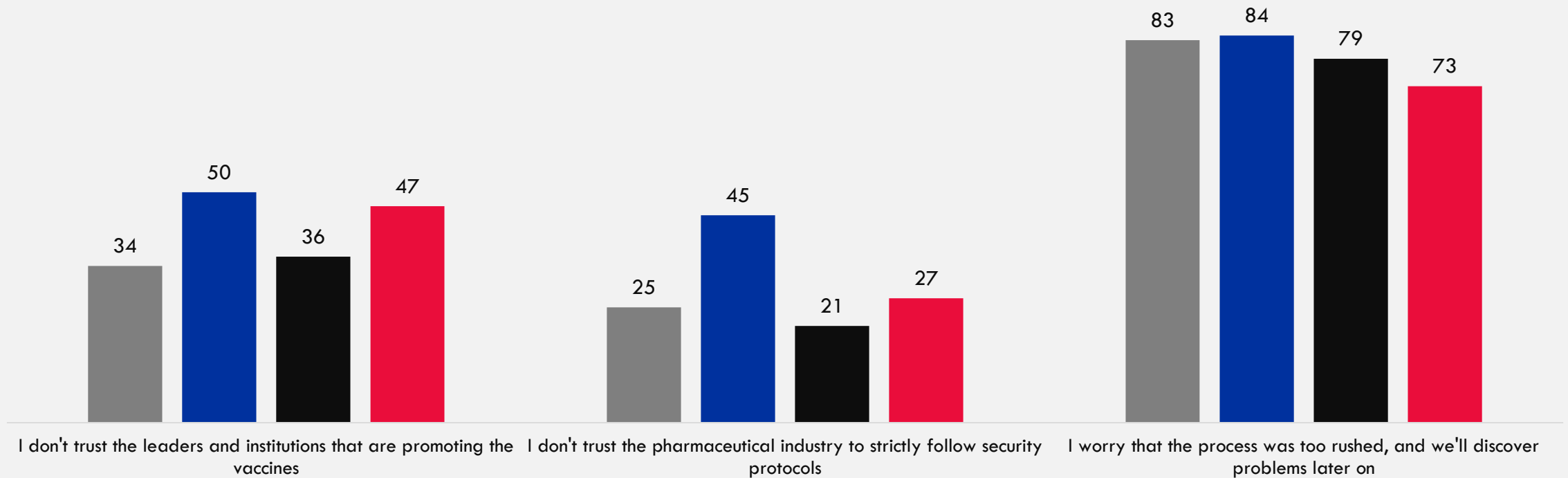
— PROSUMERS



DISTRUST IN VACCINES IS LINKED TO DISTRUST IN INSTITUTIONS

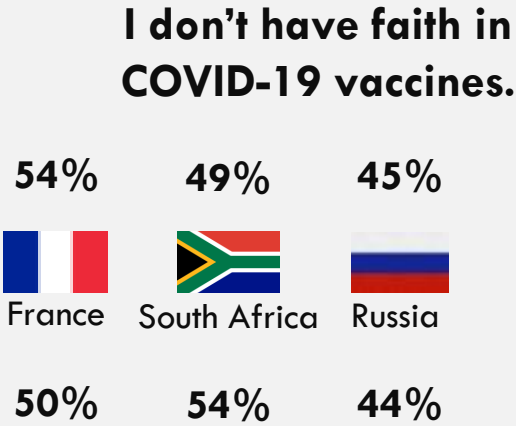
Why don't you have faith in COVID-19 vaccines?

■ Global ■ France ■ US ■ Austria

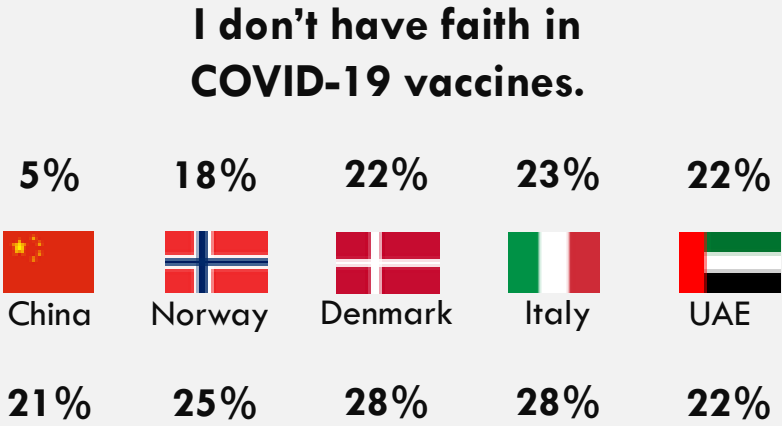


DISTRUST IN VACCINES IS LINKED TO DISTRUST IN INSTITUTIONS

**LOW
FAITH**



I don't trust the leaders and institutions that are promoting the vaccines.



**AVERAGE
FAITH**

I don't trust the leaders and institutions that are promoting the vaccines.

AUSTRIA HAS AVERAGE FAITH IN VACCINES, BUT LOW FAITH IN INSTITUTIONS

I don't have faith in
COVID-19 vaccines.

23%



Austria

47%

I don't trust the leaders and institutions
that are promoting the vaccines.

A RISE OF DISTRUST, SCANDAL AFTER SCANDAL

Contaminated blood scandal



1999

Mediator scandal



Le laboratoire Servier dans la tourmente judiciaire

Une patiente attaque le groupe français qu'elle juge responsable de sa maladie cardiaque.

Par Anne Jouan
Publié le 04/06/2010 à 19:19, mis à jour le 04/06/2010 à 19:20

2010

H1N1 Vaccine distrust



Des médecins antivaccin

Une enquête auprès des professionnels de santé, que nous publions en exclusivité, le montre: ils ne sont pas tous prêts à s'immuniser contre le virus responsable de la pandémie...

A lors que la campagne massive de vaccination antigrippe A se rapproche, plus d'un tiers des personnels de santé hésitent ou refusent carrément la fameuse piqûre. Telle est la révélation du sondage que vient de clore l'Espace éthique de l'AP-HP (Assistance publique-hôpitaux de Paris), dont nous publions les résultats en exclusivité (voir l'encadré).

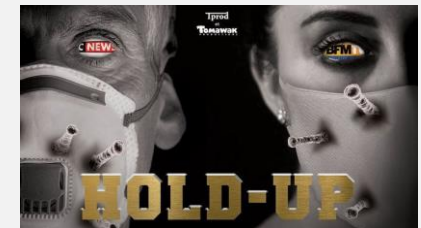
2018

Conspiracy theory



Covid-19 : "Hold-up", le documentaire qui dénonce un "complot mondial", fait polémique

Plusieurs élus politiques et ONG ont sévèrement critiqué ce film sorti mercredi grâce à une campagne de financement participatif.

