



Prioritizing brain health for Europe's youth

October 2022

Achieving full human potential and unlocking 45 billion years of higher-quality life requires focusing on six key priorities

Improve measurement of health with better data



Innovate more, and more quickly



Empower individuals to steward their own health



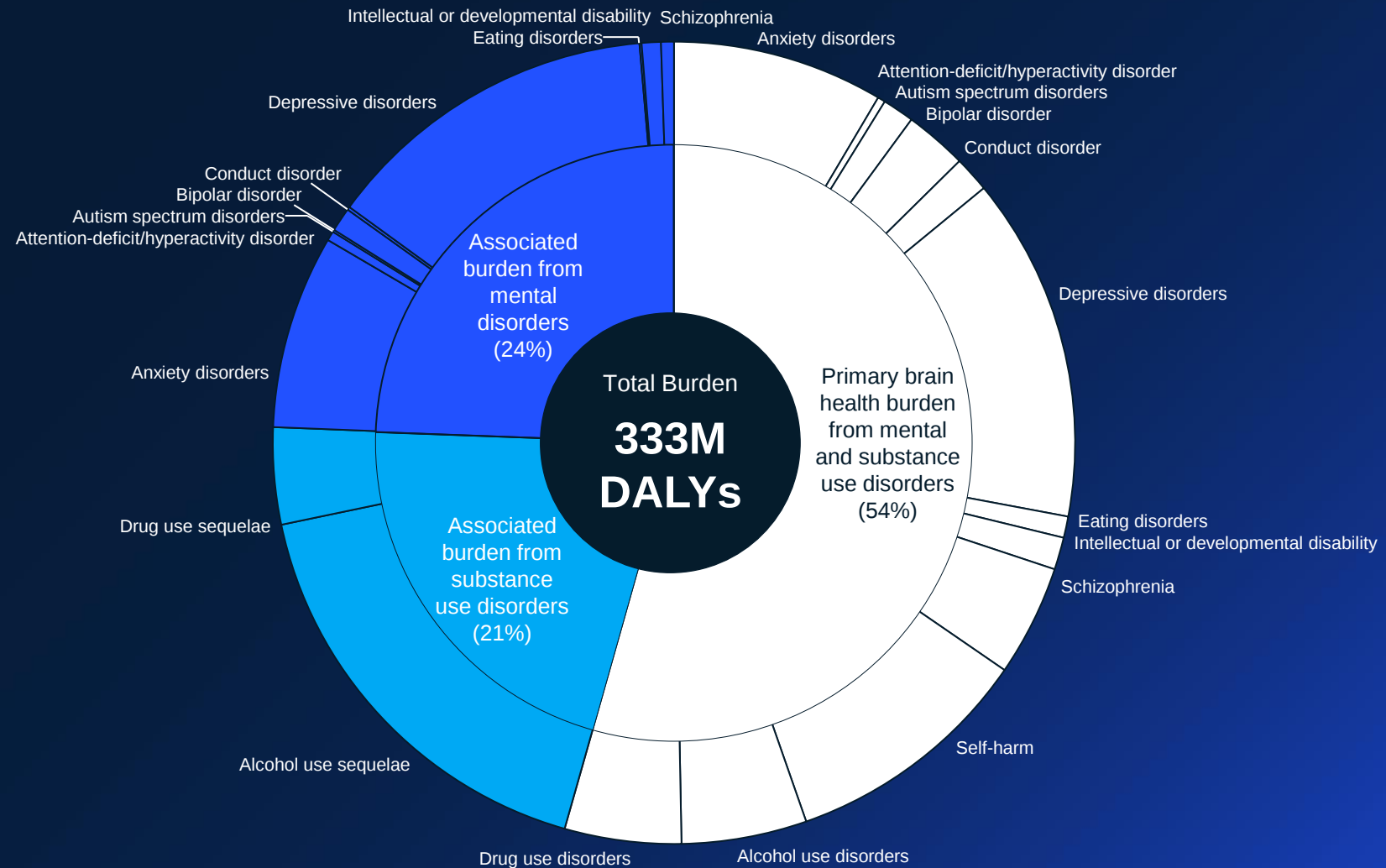
Invest more disproportionately on prevention and promoting optimal health

