

# My Healthcare, My Future: *Next Gen Health*





## David Jones

Director of Oncology, and Interim Leader of Human Health at MSD Ireland

For us at MSD, we believe that the most important thing we make is a difference and we always aim to take a patient-centric approach in all that we do. We also try to challenge ourselves continuously to innovate for the betterment of patients, healthcare providers and the wider healthcare landscape in Ireland and across the world. We are committed to playing a role as a trusted provider in the Irish healthcare landscape and we hope that this year's *'My Healthcare, My Future: Next Gen Health'* report will help to shine a light on areas of concern and relevance to patients in Ireland.

This report is intended to continue the important conversations which shape our healthcare system now and into future, embracing and including younger populations and making sure we do not lose sight of their needs. The findings potentially challenge the common perception that younger people in 2024 are more health-savvy than previous generations. According to our research, there is a consensus across all age groups surveyed that GenZ is the demographic the Irish healthcare system is least equipped to manage. This revelation is particularly significant as it underscores the urgent need for tailored strategies to address the unique health challenges faced by this generation. It is imperative that we listen to and incorporate young people's opinions and feelings into

healthcare decision-making. Their voices are crucial in shaping a healthcare system that is inclusive, responsive, and capable of meeting the needs of all demographics effectively.

Reflecting on the findings from our previous reports, including our 2019 *'My Healthcare, My Future: The Right Click'* report, it is evident that the role of technology and online health information will continue to be crucial in healthcare.

Many people now turn to the internet to research symptoms for themselves or their family members before consulting healthcare professionals. This trend underscores the importance of providing credible and trustworthy sources of information. The growth of social media as a source for healthcare information is expected to persist, particularly as individuals seek information while waiting for appointments or when existing information is unclear or unavailable. However, this shift brings significant risks of disinformation and misinformation, which can have serious implications for healthcare.

Considering other ways to increase optimism in Irish healthcare, it is clear that there is a strong belief in the importance of government investment in making new medicines available to the public.

Reflecting the need for improved access, the values people most desire in a healthcare service are straightforward: affordability, access, and equality. These priorities highlight the essential components of a healthcare system that truly serves its people and fosters a sense of optimism and trust in its capabilities.

A lot of incredible work is being done in Ireland's healthcare system, amidst challenging barriers and conditions. It is important to acknowledge the extraordinary work undertaken by all individuals involved with delivering healthcare services here in Ireland. On behalf of MSD here in Ireland, I would also like to say a special thank you to all those who took the time to take part in our research and especially our GenZ respondents. I would also like to thank our contributors, including Mike Mansfield, Joanne Dolan, Sophie Kathryn, and Dr. Gary Stack, their insights and work are very much appreciated by all of us at MSD.

I look forward to discussing these research findings over the coming weeks and months and continuing to gain additional perspectives and views through conversations, dialogue and discord need to increase optimism in healthcare in Ireland.

# INTRODUCTION

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# The My Healthcare, My Future: Next Gen Health report shares insights into the national perceptions and expectations of healthcare in Ireland.

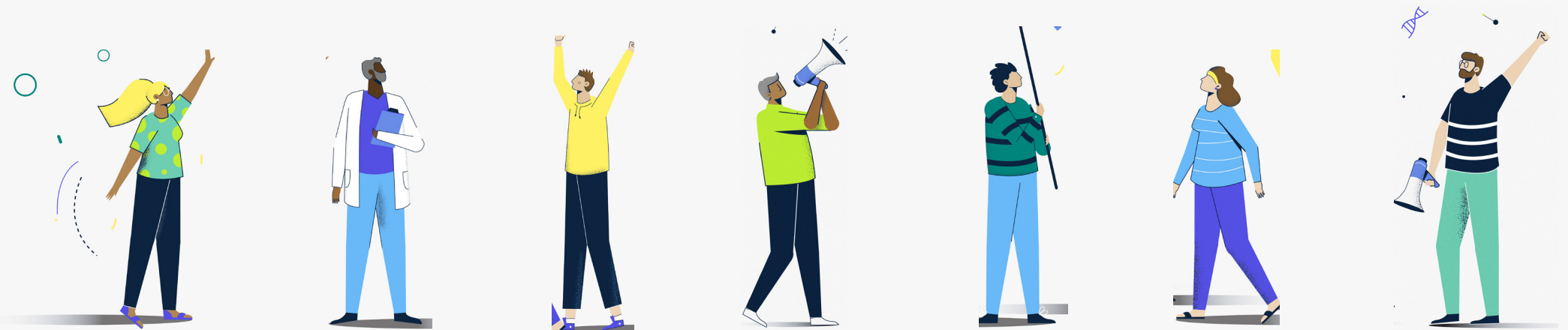
Using the four key areas polled as part of previous My Healthcare, My Future reports, we have undertaken a deeper dive into the GenZ demographic to better understand their specific expectations and experiences.

This report includes representative data from a cohort of 1,016 participants, including over 300 respondents who identify as being GenZ members.