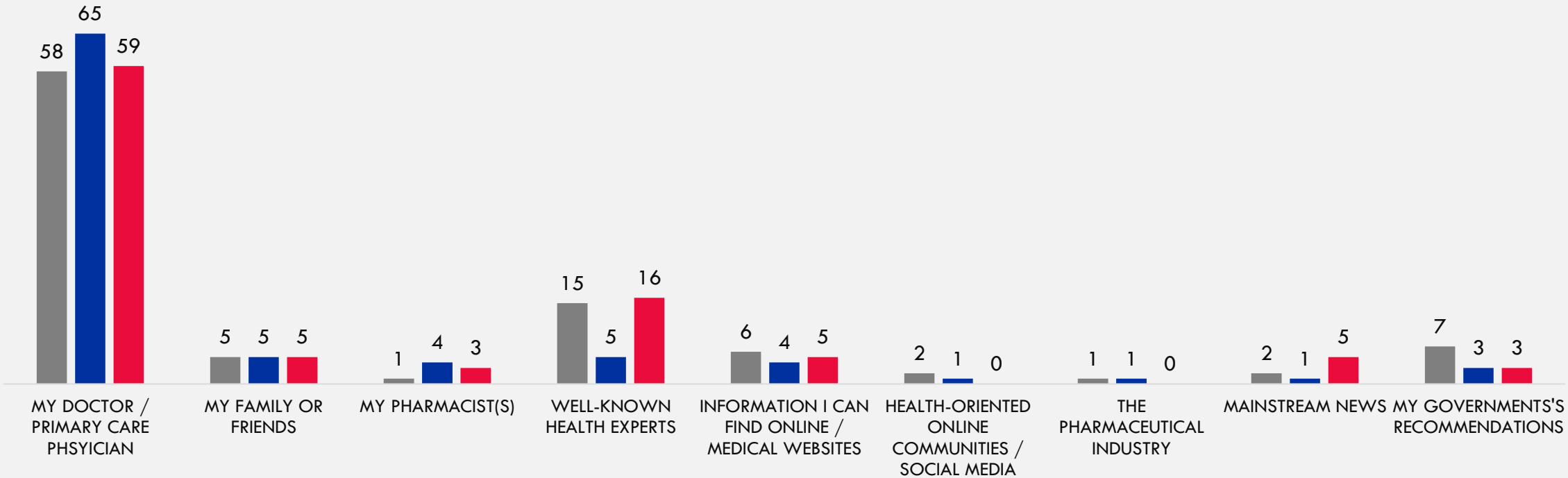


2020

WHEN EVERYTHING FALLS APART, DOCTORS ARE THE LAST TRUSTWORTHY PARTNERS TO RELY ON

When it comes to my health, the source I consider most trustworthy and rely on most is:

■ Global Prosumer ■ French Prosumer ■ Austrian Prosumer

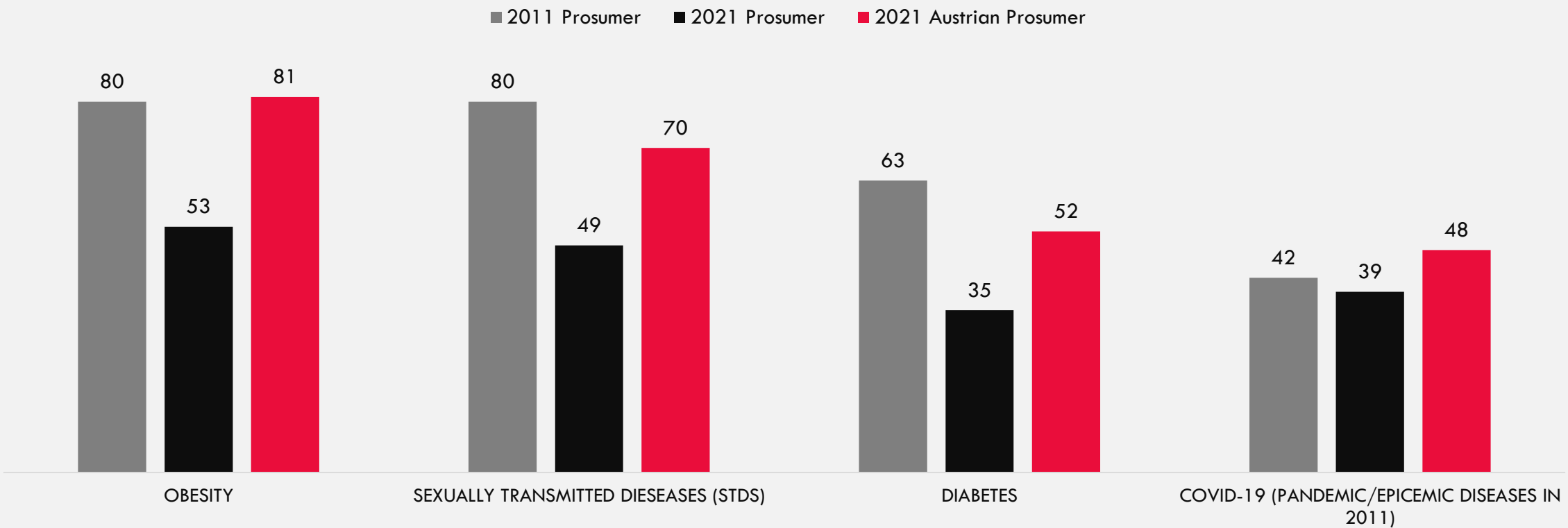


2 SHIFTING FROM INDIVIDUAL TO COLLECTIVE RESPONSIBILITY



DID WE LOSE OUR INDIVIDUAL SENSE OF HEALTH CONTROL OVER TIME?

I have a good deal of control over whether I develop/contract the following diseases/ailments:



EVERYONE AGREES ON COLLECTIVE RESPONSIBILITIES

90%
PROSUMERS

83%
MAINSTREAM

It is everyone's responsibility to avoid contributing
to healthcare facility/system overload.



91/82



83/77



86/78



97/87



96/89



96/87



92/92

BUT WE DISAGREE ON THE SANCTIONS

45%
PROSUMERS

35%
MAINSTREAM

People who don't maintain their health should pay extra for health insurance/healthcare expenses.



