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# GENERATION Z: THE FUTURE OF HEALTH AND WELLBEING BEHAVIOURAL DIFFERENCES BETWEEN GENERATIONS

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# FOREWORD

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Our mission is to inspire healthy decisions. And bringing about real behaviour change in health requires a deep understanding of our audiences, which is why, at Pegasus, we place so much importance on asking the right questions, and unlocking the right insights to build our communications strategies upon.

It's the focus of our dedicated Strategy & Insights team, who use market-leading tools, techniques and data to gather as many rich insights as we can about the people we're trying to reach.

For us, there's one audience raising a lot of questions at the moment – Generation Z. Born between the mid-1990s and early 2000s (aged between 16 and 23), these young people have never known a time before mobile phones and the internet.

As our youngest generation of voters, they live in politically polarised times, full of uncertainty and 'fake news'. And as the country's most tech-literate adults, they access their information through diverse, immediate channels and platforms.

But what do they think about their health? What steps do they take to maintain it? How do they access health care and advice? And what impact does their social and political environment have on their health and wellbeing?

These were just some of the questions we asked in our qualitative and quantitative research. We also took the opportunity to ask the same questions to Baby Boomers to see just how different – or similar – their behaviours were.

The findings that follow give you a taste of what we've learnt and what that means for you. And if this research intrigues you as much as it did us, then get in touch to see how Pegasus can help you unlock the potential of this emerging – and exciting – generation.

Corrina Safeio  
*Director, Strategy & Insights*

\*Online quantitative survey of 1000 respondents (split 500 Generation Z and 500 Baby Boomers) conducted by 3GEM Research and Insights in October 2018 on behalf of Pegasus. All group differences reported are statistically significant (P<0.005). In May 2018, Pegasus also conducted two in-person focus groups with Generation Z. Quotations from these discussions are included throughout this Report.

This survey involves the responses of 1000 participants  
- 500 Generation Z and 500 Baby Boomers.

## GENERATION Z

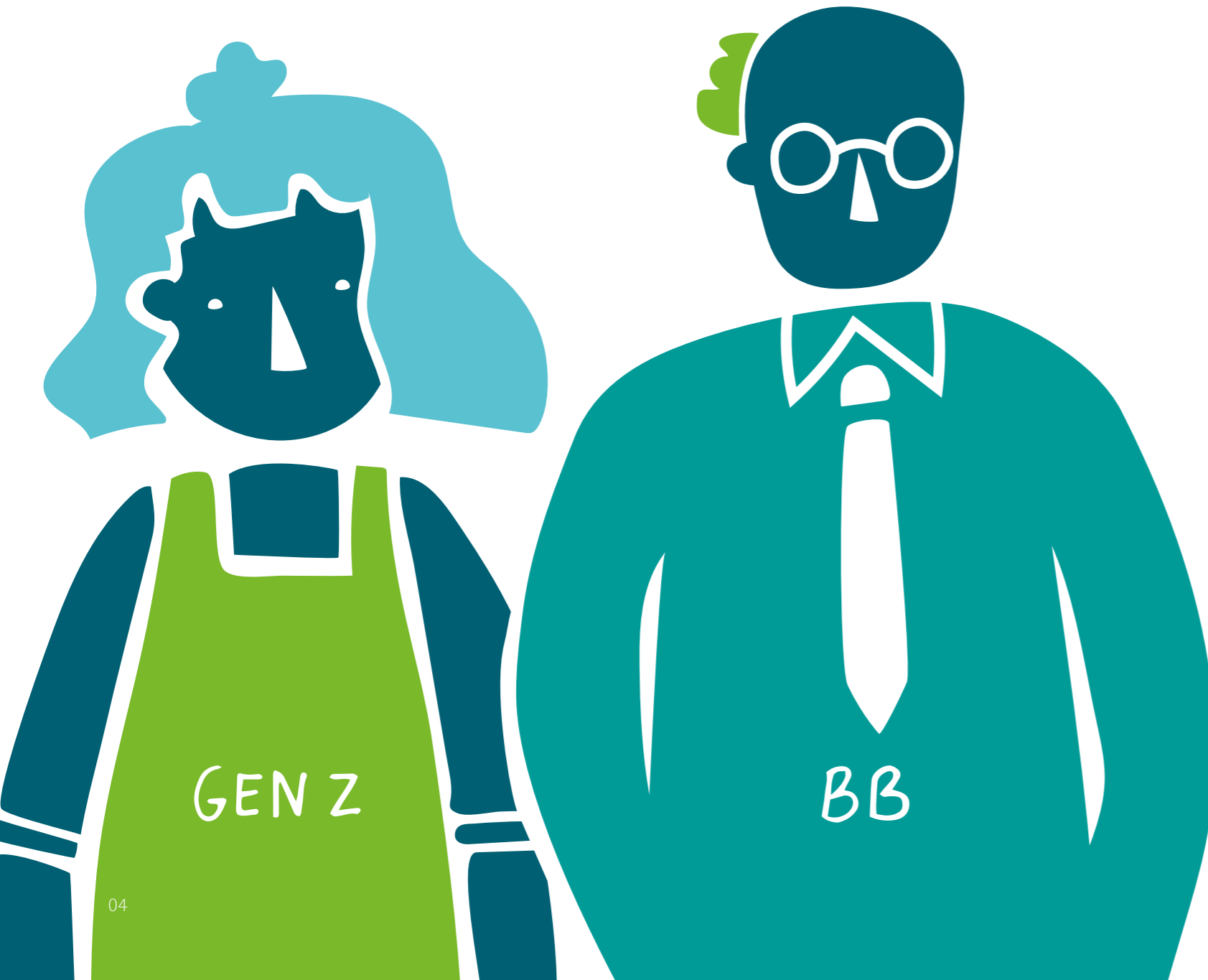
BORN BETWEEN  
THE MID-1990s AND EARLY 2000s  
(AGED BETWEEN 16 AND 23)