The findings illustrate gaps and opportunities in the perceptions, expectations, and experiences of the general population.

The research also looks to analyse to what extent we perceive the Irish healthcare system to be equipped to deliver on current and future needs.

This report examines our populations' level of optimism and pessimism about the future of healthcare in Ireland, exploring what may be driving positive and negative perceptions in order to identify current and future gaps and risks.



# KEY RESEARCH HIGHLIGHTS

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Only **55%** of the population consider themselves to be healthy, underlining an opportunity for healthcare services to better support population needs.



Younger adults are more likely to cite the **cost of health insurance** as one of the more prevalent difficulties in the healthcare system versus the wider population, potentially underlying a barrier to access.

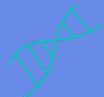
**32%**

of the population believe that the Irish healthcare system is not well equipped to deal with the GenZ population.



**9%** believe that the standard of care in Ireland meets their expectations and

**45%** say they are pessimistic about the future of healthcare.



**More than half of people (54%)**

say that they cannot currently afford the costs associated with their health and the health of their families and loved ones.



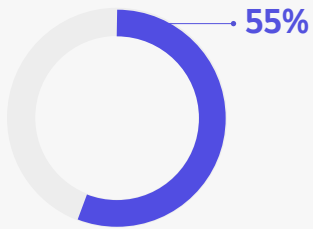
Fitness, mental health, and diet were all identified as being less important to younger adults. This finding demonstrates a surprising difference between younger and older cohorts, who seem to have differing views on what is important to their health and wellbeing.



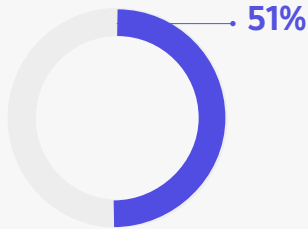
# MY PERSONAL HEALTH



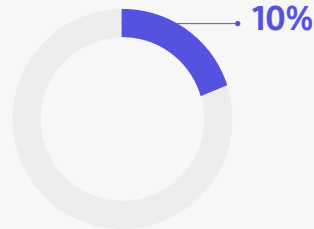
■ Gen-Pop



Only 55% of respondents consider themselves to be healthy.



51% surveyed, said that they feel in control of their personal healthcare decisions.



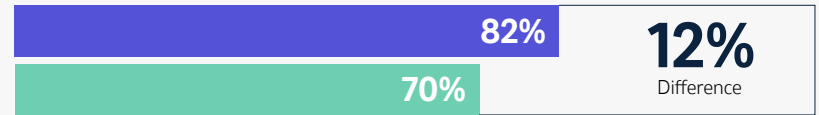
10% say that they are recovering from a recent illness or a period of being unwell.



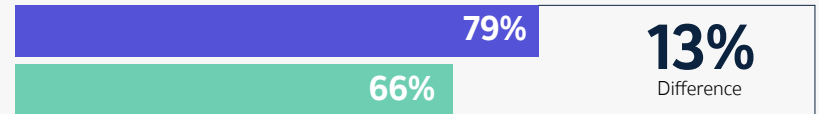
Looking at specific health dimensions, younger adults potentially place **less importance** on certain aspects, in the context of living a healthy balanced life now and into the future.

■ Gen-Pop ■ GenZ

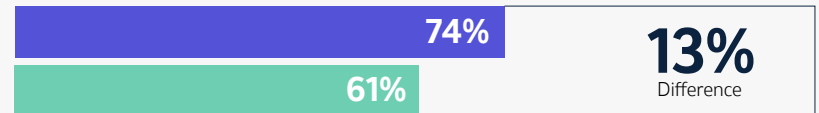
### My Mental Health



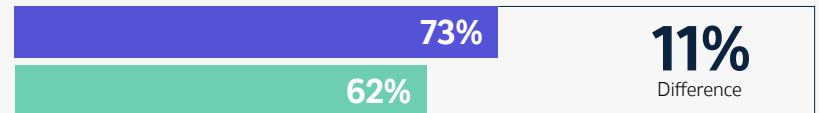
### My Physical Health



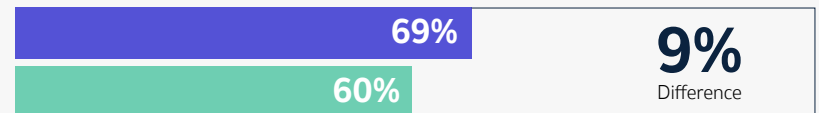
### My Emotional Health



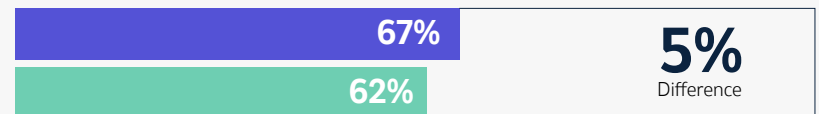
### Preventing Illnesses via Good Lifestyle Choices



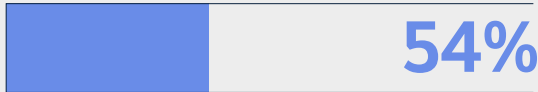
### Diet



### My Fitness



We asked respondents what they think are most important for living a healthy, balanced life now and in the future.