47%



27%



51%



53%



30%



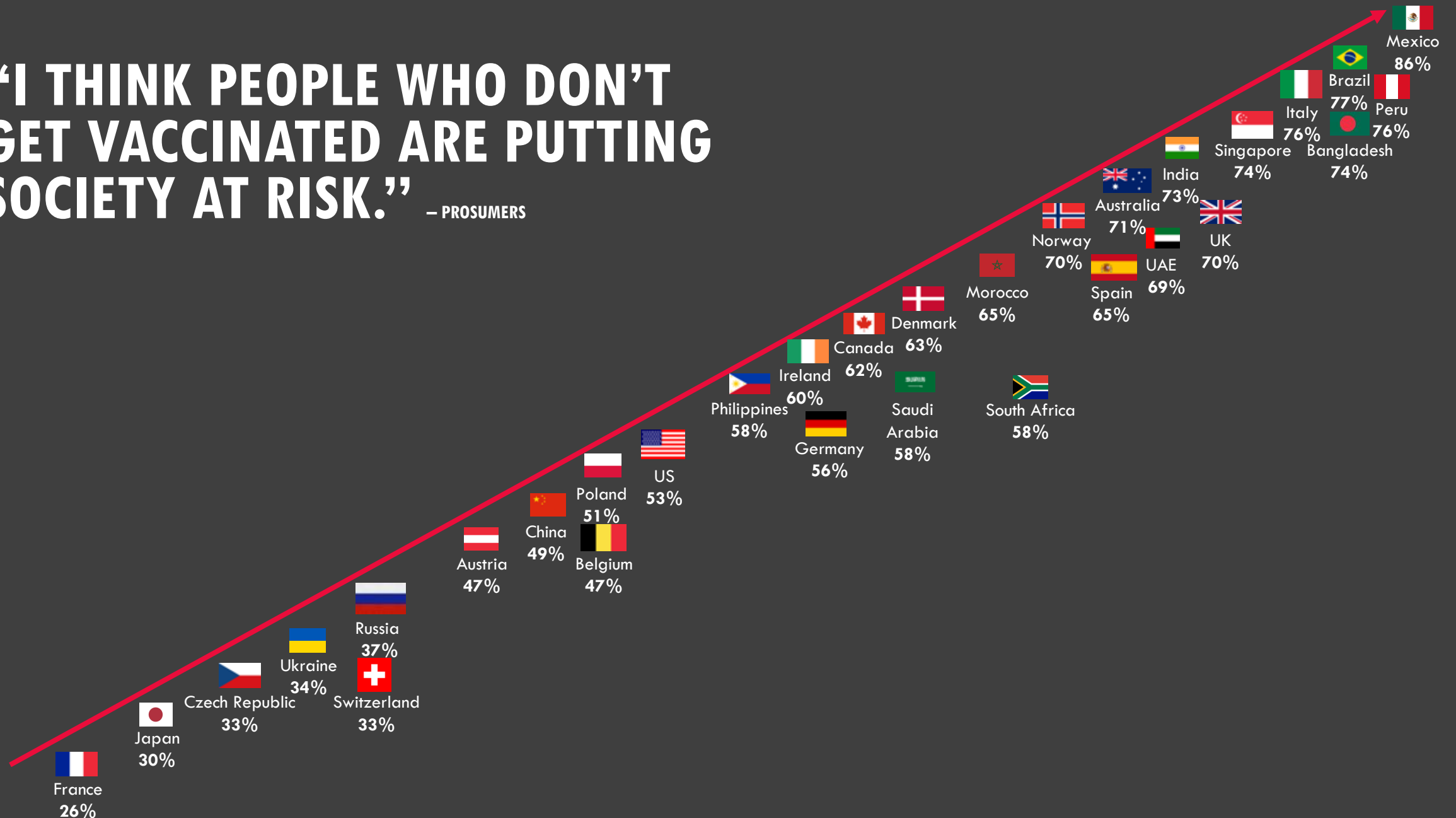
20%



64%

**“I THINK PEOPLE WHO DON’T
GET VACCINATED ARE PUTTING
SOCIETY AT RISK.”**

— PROSUMERS



**DOES NOT GETTING
VACCINATED MEAN
MORE CONSTRAINING
MEASURES?**

22%
PROSUMERS

19%
MAINSTREAM

I think people who don't get vaccinated shouldn't return
to their normal lives/should remain quarantined.