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## BABY BOOMERS

BORN BETWEEN  
THE MID-1940s AND MID-1960s  
(AGED BETWEEN 54 AND 72)

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# THE NHS, BREXIT AND HEALTHCARE PROFESSIONALS

## HOW GENERATION Z SEES OUR FUTURE

*Gen Zs demonstrate a strong social conscience, and we see this reflected in their feelings towards the NHS as an institution.*

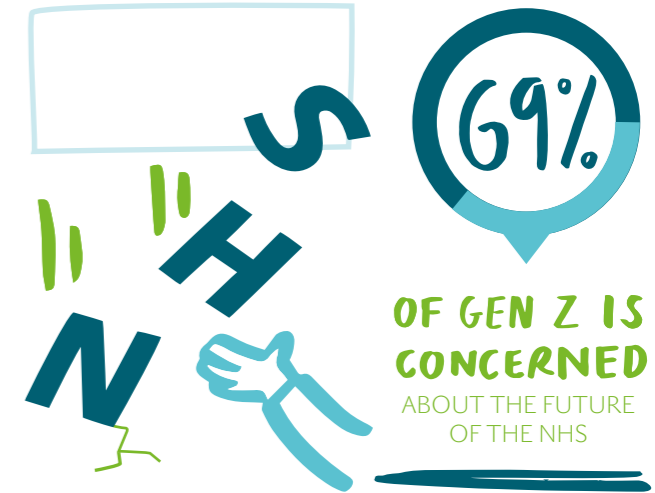
Dr Anna Baker,  
health psychologist



AGREE



THE NHS IS RESPONSIBLE FOR THEIR HEALTH



BELIEVE THE RESPONSIBILITY IS A SHARED ONE



AGREE

THAT BREXIT WILL HAVE A NEGATIVE IMPACT ON THE NHS

## GENERATION Z AND THE NHS

More than a quarter of Gen Zs feel the NHS is responsible for their health, compared to 10% of Baby Boomers.

They share a concern for the NHS with their Baby Boomer counterparts; 69% of Generation Z and 72% of Baby Boomers agree or strongly agree they are worried about its future.

While it's the younger generation that's likely to have used the NHS the least, they are likely to be concerned the most about the impact of Brexit; we see that 59% of Generation Z either agrees or strongly agrees that Brexit will have a negative impact on the NHS compared to 28% of Baby Boomers.