Cannot afford to manage the costs associated with their health.



Believe that medicines in Ireland are more expensive than in other EU countries.



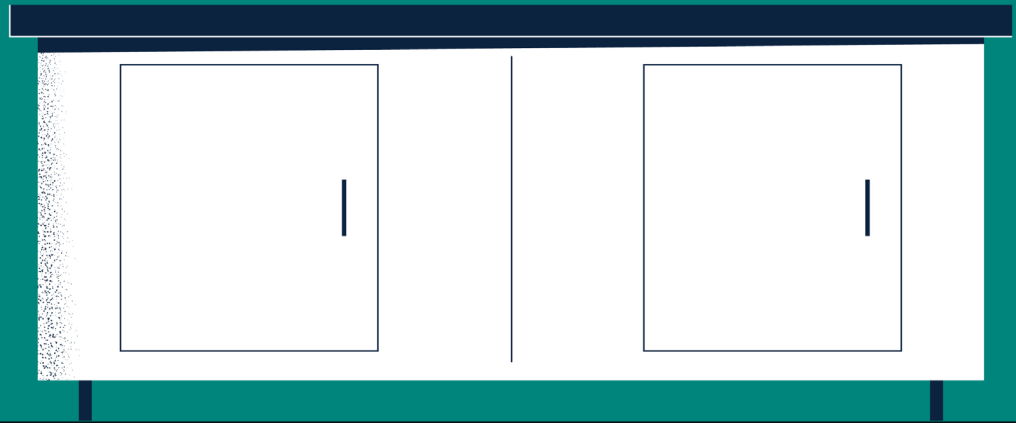
**Sophie Kathryn**  
Graduate in Applied Psychology,  
and Mental Health and Youth  
Rights advocate

Sophie Kathryn, Graduate in Applied Psychology and, a Mental Health and Youth Rights advocate, said: "Looking at the differences between younger people and the wider population, it is surprising to see young populations index lower on their mental health, fitness, and diet. However, the number of younger people prioritising their mental health is still high which is a real positive. Being able to empower young people is a key component to improving the healthcare system alongside enabling us to have good relationships with people in health, and encouraging adoption of health as a life skill."



# MY HEALTH SERVICE

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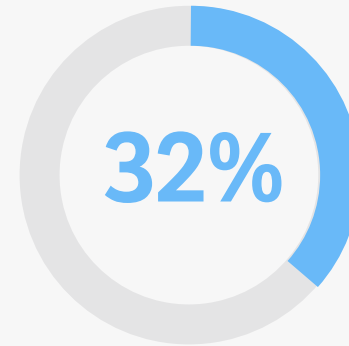


# 9%

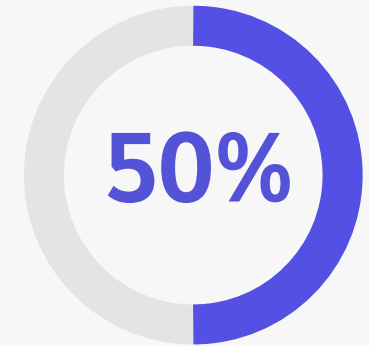
of people believe that the **standard** of care in Ireland meets their expectations.

# 1 in 5

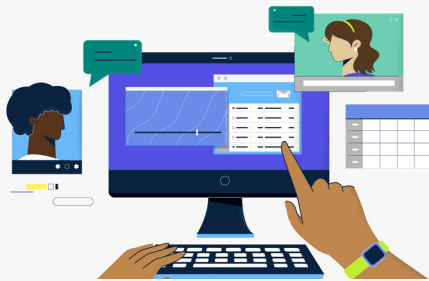
20% of people have experienced **delays in accessing** specialist appointments (e.g. consultants) when referred by their GP.



of the population believe that the **Irish healthcare system is least prepared to cater to young adults**. However, 59% believe it to be best prepared to care for newborns and infants.



say they have **access to adequate** mental health supports.



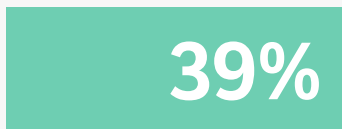
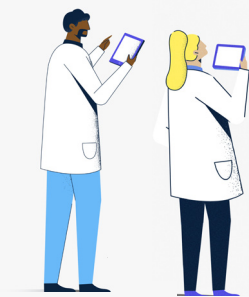
# 61%

of the general population said that **they will research their symptoms or the symptoms of a family member online first**, before they visit their pharmacist or GP.