17/14



14/13



28/21



22/9



33/31



40/38



28/32

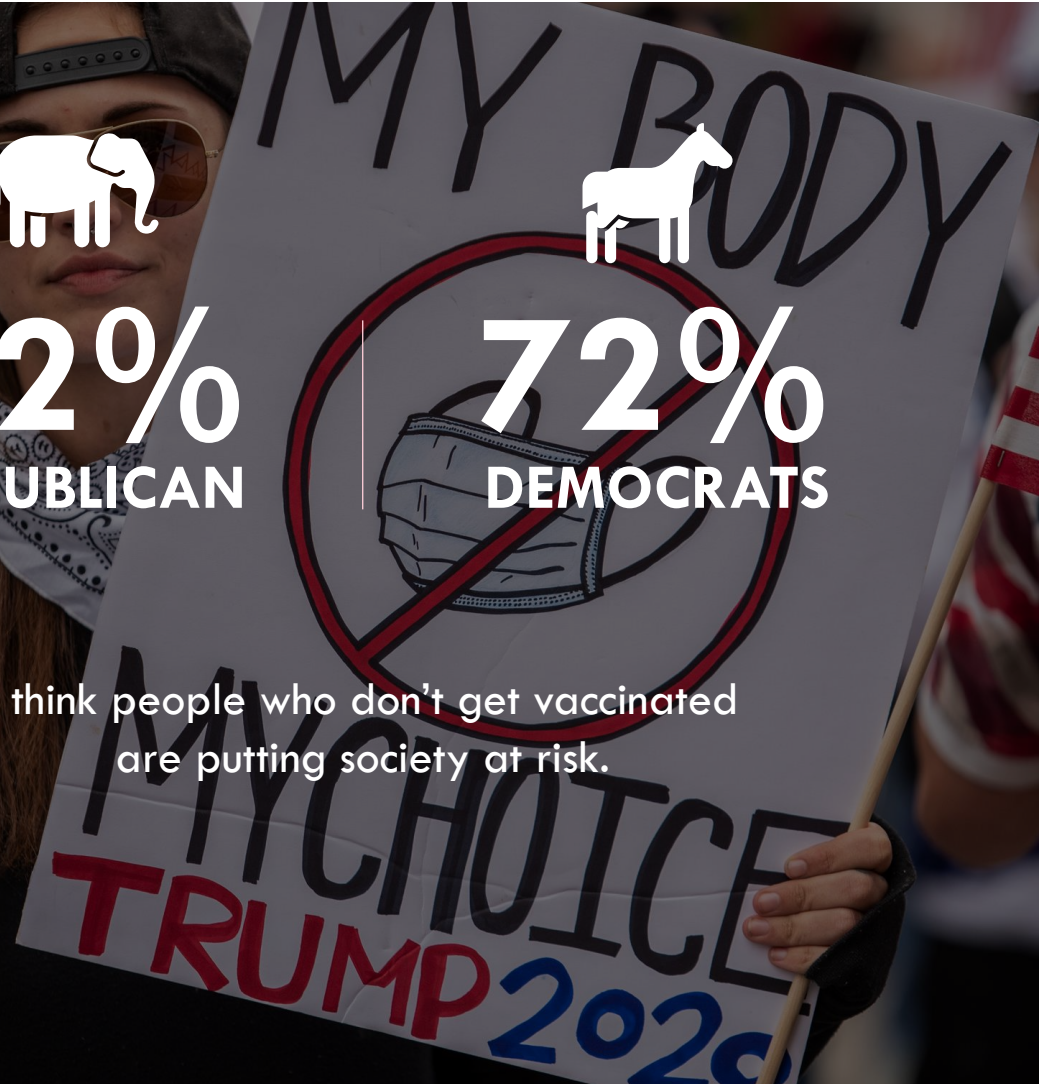
POLITICS FIRST

FACTS LATER


42%
REPUBLICAN


72%
DEMOCRATS

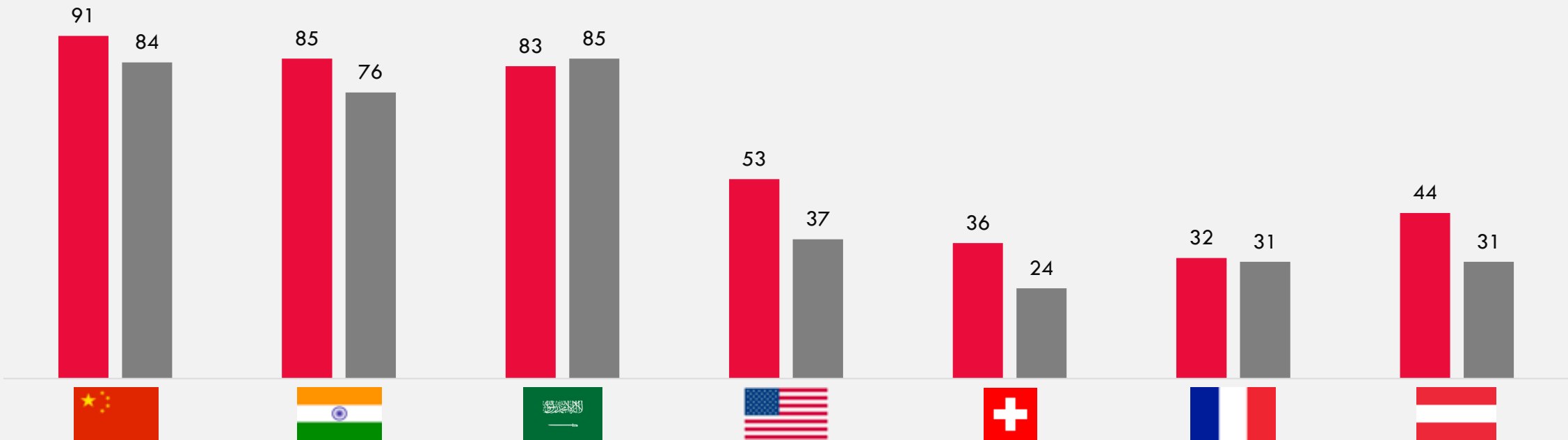
I think people who don't get vaccinated
are putting society at risk.



COLLECTIVE MINDED VS. INDIVIDUAL DRIVEN

To help prevent widespread collective disease, I'm willing to support my government/healthcare authorities by sharing personal information

■ Prosumer ■ Non-Prosumer



3

**WHAT SACRIFICES
ARE WE WILLING TO
MAKE FOR THE SAKE
OF HYGIENE?**



WE'VE ALL BECOME HYGIENE FREAKS

87%
PROSUMERS

79%
MAINSTREAM

When it comes to our lifestyles today, I think strict hygiene is essential to our personal health.



85%
PROSUMERS

70%
MAINSTREAM

Even after the pandemic, I will pay more attention to keeping a clean home as part of my regular health regimen.



HYGIENE IS OUR NEW SHIELD TO FACE THE OUTSIDE WORLD

68%
PROSUMERS

55%
MAINSTREAM

When we are past the pandemic, I will pay more attention to the cleanliness of stores, restaurants, public transportation, etc.



50/37



49/43



74/59



85/71

63%
PROSUMERS

47%
MAINSTREAM

The pandemic has made me realize that people who've always been cleaning obsessed were justifies in their approach to personal hygiene and home maintenance.



33/24



64/36



68/50



68/50

FEAR COUGHING ATTACKS

53%
PROSUMERS

48%
MAINSTREAM

In the future, I will feel more anxious around
people coughing in closed spaces.



41/24



50/45



59/57



70/59



68/55



55/48



70/65

A NEW TENSION WITH HYGIENE

80%
PROSUMERS

66%
MAINSTREAM



42%
PROSUMERS

40%
MAINSTREAM

The pandemic has made me realize that proper cleaning requires sanitizing/sterilizing.



48/44



67/45



85/70



95/85

I fear the COVID-19 pandemic is creating new forms of hygiene anxiety.