Scale what works

Unleash the full potential across industries

Mental and substance use disorder burden by type and condition

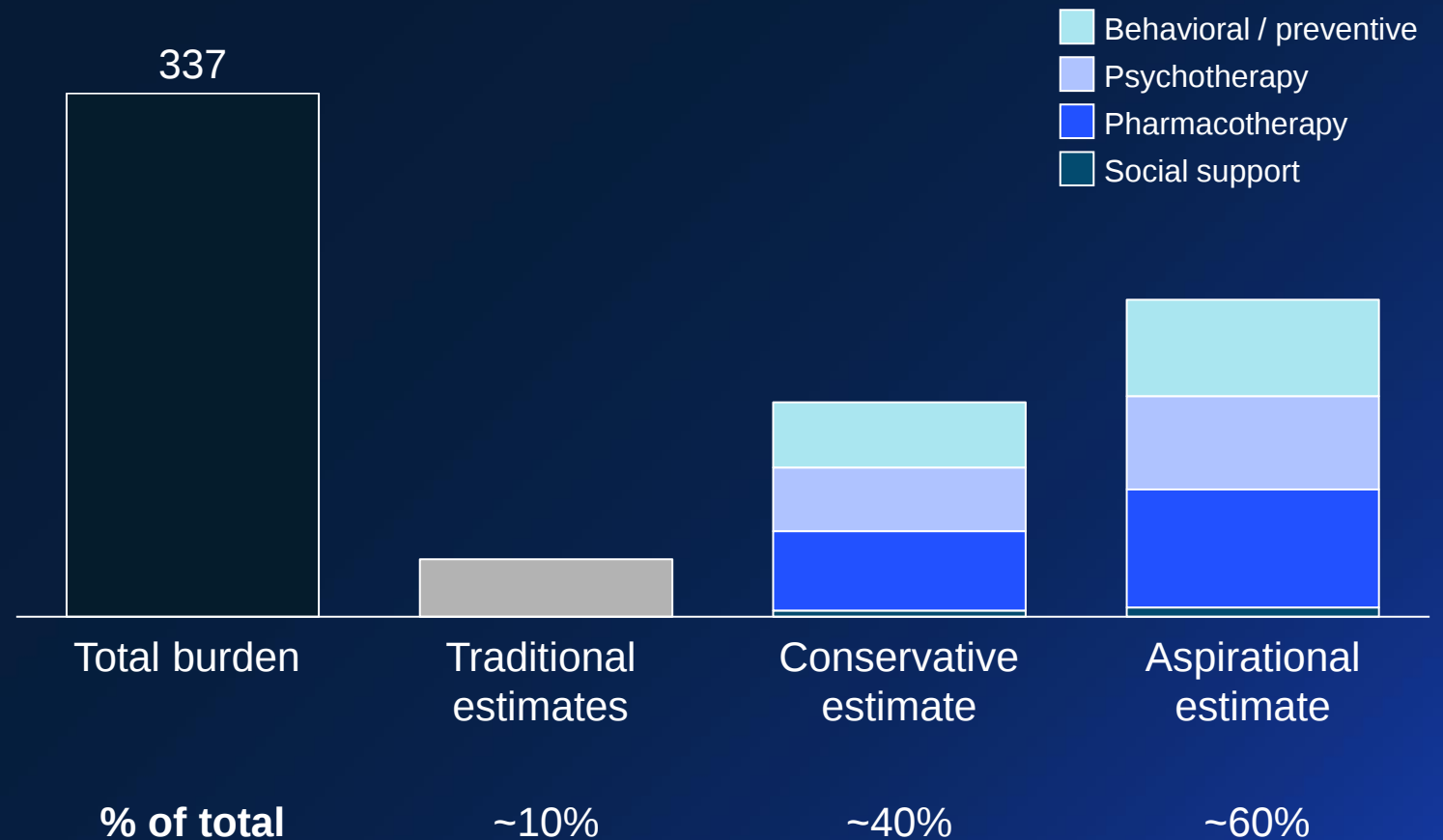
1: Associated burden is a major driver of lost years, contributing an additional 150M DALYs



