Empowering the Net Generation to Make the Most of Self-Care

2019

Self Care
Be Your Best

SANOFI
How can we improve the lives of two billion people?

Despite the fact that we live in a world of constant change and evolution, one aspect has remained constant in each of our lives. The importance of health. In fact, with people living longer, the proliferation of chronic diseases and the speed with which we live our lives affecting our health, healthcare systems are close to collapsing if we do not act fast.

If we want to have a healthy future, a healthy society and a healthy economy, we need to do better at improving the health of the global population.

At Sanofi, we believe that better practice of self-care can help create this better future for us all.

This year, to mark International Self Care Day (24th July), we decided to look at a particular population group that will have a significant impact on the world of tomorrow. The Net Generation. Born between 1981 and 1996 and making up about a quarter of the global population, they are the world’s most powerful consumers and they are the future.

But this generation has grown up very differently than previous generations. They hold a unique point of view on self-care, which is changing how we practice and promote it.

So what does this group of two billion people think about self-care?

How do they practice it and what’s missing?

How can we help?

The "Be Your Best 2019 – Empowering the Net Generation to Make the Most of Self-Care" report reveals how this group of consumers is shaping the future of self-care and what matters to them most. We interviewed 3,200 Net Generation consumers, pharmacists and general practitioners (GPs) across eight countries to get the answers to these questions and highlight the pressing issues that governments, industry and other key stakeholders must act on to empower this generation to lead healthier, fuller lives.

What we found was fascinating.

The three things that matter most to this generation is wellness, access to credible information from health care professionals, and convenience. However, while self-care is central to their lives, their version appears to be more aspiration than action. Across all countries, consumers focus on treating their health issues as they occur rather than preventing future ailments. Nevertheless, they are conscious of the need to change and 45% stated they hope to shift towards prevention in the future.

As digital natives, they are continually searching for relevant and reliable information to inform their purchases, 43% look for information on better self-care weekly. The internet is considered the most important source, above pharmacists and GPs. While GPs and pharmacists generally agree that the internet can support patients, 73% remain concerned that it also causes unnecessary worry. Access to the right information is key.

We also found a disconnect in the perception of good practice of self-care. While 75% of consumers are confident that they maintain a good level of health through self-care, 59% of HCPs feel they do not perform self-care sufficiently. There is also a low understanding among consumers about managing conditions with over-the-counter (OTC) treatment (14%). Health literacy is simultaneously the top driver and the biggest barrier to self-care. GPs and pharmacists feel access to better education on self-care is a must.

Finally, the findings identified that this generation’s self-care needs are not all being met. Less than one-third feel well informed about self-care options available in healthcare systems.

Self-care ultimately saves both time and resources for healthcare systems. It can reduce public spending on treatments and visits to doctors for ailments that can be treated with self-care options such as allergies, digestive troubles and pain. For example, in the U.S., every $1 spent on OTC medicine, saves the healthcare system over $71 and nearly $95 billion in clinical cost savings (avoided doctor’s office visits and diagnostic testing). As the Net Generation is already looking to avoid doctor visits for convenience, it is primed to make the most of the opportunity to increase its understanding of what good self-care means.

Central to many of the gaps we found is information. We absolutely need to improve the health literacy of consumers. Healthcare practitioners, GPs, governments, policymakers and industry need to step up and take on the vital role of providing the right information and education. But we also need to ensure we do it in a way the Net Generation can relate to and provide it when and where they want it. Empowering them to make the most of self-care means embracing smart technology, e-commerce, data-led solutions such as video consultations and new, innovative products.

At Sanofi, we want to be real partners in change. We intend to collaborate with all key stakeholders to deliver new solutions that add true value to consumers’ lives. By elevating self-care as an essential pillar for sustainable healthcare systems and addressing the gaps found in this report, we can ensure a healthy population that understands self-treatment and practices it effectively.

Alan Main
Executive Vice President
Head of Sanofi Consumer Healthcare

1. CHPA 2019 Research Report access http://overthecountervalue.org/
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The Net Generation and Self-Care

These days, everything is connected. Before starting our research, it was important to consider the cultural, social and political issues shaping the world that inform how this generation currently promotes and practice self-care.

The Net Generation time is now

- **As one of the largest generations in history**, this group is reaching its most influential years – in terms of purchasing power, social mobility and taking the ‘big’ decisions in their lives.

- **Its affinity for technology has already changed consumerism** – and will do so for decades to come. With product information, reviews and price comparisons at its fingertips – this generation seeks brands that offer convenience and the best value or lowest cost.

- **Wellness is not just a fad; it is a way of life.** This generation exercises more, eats smarter, smokes and drinks less than previous generations.