31/36



58/44



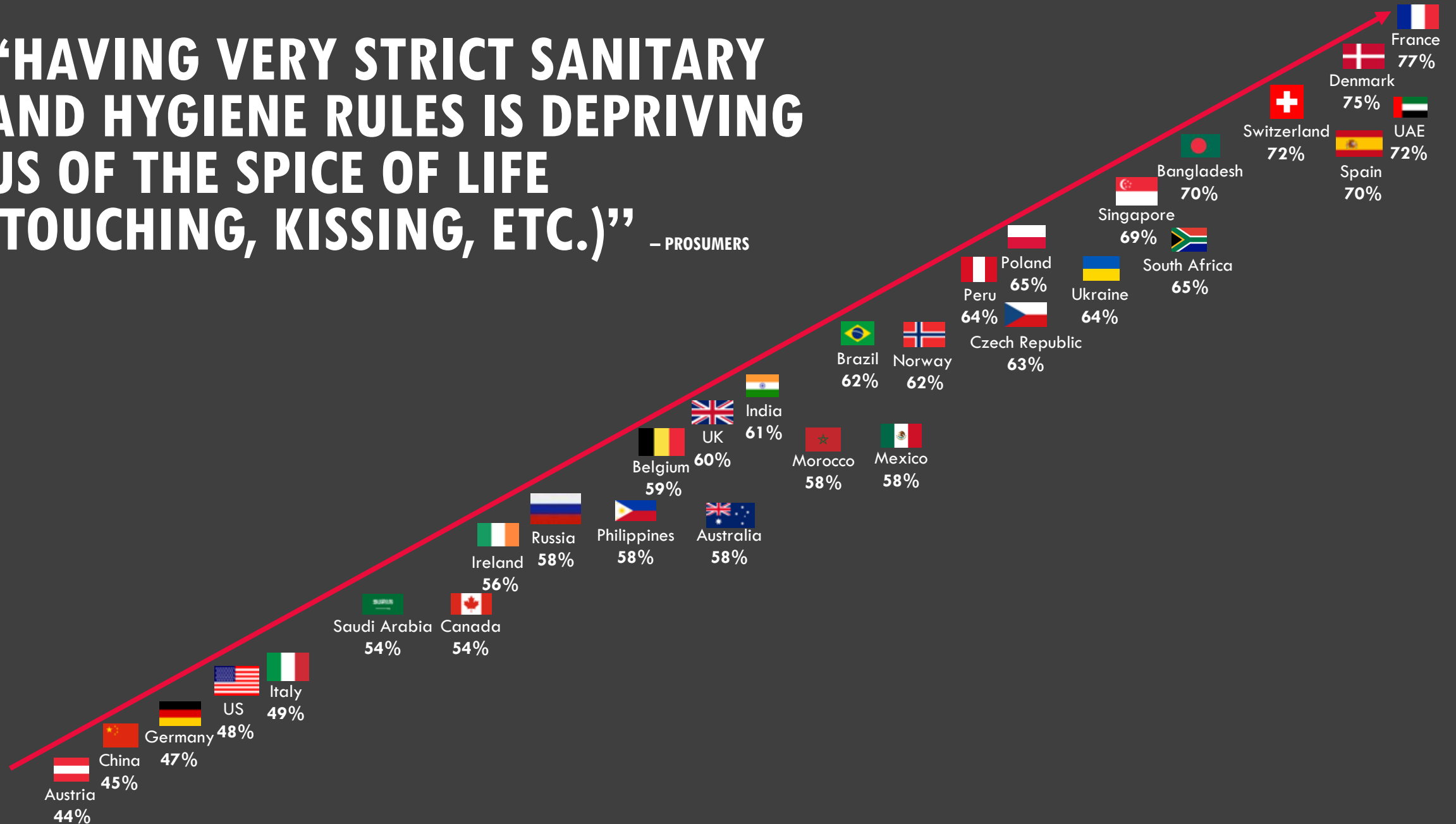
35/40



34/31

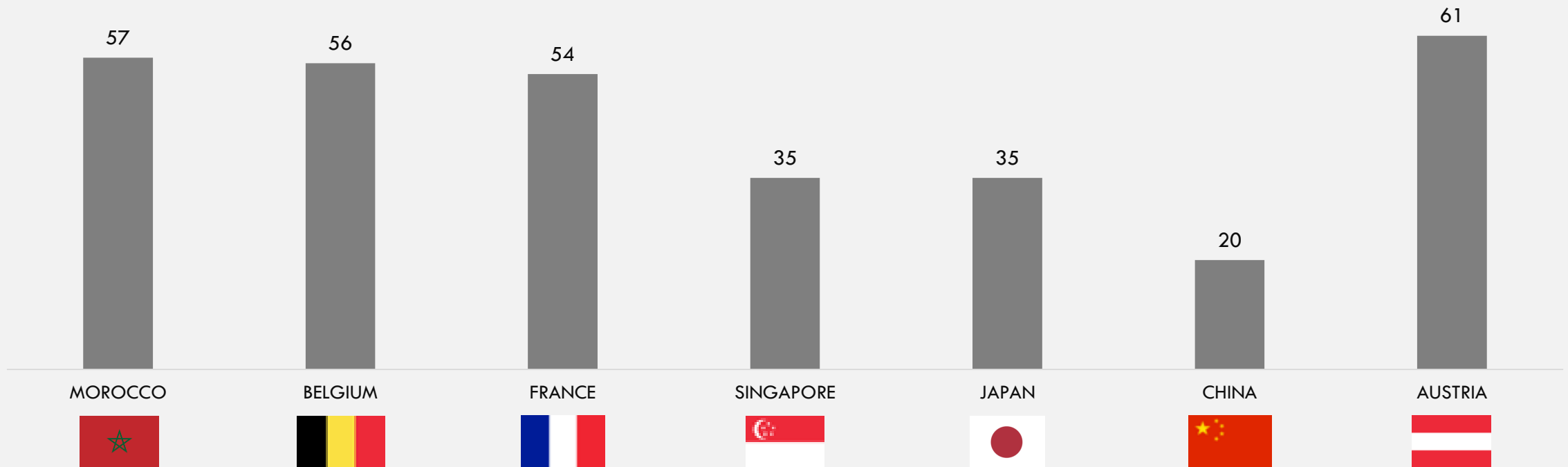
“HAVING VERY STRICT SANITARY
AND HYGIENE RULES IS DEPRIVING
US OF THE SPICE OF LIFE
(TOUCHING, KISSING, ETC.)”

— PROSUMERS



THE FEAR OF SOCIAL DISCONNECTION IS CONTINGENT ON CULTURE

Which of these consequences of the COVID-19 pandemic worry you?
As a society, we are losing our sense of interconnectedness.



PEOPLE ARE READY TO EMBARK ON A JOURNEY OF CHANGE, BUT THEY NEED HELP ALONG THE WAY

61%
PROSUMERS

47%
MAINSTREAM

Following the pandemic, I expect my favourite brands to be more focused on supporting my health and wellness.



34/36



47/35



62/47



87/69

76%
PROSUMERS

58%
MAINSTREAM

Compared with before COVID-19, I'm now willing to spend more time and money on maintaining a perfectly cleaned home.