**1: By scaling
what works, we
can reclaim
140-200M
life years**

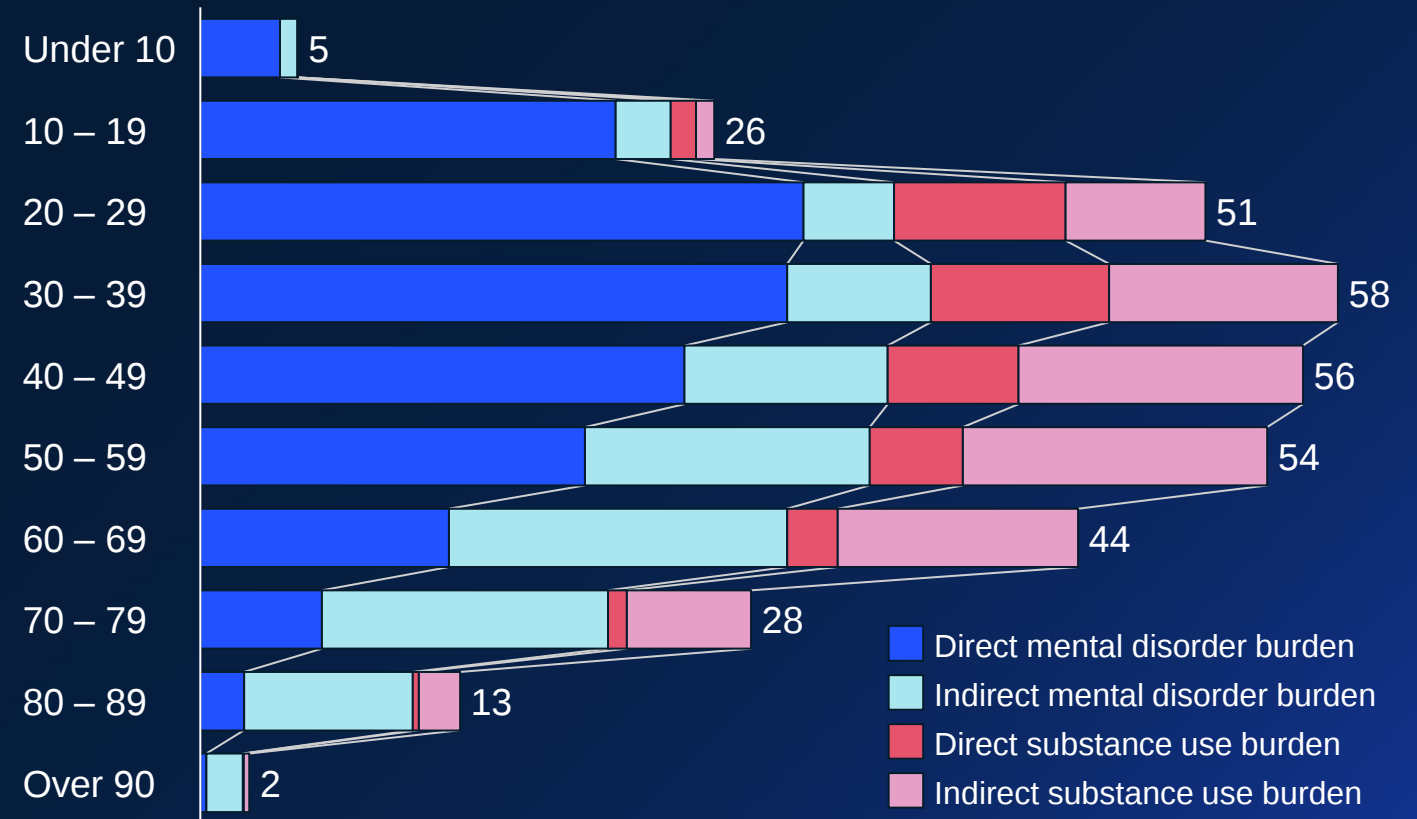
Addressable burden for mental and substance use disorders

Millions DALYs



1: We must prioritize early intervention to reclaim life years from mental and substance use burden

Disease burden by age group
Millions DALYs



While peak disease burden typically occurs around the 50s-60s for other chronic diseases, **mental and substance use burden peaks in the 30s, with nearly 90% reached before 30**

Meanwhile, **indirect burden only continues to expand through adulthood**

2: In 2022, MHI surveyed 11,000+ consumers in 11 countries...



... exploring 9 key topics on Mental Health...



Overall health and wellbeing



MH service utilization



MH in the workplace



MH among students



Spiritual health and religion



Attitudes towards MH



Social determinants of health



Global current events



Social Media and digital health services

... across 5 generations



Gen Z

18-24¹ years old



Millennials

25-40 years old



Gen X

41-56 years old



Baby Boomers

57-75 years old



Silent Generation

76-93 years old

1. For Ireland, includes some 13 – 17-year-olds

2: Selected survey insights, based upon guidance from European mental health experts

- A State of Gen Z Mental Health**
- B Support Networks**
- C Technology and Social Media**

2A: A higher proportion of European Gen Z respondents reported poor mental health compared to other generations...

~21% of European Gen Z respondents reported **poor mental health**, more than any other generation

~ 26% of European Gen Z respondents reported their **mental health has worsened** over the past three years, more than 2x the percentage of Baby Boomers

A higher proportion of European Gen Z respondents rated their **mental health** as **poor** compared to their physical, social, and spiritual health

2A: ... though this proportion varies between the average Gen Z respondents in each surveyed country

Percent of respondents who reported their mental health as poor or very poor, by generation across Europe:

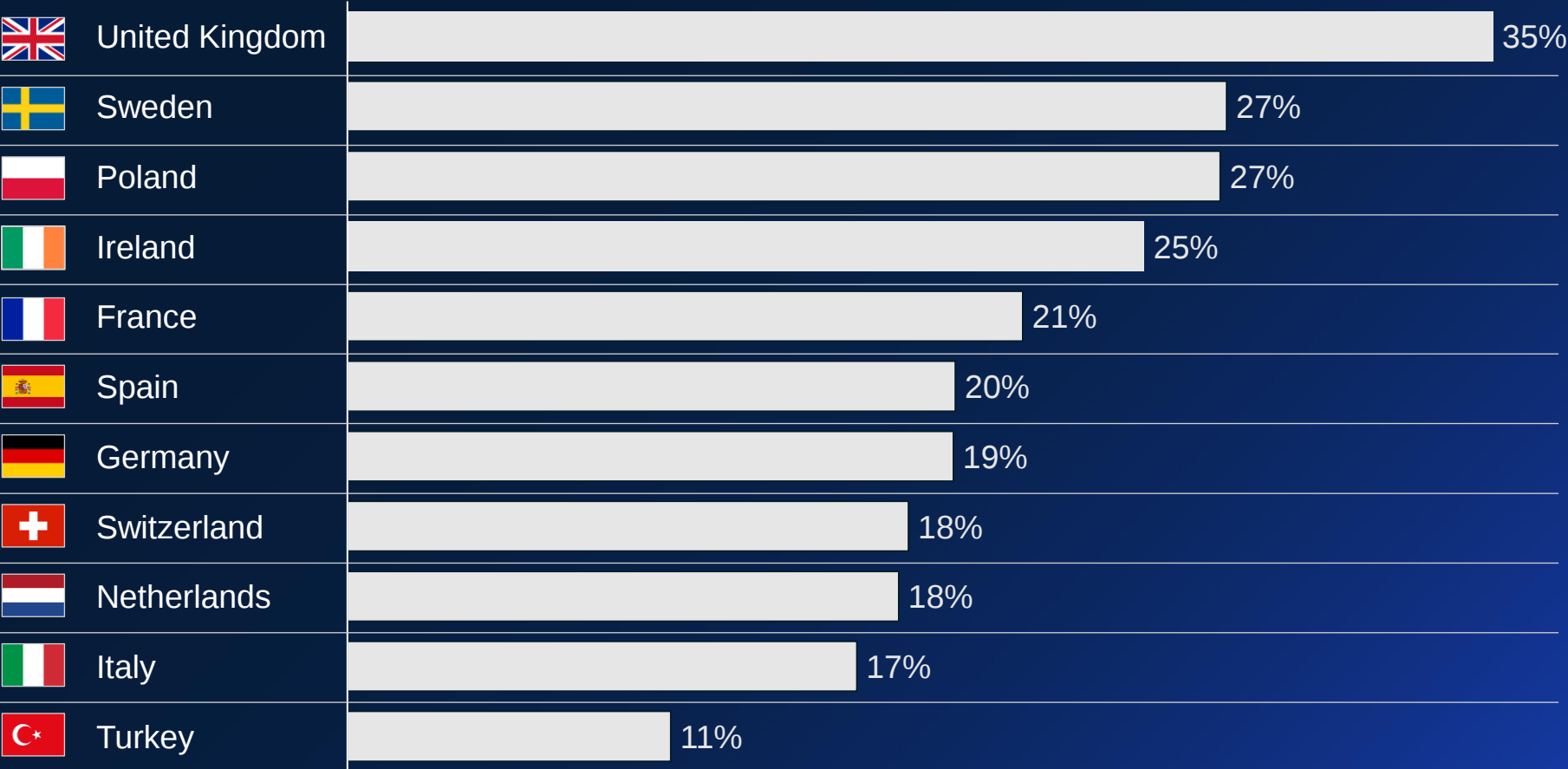
Gen Z: 22%

Millennial: 13%

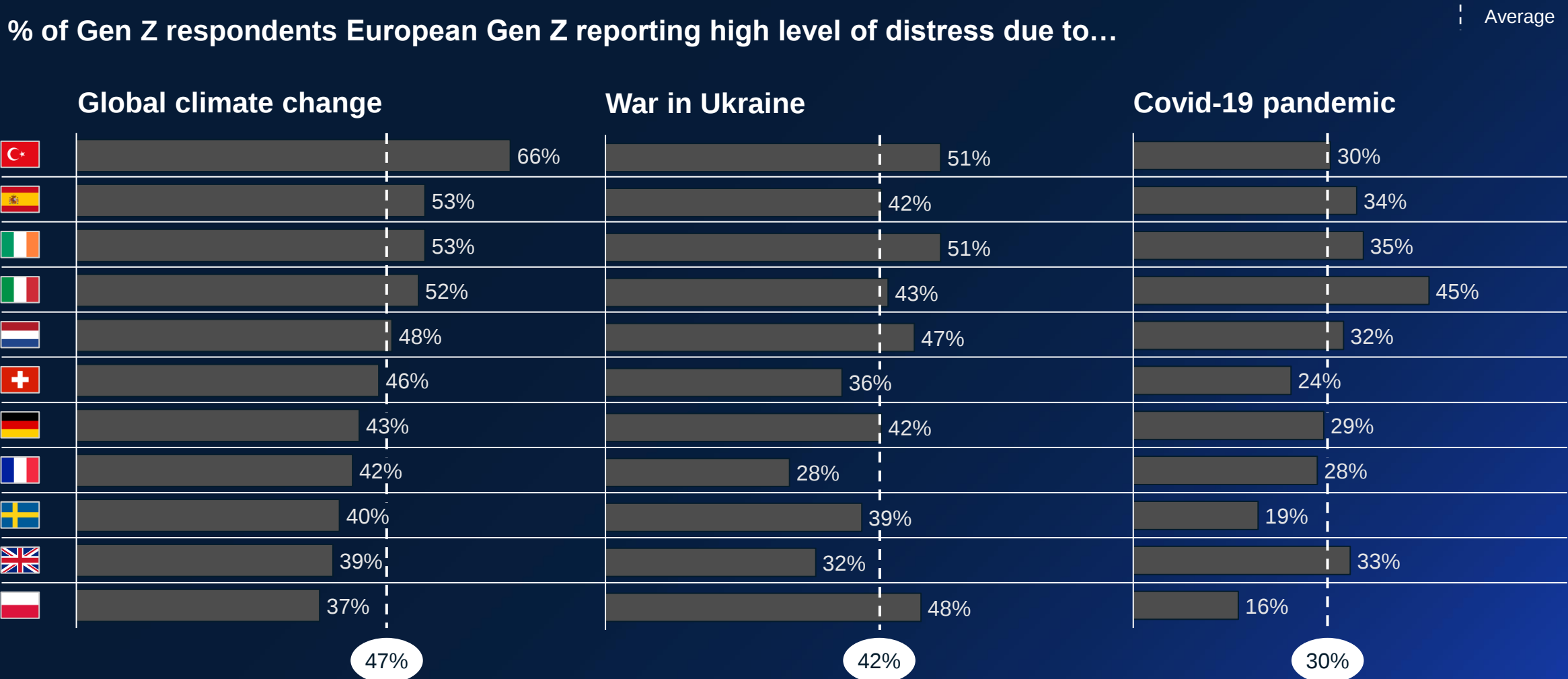
Gen X: 12%

Baby Boomers: 4%

% of Gen Z respondents who reported their mental health as poor or very poor

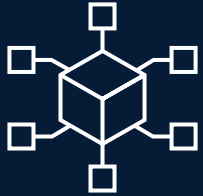


2A: European Gen Z face an unprecedented moment of global and regional crises



Note: High defined as >=7 in a scale 1 to 10
Note: Level of distress due to the War in Ukraine is proxied by distress related to global violence for Ireland

2B: Networks surrounding Gen Z may be engaged to meet the unique mental health needs of this generation



Personal support networks

1.4x

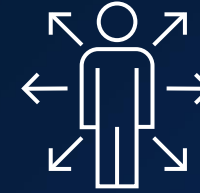
More European Gen Z respondents are **comfortable talking** about their mental health challenges **with friends than with family members** (vs. the same distribution for other generations¹)



School

30%

of European Gen Z student respondents reported that their **education institution's** (i.e., school, university, college) do not provide or do not know whether they provide **mental health resources**