- **This generation is willing to act.** They have grown up in a time of rapid change, giving them a set of priorities and behaviours markedly different to their parents. If they are not particularly satisfied with their financial situations, jobs, governments and society, they will comment and head to social media to speak up on the issues.
What about the future?

Self-care can play a crucial role in responding to the challenges posed by ageing populations and chronic disease management – helping to ease pressure on healthcare systems.

As a leading provider of consumer health products and solutions, we advocate for actions that harness the power of self-care for healthier and fuller lives, including:

1. New efforts and initiatives that improve health literacy and understanding of self-care, giving people the knowledge to make informed decisions about their own health.

2. Increasing access to safe, effective and convenient self-care products and solutions – allowing people to relieve symptoms and issues that affect their lives.

3. Supporting the creation of more efficient and consistent regulatory pathways, to bring new self-care solutions to those in need, through product innovation, and where appropriate, in switching products from prescription to non-prescription status.

The current self-care picture

- Self-care refers to activities that empower people to improve their own health, enhance wellbeing, prevent disease, curb illness and restore health. It includes making healthy lifestyle choices, self-monitoring and self-managing symptoms and using OTC medicines safely and responsibly.

- Ageing populations and increasing resource needs for chronic diseases management are pushing the world’s health systems to the brink. Policy and political attention has started to turn to prevention, public health and the role of individuals to make healthier choices.

- That’s where self-care comes in. Self-care can empower people to take an active role in managing and controlling their health. When this happens, healthcare resources are used more effectively, creating more sustainable health systems and improving lives.

- How people practice and promote self-care is changing in unpredictable ways; the consumer journey is rapidly evolving, affecting how people are informed, interact with HCPs and purchase self-care products.

- Digitally native consumers, e-commerce, big data and demographically dynamic emerging markets are factors already changing the OTC market and shaping the future of self-care.
Key Findings

We explored three key aspects of self-care, identifying trends and disconnects between consumers and healthcare practitioners (GPs and pharmacists) from the Net Generation.

**Beliefs**
The self-care attitudes, understanding and beliefs of this generation.

**Practices**
The actions taken by this generation when practicing self-care.

**Aspirations**
What this generation wants from self-care in the future.

### WHAT DOES SELF-CARE MEAN TO THE NET GENERATION?

53% associate the phrase with leading an active lifestyle.

60% link it strongly to ‘eating clean.’

Other key dimensions of self-care for the Net Generation include: health tracking (27%), achieving a good work-life balance (28%), mitigating health risks (32%), and having a skincare routine (25%).

57% of consumers associated sleep with self-care, but they do not necessarily know how to prevent or treat issues.

Moreover, 57% said they would rather deal with or treat a minor condition themselves, rather than have the inconvenience of visiting a doctor. HCPs broadly concurred – with 87% strongly agreeing that, primarily, patients should perform self-care for minor conditions.

#self-care

This generation talks about mental health with real openness and awareness via social media. State of mind is a central theme of online conversations. Across the globe, self-care is strongly linked to mental health and wellbeing and the benefits of self-care are associated with combating stress, anxiety and depression.

Beauty and personal care are also important means of social media engagement – not just related to improving appearance, but also as a means to cope with difficult situations and feel empowered. Overall, the Net Generation has a very positive, can-do attitude towards its version of self-care - seeking autonomy to make choices that matter most to it.
Typically, **20% of consumers experience a minor health condition at least once a week**, with a third once a month and another third at least once a year. Those in the USA appear to be considerably more susceptible (35% reported a minor condition at least once a week; with 17% reporting daily incidence). Regular use of medication (both prescription and OTC) and more frequent visits to both doctors and pharmacies were more common in the UK and USA vs other countries.

The most common OTC purchases by category were for:

- **60%** for colds, coughs and fever
- **54%** for headache

Other regular purchases were for **gastrointestinal issues, vitamins and minerals and allergies**.

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**If it works for me...**

This generation of consumers know what they like and so it was no surprise they select OTC products they know work for them. **The internet is the main source of information for 50% of consumers**, but they also take recommendations from pharmacists (22%) more commonly than recommendations from doctors (19%) or friends (19%).

Consumers and HCPs ranked **efficacy** as the most important attribute when selecting or recommending OTC products. Consumers also looked for rapid symptom relief followed by safety/tolerability. Price-performance ratio was the next most important attribute for consumers, coming above safety for those in Brazil, France and the UK.

The average consumer spends **€24 a month** on OTC products, ranging from the equivalent of **€17 in Japan to €40 in the USA**.

Whilst online research is their main source of information on OTC products, **71% of consumers prefer to visit a pharmacy to purchase them**.