**Mike Mansfield**  
Jigsaw

**Mike Mansfield, Director of Communications and Fundraising at Jigsaw, said:** *“We’re seeing an increased demand for our services, often from a concerned mother, reaching out on behalf of their son or daughter who has been waiting a while to see a GP first. Parents can become quite frustrated by the long journey to access services on behalf of their children and the lack of integration between services. Many of these issues could be supported at an earlier stage through a lower intensity intervention, with a quick, independent, non judgmental consultation in a more informal setting. However, because this hasn’t been made available, the problem can escalate into other, more longer term issues.”*



■ Gen-Pop ■ GenZ

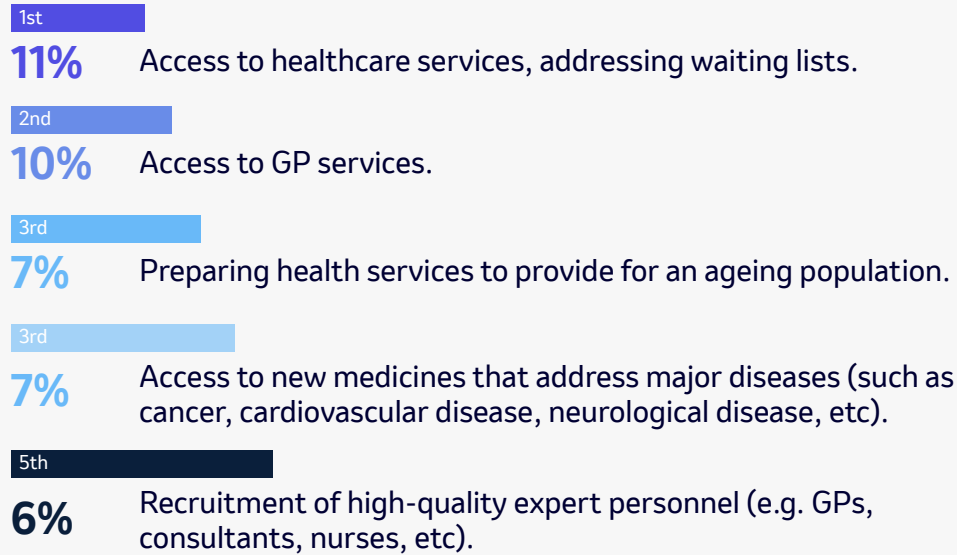
Agree that they visit their **pharmacist first**, before their GP.

# MY ACCESS

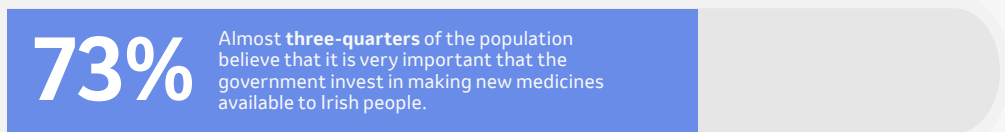
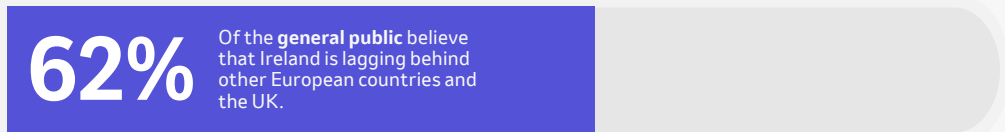
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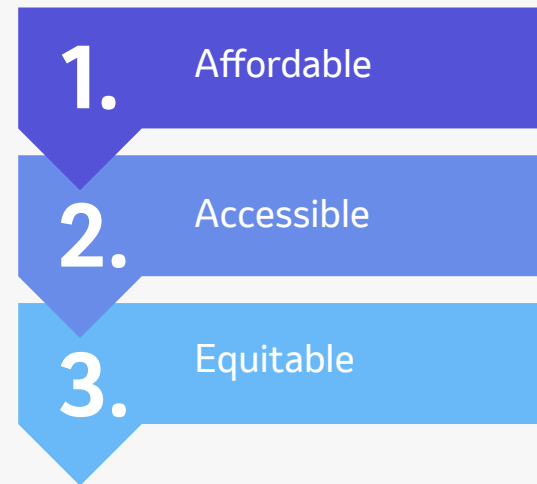
**We asked respondents what they think the biggest difficulties currently facing the Irish healthcare sector are:**



More than half (**54%**) of people say they **can not afford** to manage the costs associated with their health and the health of their families and loved ones.



**When the public are asked about what they desire in a health service, three values emerge strongly. The public want healthcare delivery that is:**



**Dr Gary Stack**  
GP, FRCGP, MICGP, Medical Director SouthDoc and HSE GP lead South Kerry

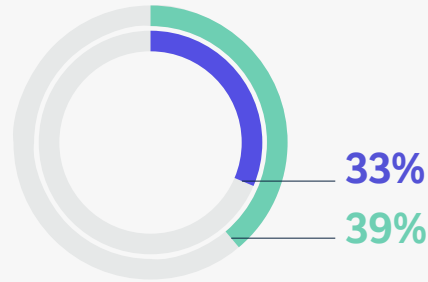
**Dr Gary Stack, GP, said:** "Access to healthcare services is a huge challenge in Ireland currently, and one that won't be easily solved. Access to GPs has become more challenging for many; specialist care and referrals can then involve even greater challenges, delays, and costs. Technology and telemedicine can certainly play a role in alleviating some of the burden for the system and the patient, but it's important to always ensure we're properly upholding the principles of care and quality of service. Technology can be incorporated to improve the accessibility and efficiency of primary and community care, but it can never replace it."