Employer networks

2 out of 3

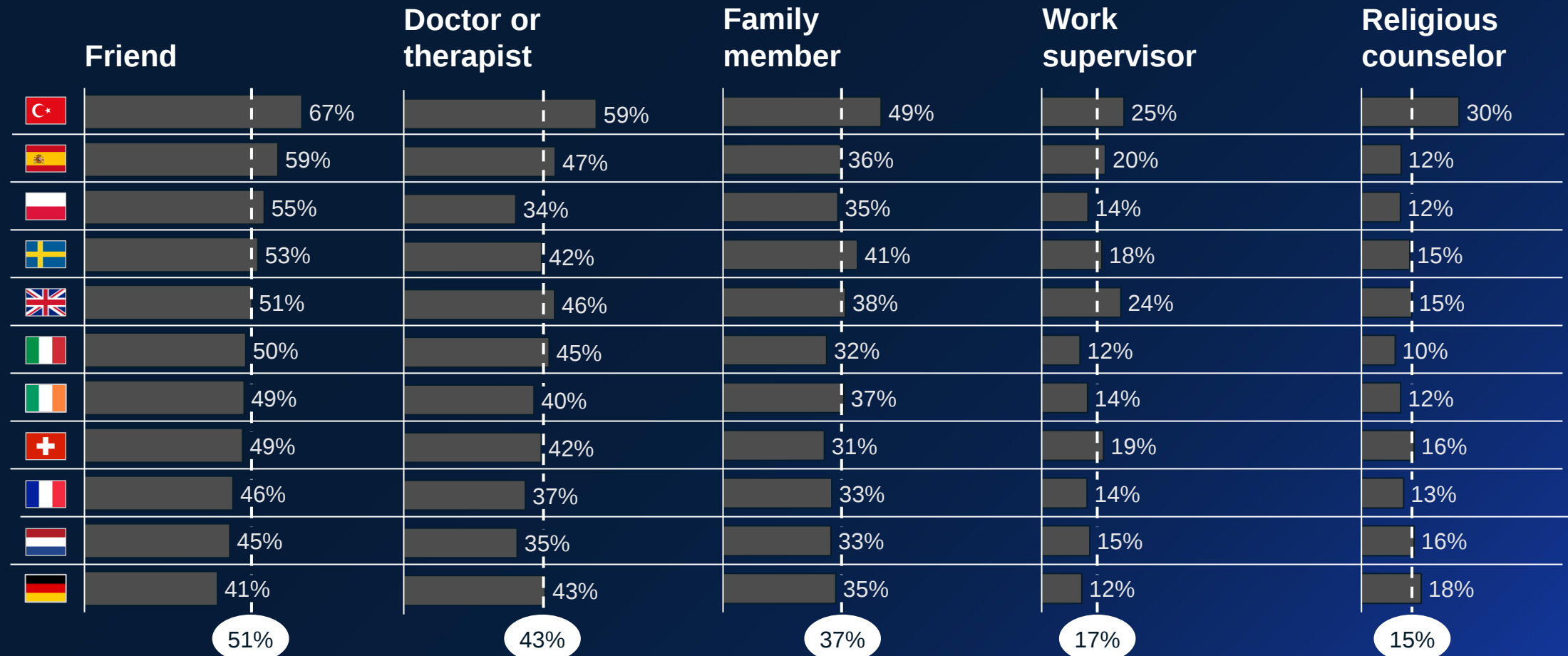
European Gen Z students reported that **mental health support** is important or very important in selecting a **future employer**

1. Other generations calculated as the weighted average of millennials, Gen X, baby boomers' responses

2B: Deep Dive: Gen Z reported trust in support networks by country

% of Gen Z respondents who report feeling comfortable talking about their mental health condition with a...