# GENERATION Z AND HEALTHCARE PROFESSIONALS

In keeping with their views about the NHS, nearly three quarters of Generation Z surveyed (72%), agree or strongly agree that they have 'a lot of respect for healthcare professionals'. Over half (53%) of Gen Zs agree or strongly agree that they always go to the doctor when they feel ill for longer than a few days.

But there's a paradox when it comes to consultations. A large proportion (41%) of Generation Z agrees or strongly agrees that they feel their doctor dismisses them, as if they are imagining or exaggerating their symptoms.

But they don't appear to have the confidence to immediately speak out if they disagree with the way their doctor behaves during the consultation.

This may of course reflect their wider interactions with older generations beyond the consulting room.

Despite a huge push by brands and organisations to encourage self-care through the pharmacy when appropriate, there's a clear barrier here.

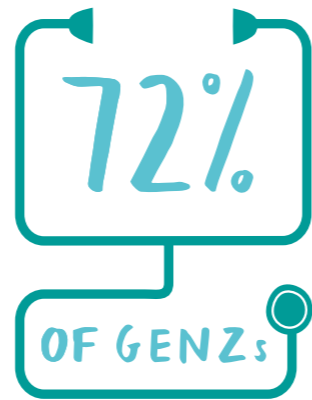
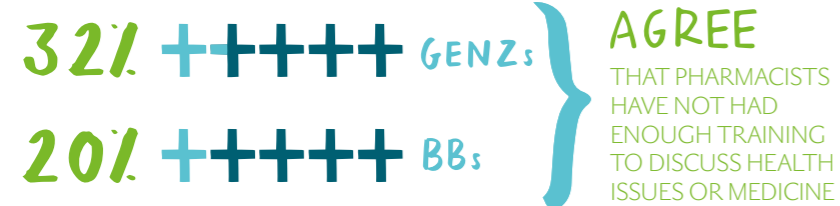
Just under a third (32%) of Generation Z thinks pharmacists have not had enough training to discuss health issues or medicine, compared to just 20% of Baby Boomers.

This opinion is at odds with the five years of training a pharmacist undertakes and the current encouragement of self-care.

The majority of Gen Zs also admit to consulting 'Dr Google' to check symptoms before making an appointment with a GP.

60% of Generation Z agrees or strongly agrees that they Google their symptoms before consulting their doctor, compared to 31% of Baby Boomers.

Online sources are a natural go-to for both generations, but more so with our digital native Gen Zs. Marketers must ensure they use digital channels to provide the right answers to the questions being asked ... when and where they're being asked.



AGREE THAT THEY HAVE 'A LOT OF RESPECT FOR HEALTHCARE PROFESSIONALS'



Generation Z sees the importance of caring for its health and engaging with HCPs, but appears to have more negative experiences. This could be influenced by direct experience but also potentially by a heavy reliance on using online resources to provide information.

The impact here is that satisfaction is lowered by higher levels of knowledge and expectation, regardless of accuracy. Reaching out to this well-informed group must acknowledge this, but also address a need in providing a more personalised service and ensure they feel supported. The reliance on online information suggests a useful role in reaching out to this group.