57/44



77/54



91/81

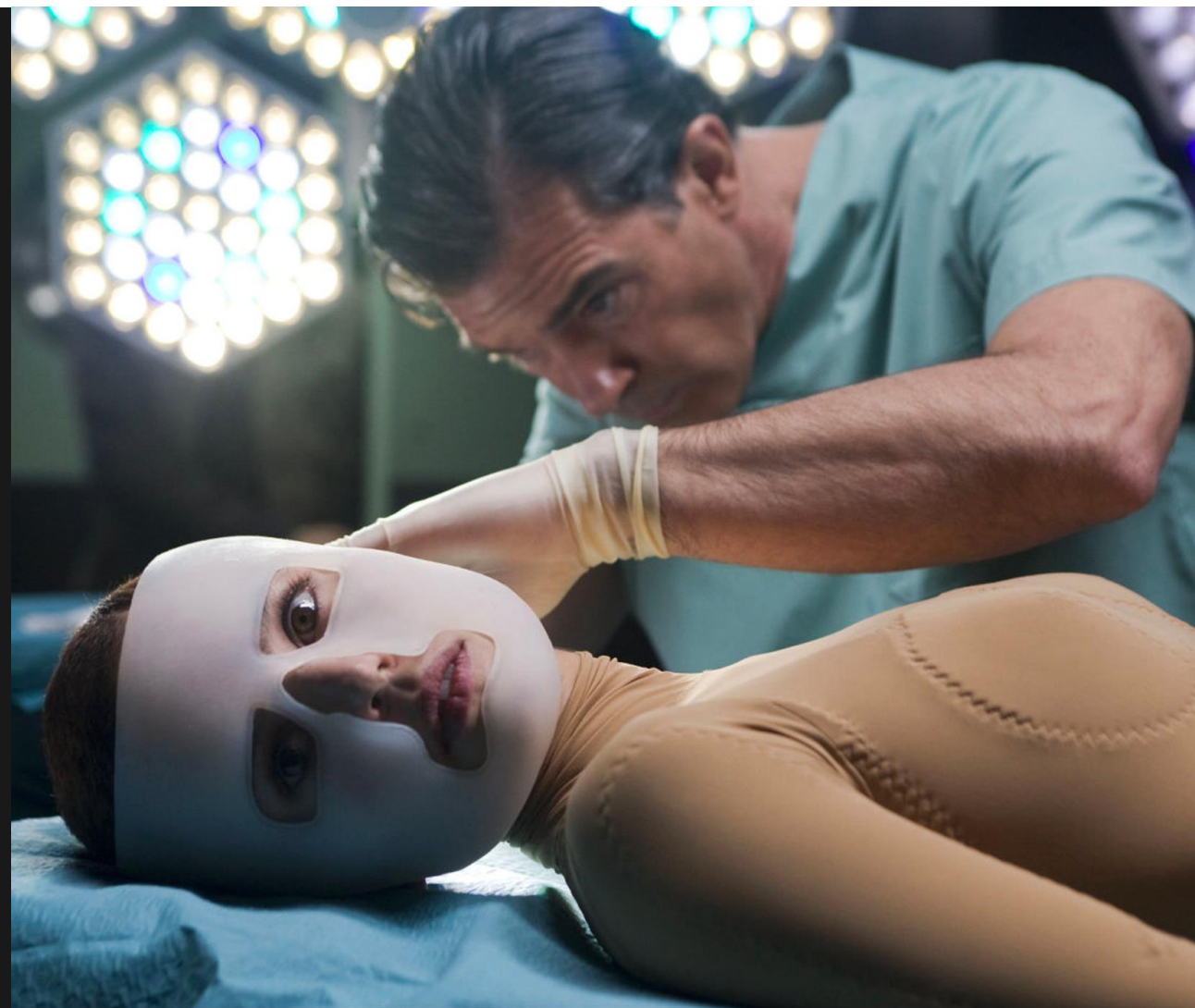
THE JOURNEY OF CHANGE



THE JOURNEY OF CHANGE – IN AUSTRIA



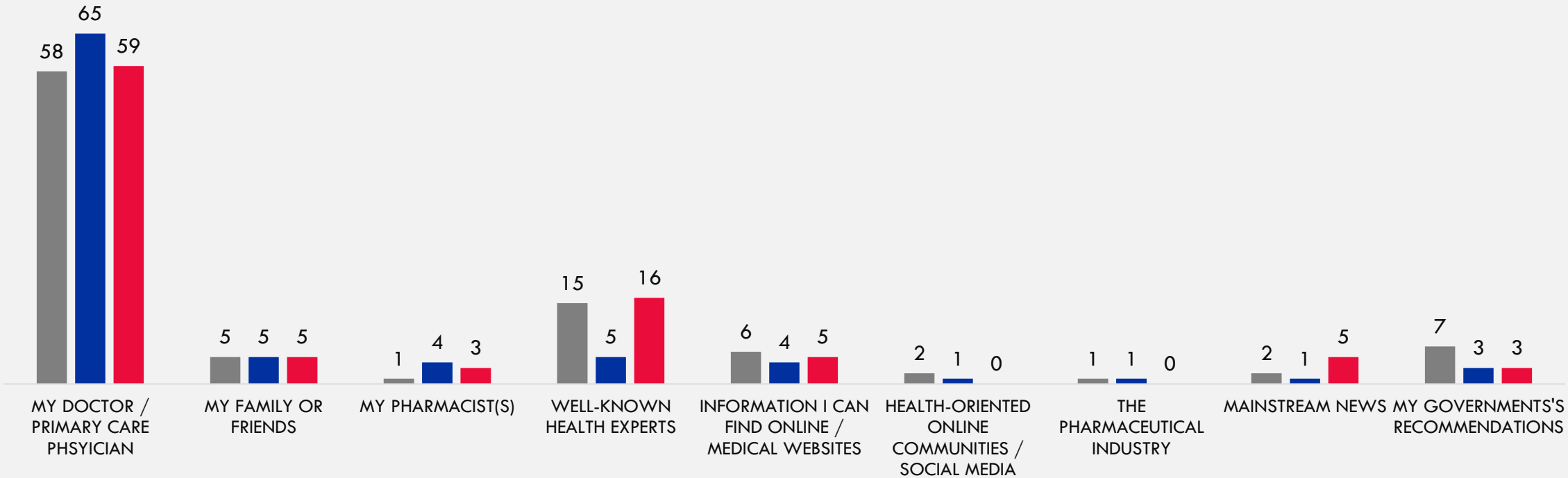
4 HEALTH FORWARD



WHEN EVERYTHING FALLS APART, DOCTORS ARE THE LAST TRUSTWORTHY PARTNERS TO RELY ON

When it comes to my health, the source I consider most trustworthy and rely on most is:

■ Global Prosumer ■ French Prosumer ■ Austrian Prosumer



BUT WE'D LIKE "OLD-SCHOOL" PHYSICIANS TO UPDATE THEIR PRACTICES

60%
PROSUMERS

54%
MAINSTREAM

Doctors are better at prescribing drugs than they are at listening to people and helping them adopt a treatment that is exactly right for them.



56/43



51/44



58/54



51/40



65/56



62/71



70/72

**WE WANT THEM TO
BECOME OUR
HEALTH COACHES**

76%
PROSUMERS

59%
MAINSTREAM

In the future, I expect my doctor to behave more like a health coach . Paying attention to my overall physical and mental wellness rather than just coping with illnesses and disease.



69/40

**COACHING STARTS
WITH AN ACCURATE
KNOWLEDGE OF MY
RECORDS**

65%
PROSUMERS

66%
MAINSTREAM

To have an accurate diagnosis, I think it's important
that my doctor: Knows my health record and family
history.