# MY DIGITAL HEALTH



# 57%

of people believe that the appropriate use of technology can improve existing healthcare services.



33% say they have been at least somewhat negatively impacted by **information** about vaccination on social media, compared to 39% of GenZ being negatively impacted.

### Use of wearable devices to track key healthcare data such as a fitness watch, which helps to make key decisions about health:

■ Gen-Pop ■ GenZ



## 37%



## 42%

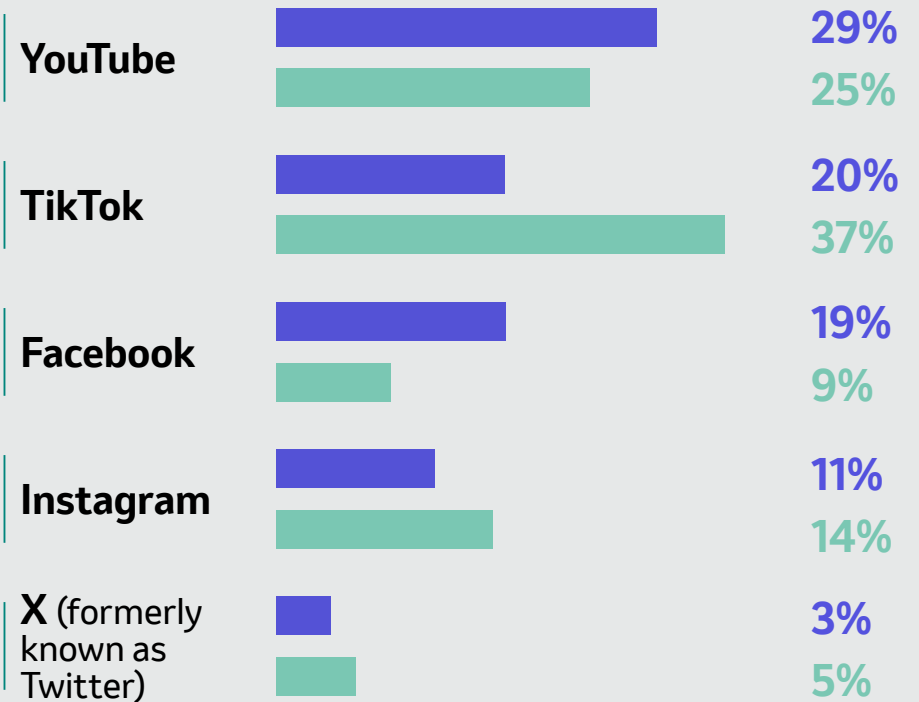


**Joanne Dolan**  
Teen-turn

#### Joanne Dolan, Co-Founder at Teen-Turn, said:

“Looking at the research and the growth of tech and healthcare wearables, I think it is important to acknowledge that we can’t index too heavily on this information. I say this as Teen-Turn works with kids from varying socio-economic backgrounds, many of which don’t have access to smart watches, or heart rate monitors, etc... let alone the apps or additional costs that can come with these products and services.”

### We asked respondents which platforms they had accessed for health information over the past 12 months:



Nearly **one-third (29%) of Irish adults** have used YouTube in the past 12 months for health information, while over one-third (**37%** of GenZ) have used TikTok in the same time period for health information.

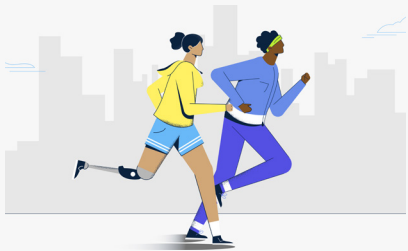


# THE GENZ PERSPECTIVE

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**Joanne Dolan, Co-Founder at Teen-Turn, said:** “To meet the needs of younger adults, we really need to understand these needs better, understand how to address their expectations, be inclusive, communicate and be prepared to listen to feedback. For example, use of terminology and labels such as GenZ can alienate people. In my experience of working with younger adults, they are much more fluid about how they identify themselves and who they are. While it’s important we don’t label any individual, or make sweeping assumptions about younger adults, the research shows that the healthcare system is likely not best equipped to engage with this age group.”



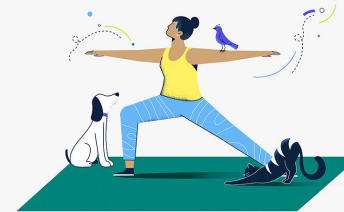
Young adults perceive fitness, mental health, diet, and physical environment as **significantly less important** factors **for good health** than the general population.

Positively, GenZ still index highly on mental health (**70%**), in fact it is the most important factor to both GenZ and wider population.