Dr Anna Baker, health psychologist

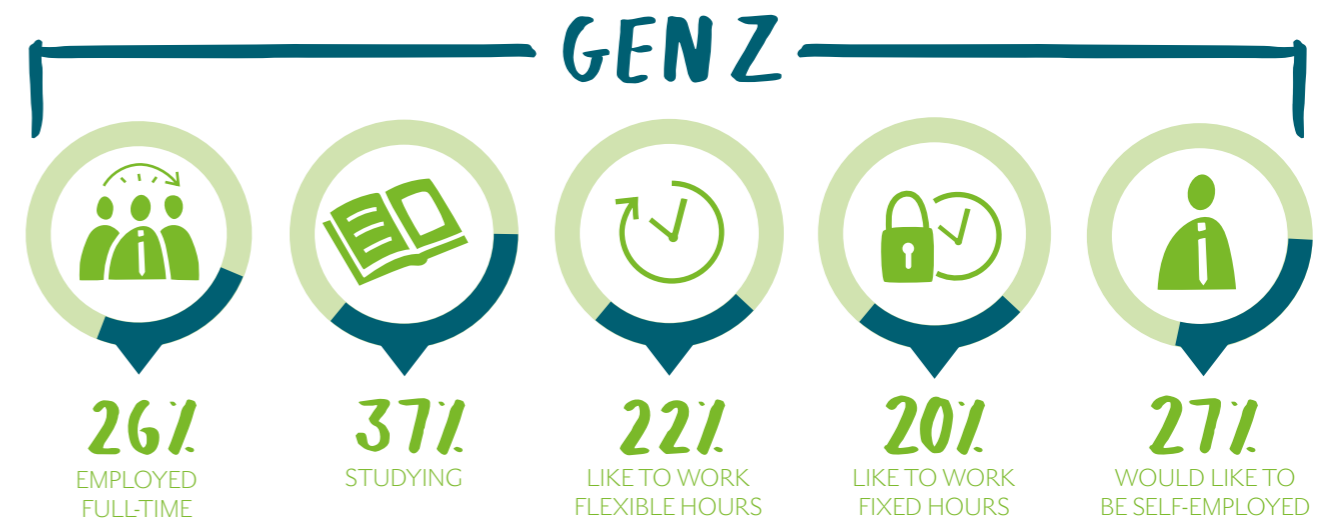


# WORK-LIFE BALANCE

## GENERATION Z'S EXPECTATIONS



**53% OF GEN Zs**  
AGREE A WORK-LIFE BALANCE IS IMPORTANT



It's easy to assume that Gen Zs are less likely to graft in order to achieve their ambitions. It's an assumption that may be founded on the popularity of 'instant fame' TV shows and YouTube.

Yet our research suggests this characterisation is unfair.

Nearly 70% of Gen Zs agree or strongly agree that they will need to knuckle down and work hard to get what they want in life. And 46% disagree or strongly disagree that it will be easy for them to get a job they really want.

Almost a quarter (24%) of Gen Zs agree or strongly agree that it's not important for them to have job satisfaction, as long as they are paid well.

It's important to note that only 26% of Generation Z is in full-time employment (with 37% identified as students), making large purchases and saving unattainable for many.

And this is a group that's certainly not averse to a standard five-day week (Mon-Fri). Despite growing up in a digital world, in which less traditional models of work are thriving, Gen Zs are actually less likely to want to work part-time.

In fact, only 22% indicate that they would prefer to work flexible hours. They are, however, more likely to want a range of different working formats or arrangements over a working week.

The difference in the generations is that young people are nearly twice as likely to want to work for themselves than Baby Boomers, who are more likely to enjoy the stability of traditional employment.



Despite the motivation to work hard, the fact that 55% have previously taken time out due to feeling stressed or overwhelmed by their workload (compared to only 17% of Baby Boomers) suggests that Generation Z feels or experiences this pressure much more than other ages.

Unsurprisingly, work-life balance remains very important across the generations. These findings show that Generation Z is a seriously driven and motivated group that understands the merit of hard work, but within the parameters of sociable hours, to allow time for loved ones.



SAY THEY ARE OVERWHELMED

BY THEIR WORKLOAD, WHICH HAS LED TO TAKING TIME OFF WORK

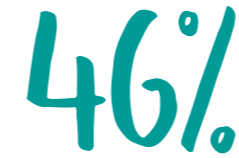
*"I'd like to have a good routine, working 9-5 Monday to Friday – that for me would be a good work-life balance".*

Source: female, aged 20 (Pegasus focus groups)



AGREE

THAT HARD WORK IS NECESSARY TO GET WHAT THEY WANT



DISAGREE

THAT IT WILL BE EASY FOR THEM TO GET THEIR DESIRED JOB



BELIEVE

IT'S NOT IMPORTANT TO HAVE JOB SATISFACTION, IF THEY ARE PAID WELL



*"For me, I'd just like to have weekends off! Friends and family often have weekends off so it means I can spend more time with them".*

Source: female, aged 19 (Pegasus focus groups)

*Work – now and in the future – is important for Generation Z, even though many of these individuals are currently students or in part-time employment. They are willing to work hard but also feel that having time to do other activities is important and want to avoid being overwhelmed by work.*

*Mental and physical health are important to maintain for this group, so providing the right type of support to facilitate a balance between work and life will help avoid loss of workdays.*

Dr Anna Baker,  
health psychologist





# HOW GENERATION Z MAINTAINS POSITIVE MENTAL HEALTH

While members of Generation Z place a stronger emphasis on maintaining positive mental health than older generations, a higher proportion of Gen Zs struggle to discuss mental health problems with a doctor.