Around three quarters of consumers have **already decided** which type of product they will purchase before entering a physical or online store, although only half know which brand they want and many make last-minute decisions.
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Healthy eating is viewed as fundamental to positive mental health. Creating time and space for oneself, or simply avoiding stressful social situations, are common themes on social media. Yoga, as an important restorative self-care practice, also featured heavily in related social conversations.

The Net Generation believes that staying healthy starts with eating well. Consumers revealed their most frequent self-care activities were – alongside taking exercise:

- 71% paying attention to diet/weight
- 64% consuming foods/beverages with natural health benefits

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They’ve got this…or have they?

Except for those in Japan, consumers are confident self-carers. Three quarters reported feeling very or somewhat confident that they maintain a good level of health through self-care. In China and South Africa, HCPs endorsed these consumer beliefs and were satisfied with their level of self-care. But in all other countries, there was stark contrast between consumer and HCP perception.

Those who felt they were falling short of their self-care goals attributed this to:

- lack of physical exercise (24%)
- poor diet (21%)
- poor work-life balance (18%)
- general lack of time and effort (18%) from the Net Generation feel that consumers from their generation do not practice self-care sufficiently.

HCPs (51% GPs; 57% pharmacists) suggested consumers should rely less on doctors and take more responsibility for themselves.

HOW DOES THE NET GENERATION PRACTICE SELF-CARE (AND TALK ABOUT IT)?
What’s holding them back?

Despite 76% of consumers feeling very / somewhat confident about the health decisions they make, there is a disconnect between intention and action – especially when it comes to treating minor conditions.

Why is this?

Consumers say a lack of knowledge about health issues and treatment (31%) and worries about mistakes (27%) are the main barriers to self-treatment of minor conditions – 30% also lament a lack of time. Cost is a concern for many consumers (23%), but lower down the list.

More than 50% of HCPs believe self-care barriers were due to a lack of knowledge and advice (26% GPs; 27% pharmacists).

INFORMATION IS EVERYTHING

The Net Generation remains eager to learn more about how to practice self-care better.

Nearly 4 out of 5 seek information on staying healthy or treating a minor condition at least once a month and 43% at least once a week.

Across all countries, online search engines are the ‘go-to’ source of information. Consumers of most nationalities ranked search engine information as more important to them than information from their GPs. Only consumers in South Africa, France and the UK ranked pharmacists among the top three sources of information for self-care.

Let me Google that for you...

The most popular online minor condition-related searches were for general information on certain diseases or conditions, except in China where greater priority is placed on preparing for a visit to the doctor.

Consumers across all countries think online information provides them with valuable health advice, boosting their understanding and confidence when they visit their doctor.

GP s and pharmacists generally agreed that the internet can support patients, but

73% remained concerned that it also causes unnecessary worry.
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Self-care support from health systems

Only a third of consumers (32%) feel well informed about self-care services offered by their health system – most are indifferent (57%). The findings for GPs and pharmacists reflect a similar pattern. There is also a low understanding among consumers from the Net Generation about managing conditions with OTC treatment (14%).

Despite feeling relatively uninformed, 49% of consumers actually said they were ‘satisfied’ with services on offer from their health systems. Satisfaction was highest in the USA and lowest in Russia.

HCPs, on the other hand, were less content with support from health systems. Concerns centred on a lack of innovative and tailored solutions, as well as a lack of transparency around the range of services.

WHAT DOES THE NET GENERATION WANT IN THE FUTURE?

58% Keep fit  52% Feel good  49% Manage stress

Across all countries, consumers focus on treating their health issues as they occur, rather than trying to prevent future ailments, with HCPs adding that this focus on treatment over prevention must change. That said, 45% of consumers stated they hope to shift towards prevention, with the strongest desire amongst those in South Africa, Brazil and Russia.

HCPs agreed and highlighted other opportunities such as health monitoring to detect problems early. Notably, better education and knowledge of self-care was a top suggestion from both GPs and pharmacists (22% each).

Harnessing the benefits of OTC solutions

Consumers from this generation are driven by convenience, with 40% stating that it can be more convenient and quicker to visit a pharmacy than schedule a doctor’s appointment.

Another trend for treating minor conditions with OTC solutions was the availability of advice and recommendations from pharmacists. There was also support (21% of consumers) for the belief that OTC products can be just as effective as prescription products. This is less true in the Asian countries and in Japan, where self-care is still not promoted to a large extent.

Compared with consumers, HCPs felt more strongly (61%) about the convenience and time-saving benefits of self-treating minor conditions with OTC options.
Conclusions

- **Self-care is central to the lives of the Net Generation** – with an emphasis on wellness, diet, exercise and protecting mental health and wellbeing.