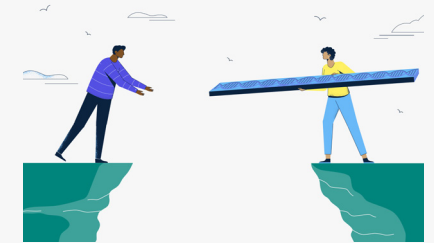
One third of the young adult population say that they would not consider themselves to be **“healthy”** (**32%**).

Young adults were more likely to call out the potential impact of misinformation as a factor that could **negatively influence** their views on health and vaccination compared to the general population.



**3 in 5 (60%)** young adults say that they cannot afford the cost associated with their health and the health of their families and loved ones.

**51%** of young adults surveyed say they have health insurance, consistent with the wider population. The number of young adults who say they are **pessimistic about the future of healthcare** is also consistent with the wider population at 45%.



When looking at the largest perceived challenges facing healthcare in Ireland, access issues caused by **waiting lists and general access to GPs** were most consistently identified as the two largest issues.

Looking beyond these challenges, the wider public place a greater emphasis on **preparing health services to provide for an ageing population** as the next greatest challenge, while younger adults highlighted access to health insurance.



# METHODOLOGY

Reputation Inc and Qualtrics XM conducted a programme of research on behalf of MSD Ireland from October 2023 to April 2024.

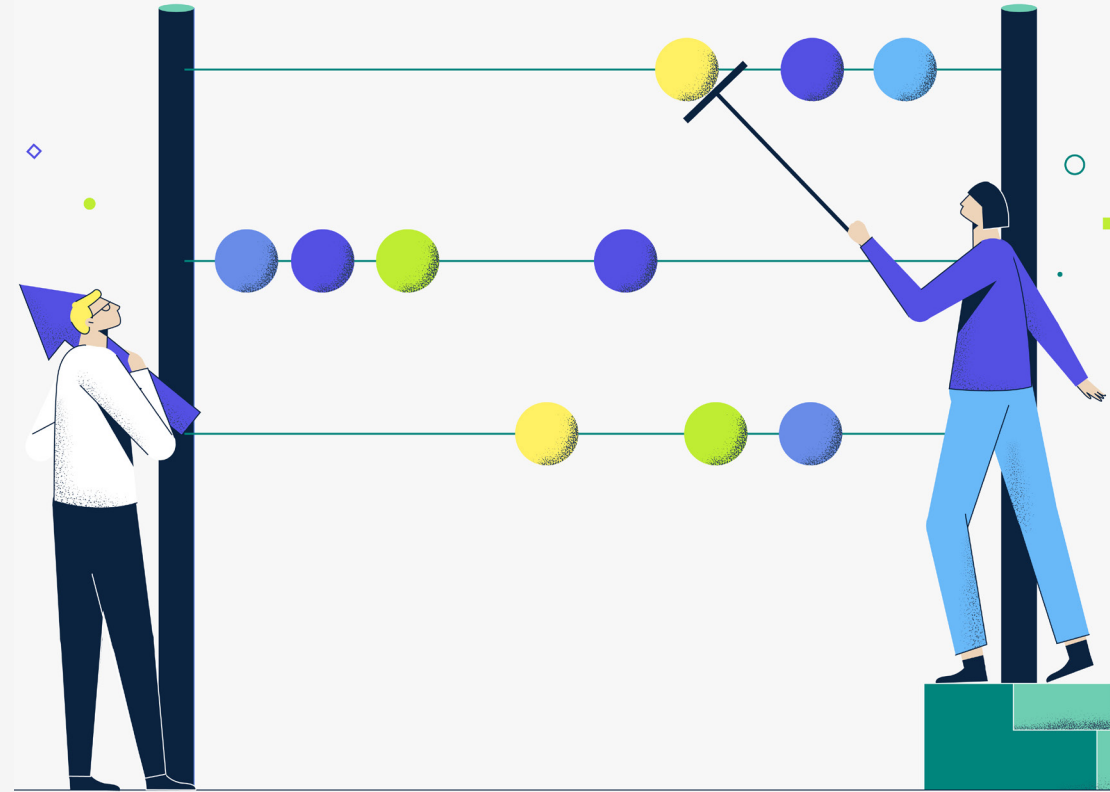
## Online Questionnaire:

The survey was conducted online utilising specialist software and panels from Qualtrics XM. The survey polled a population of 1,016 people across Ireland aged 18 and over. Quota sampling was applied to ensure a representative sample of the Irish population in terms of both age and gender.

## In-Depth Interviews with Key Stakeholders:

In conjunction with the online research, a short series of in-depth interviews were conducted with a sample of key stakeholders with a relevant interest in this subject matter. These interviews were conducted remotely and provided the opportunity for open, free-flowing dialogue to better understand and provide context to research findings. Contributors are acknowledged on the following page of the report.

This report showcases the results of the research, focusing predominantly on the views of the general public, supplementing this where appropriate with contributions from key stakeholders.



# CONTRIBUTORS



# Dr Gary Stack

a practicing GP and Fellow of the Royal College of General Practitioners of Ireland. Based in Killarney, Co Kerry, Dr Gary provides compassionate, efficient, and quality assured family doctor services for his local community.