This lack of engagement with healthcare professionals may lead to a reliance on alternative therapies or treatment. Normalising mental health issues in this group is important, whether that is promoting discussion about mental health issues with family and friends or ensuring that correct treatment is being sought, where necessary.

For all generations, our research showed that the prevention of mental illness is a significant motivator for general health maintenance. More than two thirds (68%) of Generation Z indicated that they see clear links between mental, emotional and physical wellbeing.

Compared to Baby Boomers, a significantly higher proportion of Gen Zs visit a counsellor or therapist and practise mindfulness techniques to maintain health.

- 13% of Gen Zs visit a counsellor or therapist compared to 1% of Baby Boomers.
- Twice as many of Generation Z (20%) practise mindfulness/meditation than Baby Boomers (10%).

But there are still barriers to Gen Zs discussing mental health; more than half (57%) agree or strongly agree that older generations do not fully understand mental health. This perhaps explains why a large proportion (41%) disagrees or strongly disagrees that they would find it easy to discuss mental health with their family.

**TWICE AS MANY GEN Zs PRACTISE MINDFULNESS**

THAN BABY BOOMERS



**68% OF GEN Zs BELIEVE**

THERE IS A LINK BETWEEN MENTAL, EMOTIONAL AND PHYSICAL WELLBEING



**41% WOULDN'T**

FIND IT EASY TO TALK TO THEIR FAMILY ABOUT THEIR MENTAL HEALTH

**13% OF GEN Zs VISIT A COUNSELLOR (vs 1% BBs)**





Nearly half of Gen Zs told us they would struggle to tell their doctor if they were experiencing mental health problems, which is potentially reinforced by the negative experiences many of them reported.

Like the other generations, Generation Z also has a fear of dependency and side effects when it comes to taking medication for mental health disorders.


Though 88% of Gen Zs indicate that they are willing to take either over-the-counter or prescription medicine for disorders such as anxiety and clinical depression, they appear to be more concerned about 'losing' themselves or their personality compared to the older generation.

Gen Zs are also more concerned about social judgement compared to Baby Boomers:

- 12% of Gen Zs indicate that they are unwilling to take medication for anxiety or depression for fear of being judged, compared to only 3% of Baby Boomers.

**57% OF GEN Zs**

AGREE THAT OLDER GENERATIONS DON'T FULLY UNDERSTAND MENTAL HEALTH

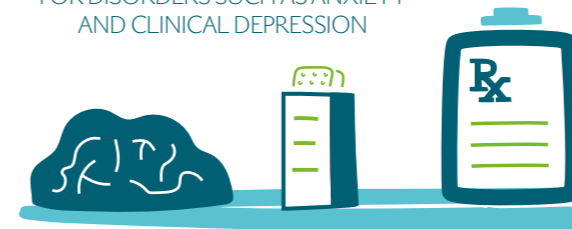


**46% OF GEN Zs STRUGGLE**

TO TELL THEIR DOCTOR ABOUT THEIR MENTAL HEALTH

# GEN Z ON TAKING MEDICINE

FOR DISORDERS SUCH AS ANXIETY AND CLINICAL DEPRESSION



**88% WILLING**

**12% UNWILLING**

(vs 3% BBs)

*"My dad is really old school, he's like 'there is nothing wrong with you!'"*

Source: male, aged 22 (Pegasus focus groups)

*"Like when you hear your mate goes 'Oh yeah I'm just gonna take prescription meds for my depression', it's like 'no don't!' You'll just become reliant on them".*

Source: male, aged 19 (Pegasus focus groups)