56/56



71/72



61/72



70/68



58/70



58/68



66/62

**A SHIFT IN PRACTICES:
BACKED BY DATA & TECH, OR NOT?**

THE CONFLICT OF TWO WORLDS

HEALTH TRADITIONALISTS

HEALTH DISRUPTORS



THE CONFLICT OF TWO WORLDS

HEALTH TRADITIONALISTS



healthcare tradition

data wary

wearable devices

bio-ethic philosophy



HEALTH DISRUPTORS



healthcare transformation

Big Data enthusiasts

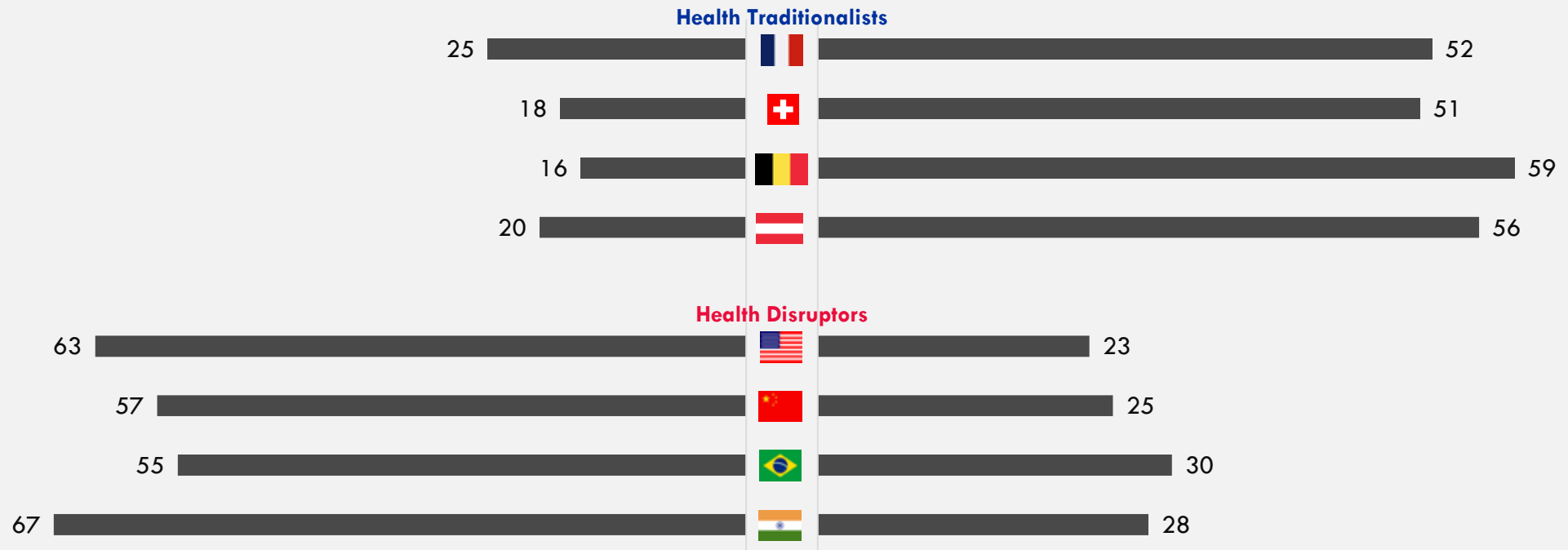
integrated devices

DNA editing apology

HEALTHCARE TRADITION VS. HEALTHCARE TRANSFORMATION

I intend to use more telehealth services after the pandemic

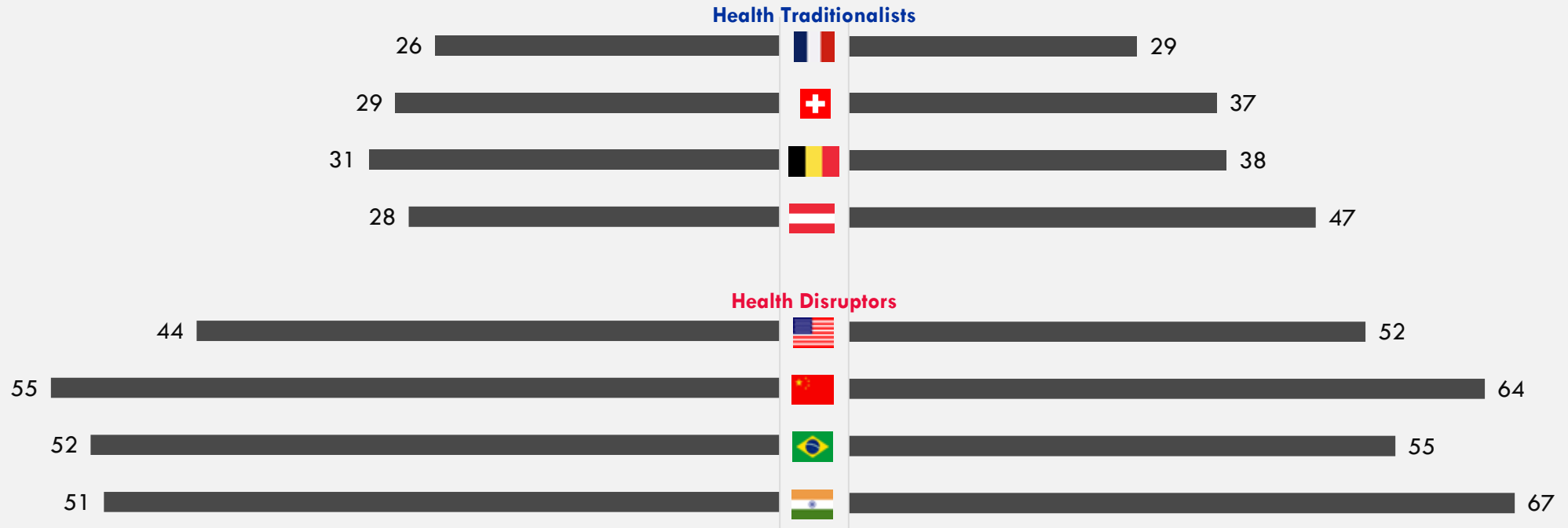
I think telemedicine will dehumanize the relationship between patient and doctor



DATA WARY VS. DATA ENTHUSIASTS

The use of "big data" in medicine will: Provide tailored treatments for each patient

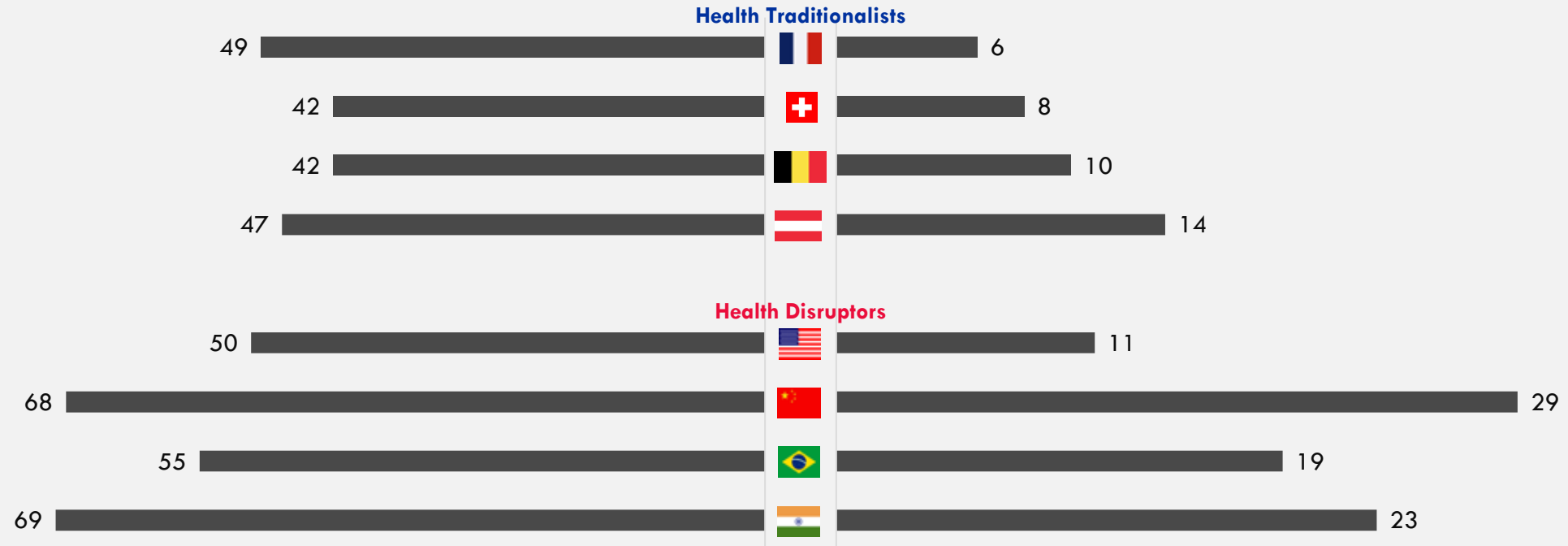
The use of "big data" in medicine will make it easier to identify risk factors and prevent diseases from developing



EVERYONE AGREES ON WEARABLE DEVICES, BUT NOT ON INTEGRATED ONES

I would be willing to share the data from my health-tracking devices with my doctor