*As a GP, one of the increasing challenges facing practitioners in delivering healthcare on a daily basis is the difficulty of access due to increasing patient numbers and increased complexities of patient care. Looking towards the future, these challenges could become even more serious when combined with other broader issues, such as antimicrobial resistance and the rise in unvaccinated rates.*

*Access to healthcare services is a huge challenge in Ireland currently, and one that won't be easily solved. Seeing a GP in the first place can be a challenge for many; specialist care and referrals can then involve even greater challenges, delays, and costs. It is pressing that we work to address these issues now and collaboratively try to find innovative solutions to these serious challenges.*

*It's positive to see the My Healthcare, My Future: Next Gen Health report highlight a growing prevalence of telemedicine and health technology in the community. Technology and telemedicine can certainly play a role in alleviating some of the burdens on the system and the patient.*

*However, it's important to always ensure we're properly upholding the principles of care and quality of services. Technology can be incorporated to improve the accessibility and efficiency of primary and community care, but can never replace it.*

*GPs play a key role as the main care advocate for patients: we know their clinical history, have an awareness of their previous presentations, and understand their unique circumstances and needs. From this knowledge and relationship, we are able to guide patients through any engagement with different specialists, investigations, or other primary and secondary care instances - we are effectively the coordinators of their care. I think this role is very clear for many in our society, but I am concerned that young people are not being given the same opportunity to experience it.*

*Current challenges in access are pushing young people to only access care ad hoc through a decentralised mix of different platforms and channels. They never really reap the benefits of a central care provider and advocate. They're, therefore, currently missing out on important care provisions, often without even being able to realise what they are missing out on.*

*We must work with young people to improve both access and education, helping them to properly prioritise and look after their health needs within a healthcare landscape that is inherently challenging to navigate.*

# Mike Mansfield

is Director of Communications and Fundraising at Jigsaw, the national centre for youth mental health in Ireland. Through a mix of online and in-person resources, Jigsaw offers expert mental health advice and supports for young people between the ages of 12 and 25.



*While the My Healthcare My Future report highlights differences in how young people prioritise certain aspects of their health compared to older populations, including Diet, Fitness and Mental Health, it is likely the case that younger people may be more complacent around these topics, while older populations have more experience of managing them and the impacts of not managing them.*

*This echoes our experience of dealing with younger people who are coming to us, often later in the journey than we would hope, and the mental health issues and concerns of younger people are therefore, more advanced.*

*Linked to access to services at Jigsaw we are seeing an increased demand for our services, with a lot of our referrals from their GPs. This is usually a concerned mother reaching out on behalf of their son or daughter, and often they have been waiting to even see their GP, let alone specialist services. Parents can become quite frustrated by the long journey to access services on behalf of their children or because of the lack of integration between services. We find that at Jigsaw, we are often their last hope having spent a while being sent around the houses.*

*Often, these issues could be supported at an earlier stage through a lower-intensity intervention via quick, independent, and non-judgmental consultation in a more informal setting with us at Jigsaw. However, because this has not been made available the problem might then*

*escalate into other issues. These early interventions can help turn things around for some people, rather than their issues becoming an actual problem later or impacting lives and social behaviours.*

*Similarly, services like CAMHS require a GP referral, delaying the ability of those who need the services to access them and, further, potentially compounding mental health issues which can escalate over time. Early intervention and greater inter-agency communication might help to alleviate some of the delays and waiting lists placed on services like CAMHS.*

*Access is important for younger people, to ensure healthier populations in the future. Bringing these services to the younger people who need them in places like schools can help to increase their accessibility; younger people spend almost a third of their lives in schools and colleges, and here, a listening ear, talk therapy, or other low-intensity services might help avoid clogging up systems.*

*Looking at technology plays a huge role in the lives and mental well-being of younger people. Moderating the use of technology from a hygiene point of view and helping people mind themselves online can play a role in their overall health and well-being. Daily habits like good sleep are massively interrupted because of technology, which in turn has a knock-on impact on people's health. There likely is a role to help increase awareness of the link and impacts the over-use of technology can have on our mental health and, we only realise it when we are a bit older.*

# Joanne Dolan



is the co-founder of Teen-Turn, an award-winning Irish charity that helps teenage girls from underserved and underrepresented communities progress into third-level education. Since its establishment in 2016, Teen-Turn has helped thousands of girls from DEIS schools kick-start careers in STEM and related subjects.