- The Net Generation associates self-care with **empowerment** (‘taking charge of their own lives, bodies and minds) and a sense of **escapism** (disconnecting from stress and trying to avoid ‘burnout’).

- The Net Generation version of self-care is aspirational, but **can be hard to maintain** with modern, everyday pressures – such as poor work-life balance, inability to exercise or eat healthy, and stress.

- The Net Generation **does not yet see the potential of OTC medications as a solution** for their self-care needs – even though they are keen to avoid the inconvenience of visiting a doctor.

- **Online search engines are the most important** resource for this generation’s self-care information and purchases – they listen, compare and choose products that work for them, even before visiting a shop or pharmacy.

- **Social media forms an extension** of self-care conversations, habits and practices of this generation – providing an important place to share experiences and seek information. Yet HCPs do not feel able to engage with consumers.

- **Knowledge about how best to perform self-care is a major issue** – delivering this in relevant and compelling ways (online, via social media etc.) must become an urgent priority for government and health systems.

- GPs and pharmacists share many of the same views as consumers but believe **consumers could learn and do more** to harness self-care to treat minor conditions and other everyday health issues.

- **Prevention of minor conditions and health issues** is a long-term goal for this generation’s self-care – even though many factors currently impede that. This is an important aspiration for consumers from the Net Generation and inspires them to act.

Methodology

**Fieldwork dates:** March to April 2019

**Methods:**

- Self-administered online interviews [20 minutes in length] – **conducted by Harris Interactive** between March to April 2019.

- Social listening: Analysis of approximately 2.7m social media posts from between March 2017 to April 2019. A shorter timeline (January to April 2019) was implemented for the US to ensure the data allowance did not skew towards this market. **Conducted by Pulsar.**

**Overview:** Research commissioned by Sanofi Consumer Healthcare was conducted in eight markets (France, UK, Russia, USA, Brazil, China, Japan, South Africa). It explored the attitudes of the Net Generation aged HCPs (GPs and pharmacists born between 1981 and 1996) as well as the same age group public, to understand how these key stakeholders are shaping the future landscape of self-care.
What Next?
Making the Most of Self-care

The *Empowering the Net Generation to Make the Most of Self-Care* research has revealed some incredibly important and urgent findings. These highlight actions that all self-care stakeholders can take in order to empower this generation to practice better self-care and live healthier, fuller lives.

**KEY ACTIONS TO EMPOWER THE NET GENERATION TO SELF-CARE**

1. **Elevate self-care as a sustainability priority**

   Self-care saves money for healthcare systems. When practiced effectively, it can reduce public spending on treatments and doctors’ visits for self-treatable conditions, such as allergies, digestive troubles or pain. The Net Generation already seek to avoid the inconvenience of visiting a doctor, so is primed to make the most of this opportunity.

   **Action:** Industry, civil society and other groups have a responsibility to ensure decision-makers understand the full value of self-care, and advocate policies that embed self-care and help ensure more sustainable healthcare systems.

2. **Prioritise access to effective self-care solutions**

   Optimal access to self-care solutions gives people the freedom to make their own decisions about how to improve their health and well-being. For certain minor conditions, treating with OTC products or products that were previously prescription-only and have been switched to non-prescription can actually lead to more efficient use of healthcare resources.

   **Action:** Healthcare decision-makers and industry must explore ways to increase access – safely – to OTC products that allow people to conveniently and quickly relieve symptoms that impact their lives.

3. **Supercharge health literacy**

   Informed patients and consumers bring great benefits to healthcare systems – armed with knowledge on how to maintain good health, prevent future health issues and address minor conditions as they arise. Although the Net Generation is information-savvy, it still needs and craves relevant content that helps it to make the best self-care choices possible.

   **Action:** Healthcare stakeholders and industry must focus on solutions that empower the Net Generation with the latest information. This means embracing digital platforms to deliver relevant content, in ways that support better self-care decisions.

4. **Engage the ‘Net Generation way’**

   Alongside provision of the latest self-care information, there is also a huge unmet need to take conversations to this generation – framing them in relevant ways.

   **Action:** Healthcare stakeholders should collaborate with this generation of innovators and influencers to better target engagement – ensuring content and messages speak to their point of view and inspire positive action.

5. **Unleash data to deliver targeted self-care**

   This generation of consumers is incredibly discerning – they research meticulously, compare ferociously and spend their money in ways that ensure maximum value. They want solutions, not just products – helping them to live the way they want, when they want.

   **Action:** Healthcare stakeholders and industry should promote an environment that will ensure appropriate access and responsible use of data to better understand consumers from the Net Generation. In doing so, they can build trust and deliver valuable solutions to empower self-care.

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