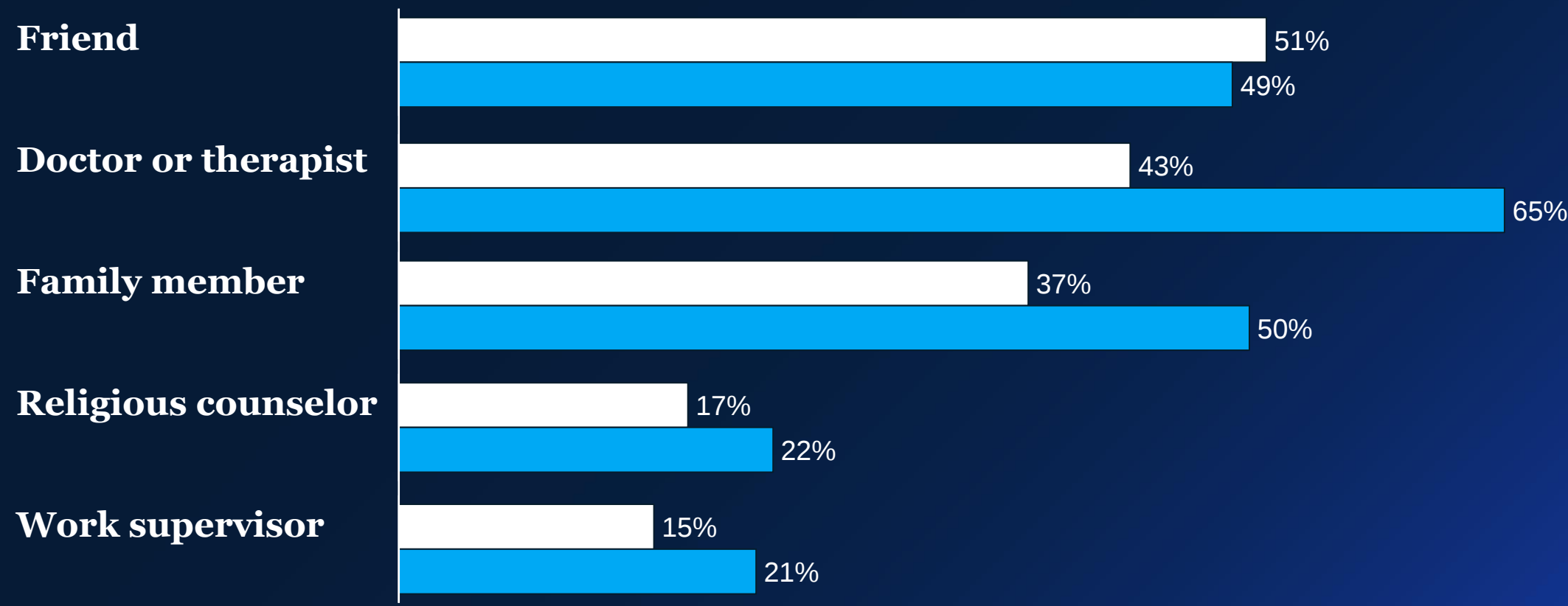
Average



2B: Deep Dive: European reported trust in support networks

% of European respondents who report feeling comfortable talking about their mental health condition to a...

■ Gen Z
■ Other generations¹

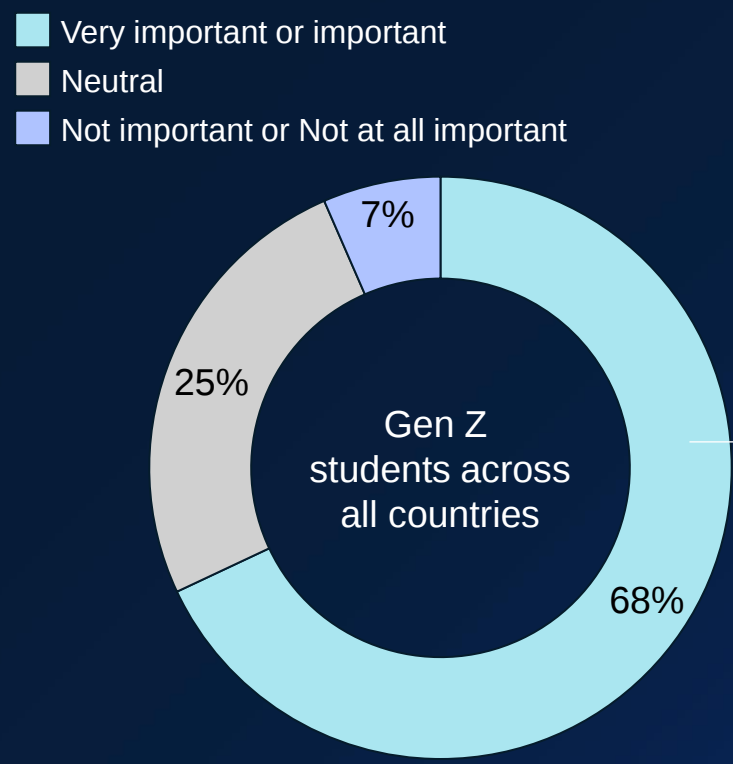


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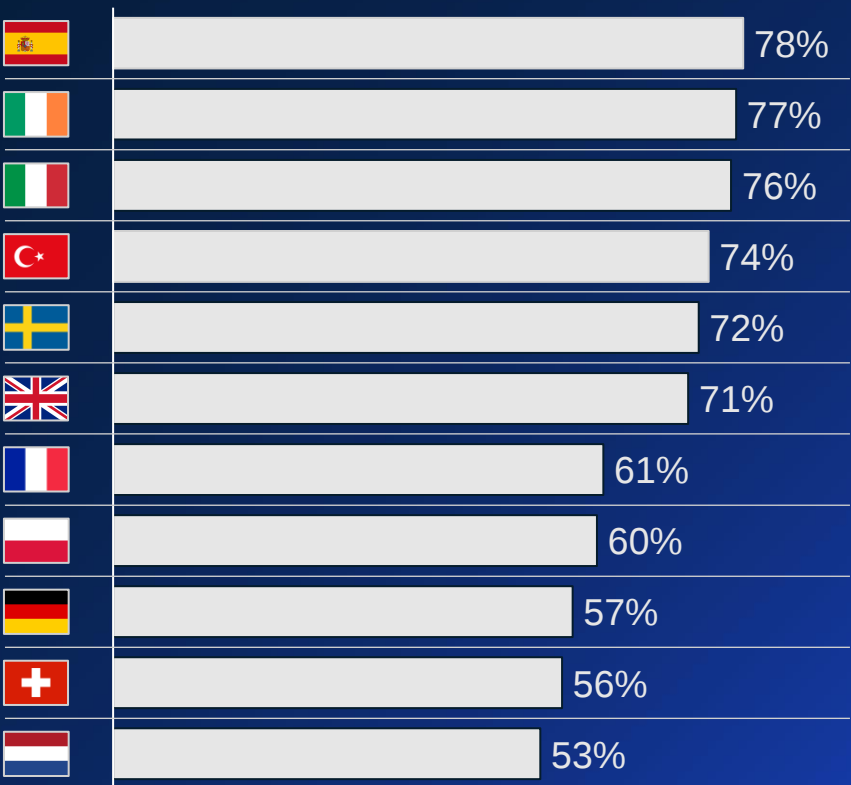
2B: Deep Dive: Importance of mental health support in employer selection by country