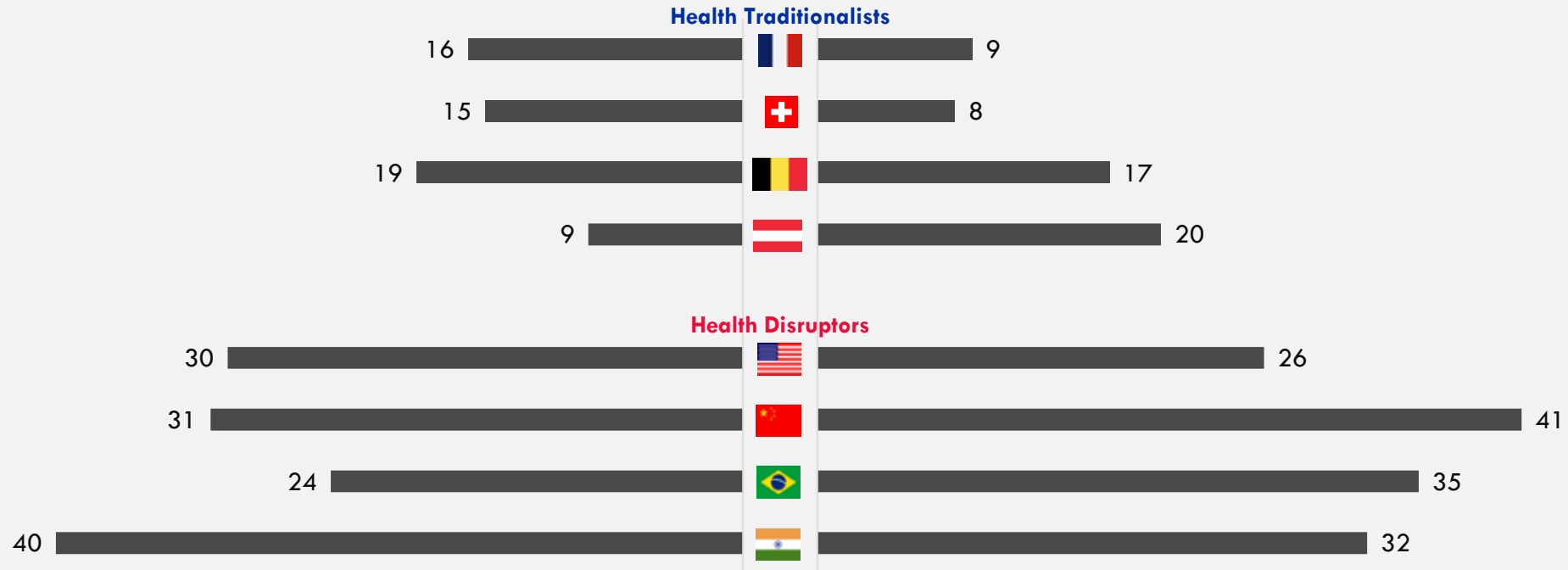
I would be willing to implant a microchip in my body to help manage my health



BIO ETHIC PHILOSOPHY VS. DNA EDITING APOLOGY

I think legalizing gene therapy/gene modification
would be good for society

I would be willing to edit my DNA to protect my
children from potential diseases



A woman with brown hair tied back is shown in profile, looking upwards and to the left. She is wearing a black headset with a microphone boom. The text "IKEA II" is printed in white on the side of the headset. A white, hand-drawn style waveform graphic runs horizontally across the bottom of the image. The background is a solid, light gray.

WHAT'S NEXT?

WILL BIG TECH JEOPARDIZE BIG PHARMA?

42%
PROSUMERS

26%
MAINSTREAM

I think advances in health will be led by
Amazon, Google, and other tech giants.



25/22



32/17



48/26



73/48



46/20



52/31



69/56

FOR TECH COMPANIES, TRUST REMAINS THE ACHILLES HEEL

18%
PROSUMERS

12%
MAINSTREAM

I would have more trust in a drug or vaccine coming from Google or Apple as opposed to a pharmaceutical company.



0/3



15/9



24/17



21/20



14/7



19/11

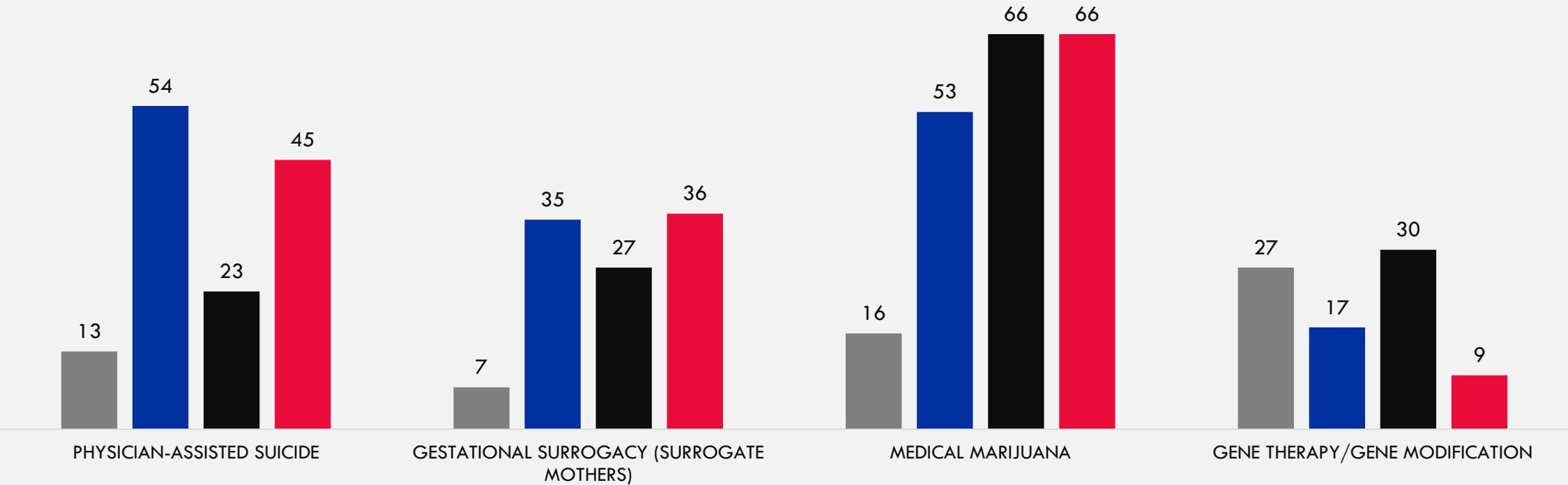


40/42

WAYS FORWARD

I think legalizing these methods would be good for society:

■ China ■ France ■ US ■ Austria



NEW FACTORS DRIVING THE HEALTH CATEGORY



Trust in science

When navigating uncertain times, the advice of scientists helps me the most

58%

23%

22%

Faith in progress

The use of "big data" in medicine will make it easier to identify risk factors and prevent diseases from developing

70%

36%

52%

47%

Openness to new technologies

I would be willing to edit my DNA to protect my children from potential diseases

49%

6%

26%

20%

Openness to vaccine

Do you have faith in COVID-19 vaccine

99%

44%

71%

77%

Collective vs. Individual

In the future, I would like to know whether people I meet are vaccinated against COVID-19

63%

21%

48%

36%

A close-up photograph of a hand being washed with soap suds. The hand is positioned diagonally across the frame, with fingers slightly spread. The skin is covered in thick, white, bubbly foam. The background is a plain, light gray. The lighting is soft, highlighting the texture of the soap and the contours of the hand.

HEALTH AND HYGIENE IN THE POST-COVID-19 ERA