*We can see there's a lack of trust amongst Generation Z when it comes to speaking to their doctor, particularly about mental health. The reliance on alternative therapies or treatment may explain a lack of engagement with healthcare professionals.*

*There's a need to normalise mental health issues in this group in order to ensure patients seek the right treatment for their needs. As social norms play a powerful role in their own feelings about mental illness, it's important to normalise not only the prevalence but also the importance of talking to others – whether this is a friend, family or health professionals.*

*While there is a greater awareness about mental health as part of their overall wellbeing, unnecessary concerns about others may lead to treatment avoidance.*

Dr Anna Baker, health psychologist



# SOCIAL MEDIA AND HOW GENERATION Z USES IT

We've already seen that Generation Z are more likely to turn to the internet for health questions - 29% use social media for health advice and information compared to 4% of Baby Boomers. But it's also the place many commentators feel is creating many psychological and emotional health problems in the first place.

*"Maybe it's just our age, and I know everyone struggles with self-love and stuff, but I think especially in your 20s, and like teens, I think you're a lot more conscious of how you look but I think that's probably got a lot to do with social media".*

Source: female, aged 18 (Pegasus focus groups)



There is huge current debate around the impact social media is having on young people to lose weight and change the way they look. Social media is often accused of creating a pressure to always achieve perfection.

So it's probably no surprise that 88% of Gen Zs are either sometimes or constantly exposed to fitness or beauty influencers on social channels. But worryingly, this younger generation is more negatively impacted by these types of images than older generations.

When looking at these images:

- 40% of Gen Zs feel jealous, compared to 9% of Baby Boomers.
- 40% of Gen Zs feel unconfident compared to 10% of Baby Boomers.
- 48% feel sad they don't look like the images in social media, compared to 15% of Baby Boomers.
- 47% feel pressure to lose weight or tone up, compared to 12% of Baby Boomers.