*At Teen-Turn, we see a lot of young adults who cannot afford to visit a GP, let alone the prohibitive cost of health insurance. Often, these same younger adults fall through the cracks between medical card ownership with families above an income threshold, yet with limited disposable income available for young adults to spend on visiting a GP. In this regard, across our participants, we are seeing that some of their most basic healthcare needs are not being met by society and Ireland's healthcare system.*

*Many of the things older populations would likely have taken for granted when they were younger, are now not available to the younger adults we are talking about today. This is a bit of a health crisis in the making... Looking at complacency among these younger adults about their health, fitness, mental health, and general wellbeing in the context of rising health insurance costs, poor access to GPs and other barriers to healthcare, it may get worse for some people before it gets better.*

*To meet the needs of younger adults, we really need to understand these needs better, understand how to address their expectations, be inclusive, communicate and be prepared to listen to feedback. For example, use of terminology and labels such as 'Gen Z' can alienate people. In my experience of working with younger adults, they are much more fluid about how they identify themselves and who they are. While it is important we do not label any individual, or make sweeping assumptions about younger adults, the research shows that the healthcare system is*

*likely not best equipped to engage with this age group. To build better health resilience for the future, it is important to include younger adults in healthcare decision making early, ensure they have access to the tools, services, and information they need now, so that they can live happier and healthier lives in the future. A greater focus on lifestyle choices and prevention will help in turn to build a more robust healthcare system, less threatened by preventable diseases.*

*To do this, we need to meet their needs head-on, not just through reducing the cost barriers, but by actually bringing healthcare directly to younger people. Increase their access to nurses in schools and colleges, so that the solution is on their doorstep. The school's vaccination programme is a good example of effectively bringing healthcare to younger adults, and we can prevent other diseases with a similar focus within schools and colleges. If we want to be interventive and catch these things early and prevent them from burdening health systems later, this demographic is accustomed to things arriving to them.*

*Looking at the research and the growth of tech and healthcare wearables, it is important to acknowledge that we cannot index too heavily on this information. I say this as Teen-Turn works with kids from varying socio-economic backgrounds, many of which do not have access to smart watches, or heart rate monitors, etc... let alone the apps or additional costs that can come with these products and services.*

# Sophie Kathryn

graduate in Applied Psychology and a passionate mental health and youth rights advocate. With a focus on technology, Sophie is also a national advocate for research and evaluation.



*Looking at the differences between younger people and the wider population, I think it is really surprising to see young populations index lower, their mental health, fitness, diet etc... Looking closely however, the number of younger people prioritising their mental health is still really high (70%) which is a real positive. A possible explanation for the higher prioritisation among the wider population could simply be that we're looking at a snapshot in time when post COVID-19, we're seeing the impact that mental health has had on all people manifest in this data. Traditionally, younger people have always been associated with the topic of mental health but now, everyone has reprioritised what is important to them, including their mental health and other aspects of their personal health.*

*Access to health is different for younger populations. This might be a complacency or a lack of exposure to the system very generally speaking. We don't necessarily have the answers to some questions or know how to get the answers to those questions, like how would I go about seeking a specific service? Whenever I have had like healthcare experiences, they've been very, very positive. But it's actually quite difficult to try to figure out how to navigate that.*

*There is a pessimism among younger people because we're equally impacted by waiting lists and rising costs of health, and inaccessibility very generally speaking, but we also have less disposable income to dedicate to the problem when we have one. This can impact people then who become more complacent about smaller issues which could potentially lead to greater health problems long-term. When I do have an issue, the research*

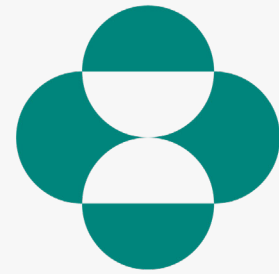
*does reflect my experience of visiting a pharmacist before I would go to my GP. In the context of moving away from family and being in college, there was a barrier in the form of having to identify a new GP and not knowing how to, and it being harder than ever before to get set up a GP. So, if something does happen when you're young there are so many barriers. In addition, and linked to previous experience, it can be hard to know the different thresholds of care, and what you need. For example, when do you need to go to your GP, when do you need to go to the A&E department of the hospital? Without experience, young people are finding their way in the dark a little bit and this probably explains why people are moving to the internet for more information than ever before, there is an experience gap, compounded by barriers to access. From personal experience, and stories from friends and peers, there is also a condescension of young people when we present with certain issues and problems.*

*Being able to empower young people is a key component, I believe to improving the healthcare system. Enable us to have good relationships with people in health. Encourage adoption of health as a life skill among younger people. Some really great work in this regard has been done around sexual health and it has increased awareness of sexual health but let's make sure we're doing it around our general health too and when to spot the signs of something being wrong. Then, ensure we can have informed conversations with health professionals without the risk of being told "we're too young" or "you're in college and probably drinking alcohol". This is commonly experienced by young women in particular who may be trying to access contraception, or even cancer facilities.*

# ABOUT MSD

MSD Ireland is one of the country's leading healthcare companies, having first established here over 50 years ago. The company has a dynamic and diverse team of over 3,000 employees currently working across six sites in Ballydine, Co Tipperary, Brinny, Co Cork, Dunboyne, Co Meath, Carlow and Dublin, and, in addition, operate substantial Human Health and Animal Health businesses. At MSD Ireland, we work at the forefront of science and technology to advance manufacturing excellence and R&D across our Irish sites and global company network. With a long-standing footprint in Ireland, our Irish sites manufacture approximately half of MSD's top 20 products, helping save and enhance lives in over 140 countries around the world.





**MSD**