2 out of 3 Gen Z students surveyed across European countries reported that **mental health support** is very important or important in **selecting a future employer**

How important do you think mental health support¹ is in selecting a future employer?
% of Gen Z students



% of very important or important responses by country, for Gen Z students



2C: Technology & Social media are perceived as both risk and protective factors for youth mental health



Technology and social media

~32%

of European Gen Z respondents reported that technology and social media had a **negative impact** on their **mental health**, while

~26%

of European Gen Z respondents reported a **positive impact**



Screen time

~71%

of European Gen Z respondents reported that they **felt they spent too much time on screen or online in general**



Number of followers

~25%

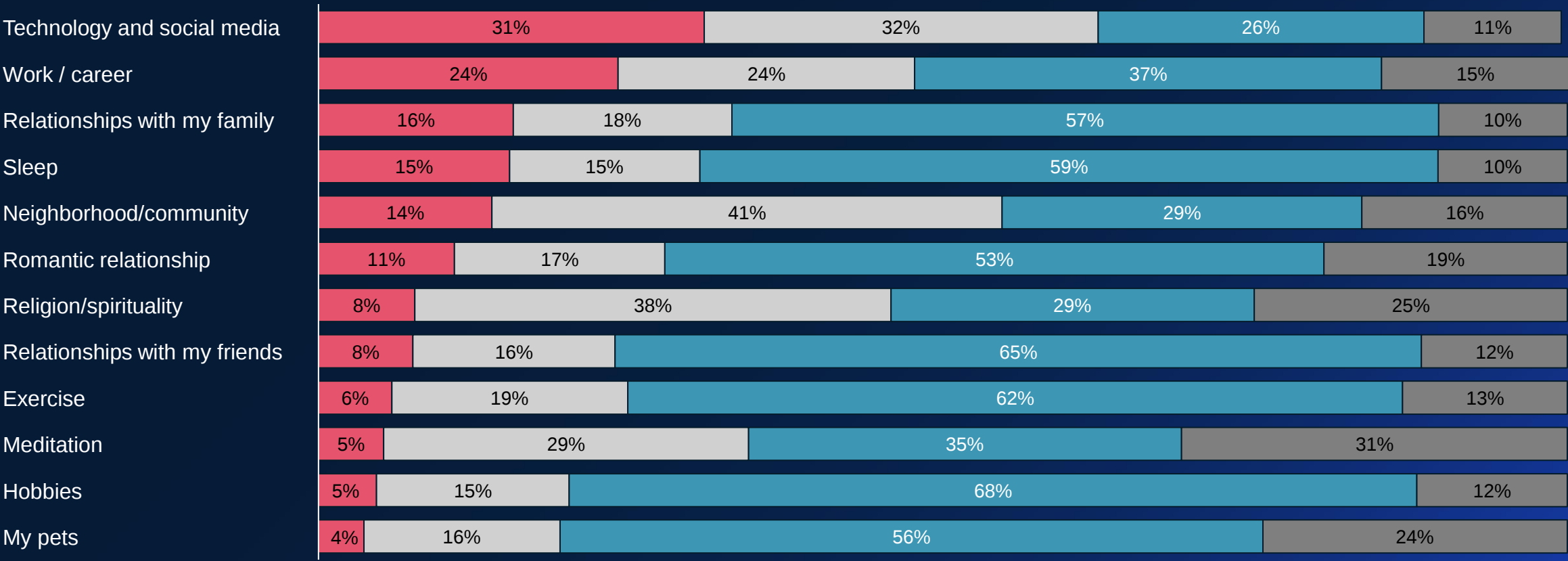
of European Gen Z respondents reported that the **number of followers / likes makes them feel better about themselves**

2C: Deep-dive : Reported factors affecting Gen Z mental health

Self- reported factors which affect their mental health, % of Gen Z respondents

■ Negatively impacts my mental health
 ■ Does not affect
 ■ Positively impacts
 ■ n.a.

Average 11 countries



We encourage you to collaborate with MHI to add years to life and life to years

Keep in the flow as an MHI collaborator

Join the dialogue as part of our ecosystem

Engage as a partner (e.g., sharing insights
on Gen Z mental health)

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Find out more on our engagement
platform at mckinsey.com/mhi