29% GEN Z

4% BB

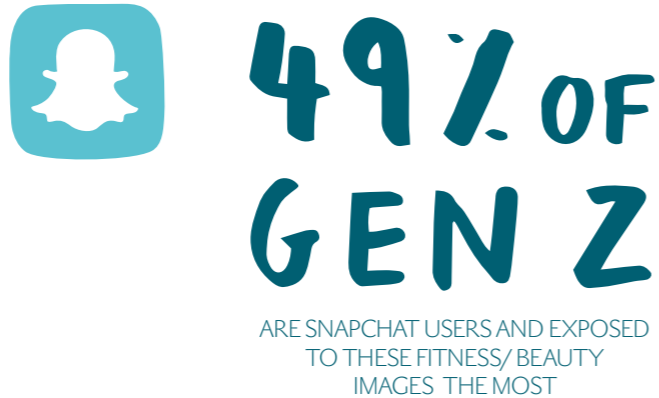
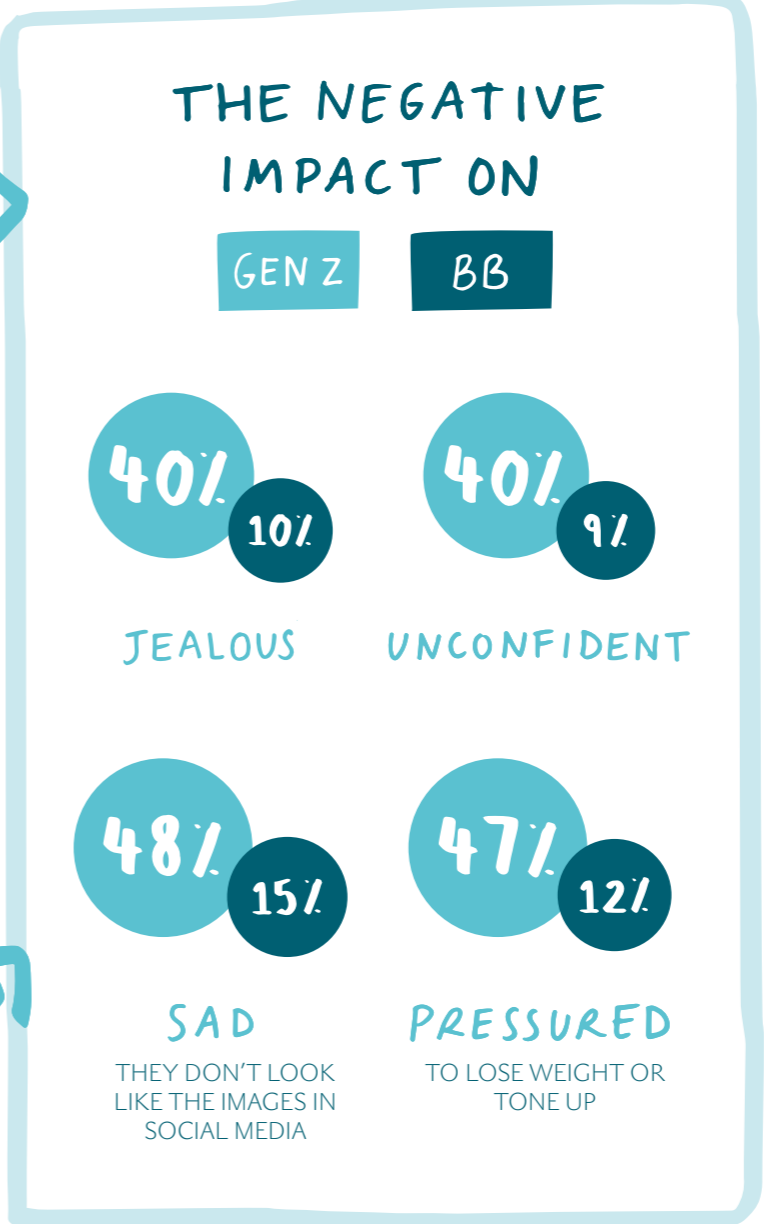
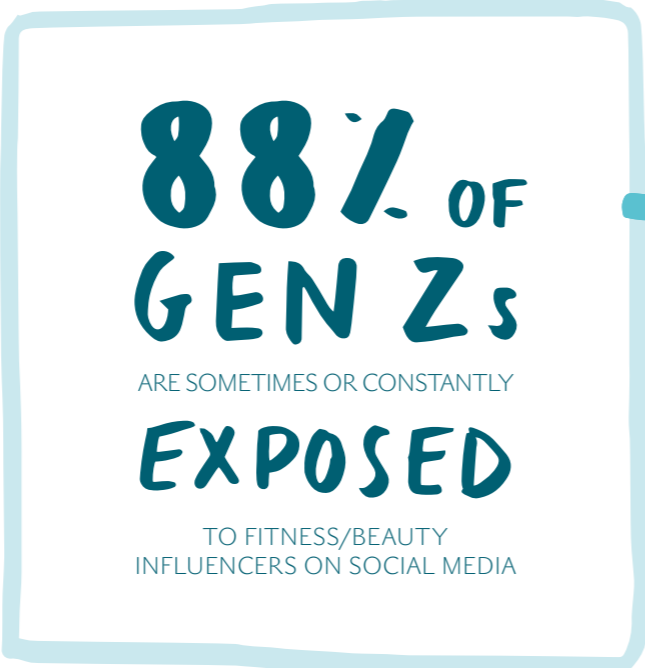
VISIT  
SOCIAL MEDIA FOR  
HEALTH INSPIRATION



32% OF  
GEN Zs  
TRY TO STAY  
FIT & HEALTHY

Our data suggests Snapchat users are exposed to these types of images the most (49%), closely followed by Instagram (45%). Snapchat users also feel the most jealousy (39%) as a result of viewing these images.

Almost a third of Gen Zs (32%) indicate that they try to stay fit and healthy so they can look like the people in these types of images. So while on the one hand, such images can be damaging for this generation's mental wellbeing, they may also promote improved physical wellbeing in encouraging Generation Z to maintain exercise and healthy eating – and finding a healthy balance is essential.



*Social media and associated images play a powerful role in setting standards and expectations of how Generation Z should look. The impact of this is lower mood about how they look, and a greater impact on looking right rather than having a healthy weight.*

*These unrealistic images lead to unnecessary negative feelings about themselves, which may have unhelpful effects on their motivation to stay healthy.*

Dr Anna Baker,  
health psychologist



# PHARMACEUTICALS AND HOW THEY FIT INTO THE HEALTH OF GENERATION Z

A limited understanding of the pharmaceutical industry across both groups presents the industry with an opportunity to educate and communicate their work, particularly in terms of charity partnerships and investments.

Both Gen Z and Baby Boomers have a limited understanding of what pharmaceutical companies do. For the majority of the questions, a high proportion of our sample selected 'neutral', suggesting they are unsure how these companies operate and what they offer. And indeed, they may have little reason to engage with them.

- 46% of Gen Zs agree or strongly agree that pharma companies are more interested in making profit than the wellbeing of the people who use their medication.
- 63% of Gen Zs did not agree or strongly agree that they fully understand what pharma companies do.
- 51% of Gen Zs agree or strongly agree that pharmaceutical companies have an obligation to promote healthy living.

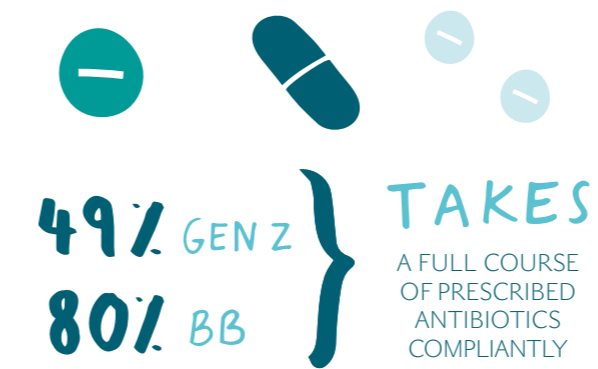
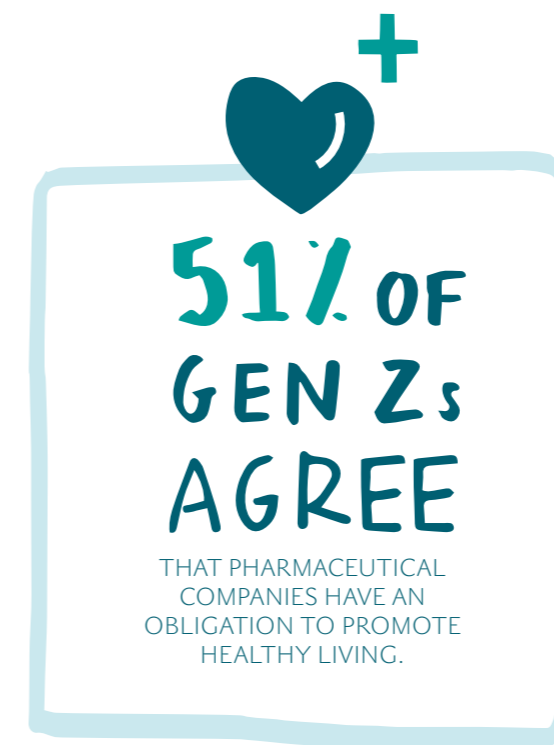
It's also worth noting that 49% of Gen Zs compliantly take a full course of prescribed antibiotics, which is significantly lower than for Baby Boomers (80%).

## 63% OF GEN Z DID NOT

AGREE OR STRONGLY AGREE THAT THEY FULLY UNDERSTAND WHAT PHARMA COMPANIES DO

## 46% OF GEN Z

AGREE PHARMA COMPANIES ARE MORE INTERESTED IN MAKING PROFIT THAN THE WELLBEING OF THEIR CONSUMERS



*The lack of understanding of what pharmaceuticals do or how they work is not surprising in Gen Zs.*

*Trying to inform Generation Z on the wider practices of pharma companies may increase their public profile in this group.*

*Taking insights across the specific topic areas suggests that Generation Z is a group keen to focus on its health, but is heavily influenced by social media and the internet.*

*Breaking down negative influences is important in encouraging better engagement with healthcare professionals but also in promoting better health management.*

Dr Anna Baker,  
health psychologist





To find out more or to speak with one of our Strategy & Insights team,  
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