

MILLENNIAL

MINDSET

Healthcare Marketing
to Millennials

OCT
2014

SPECIAL
REPORT



THE
WORRIED
WELL

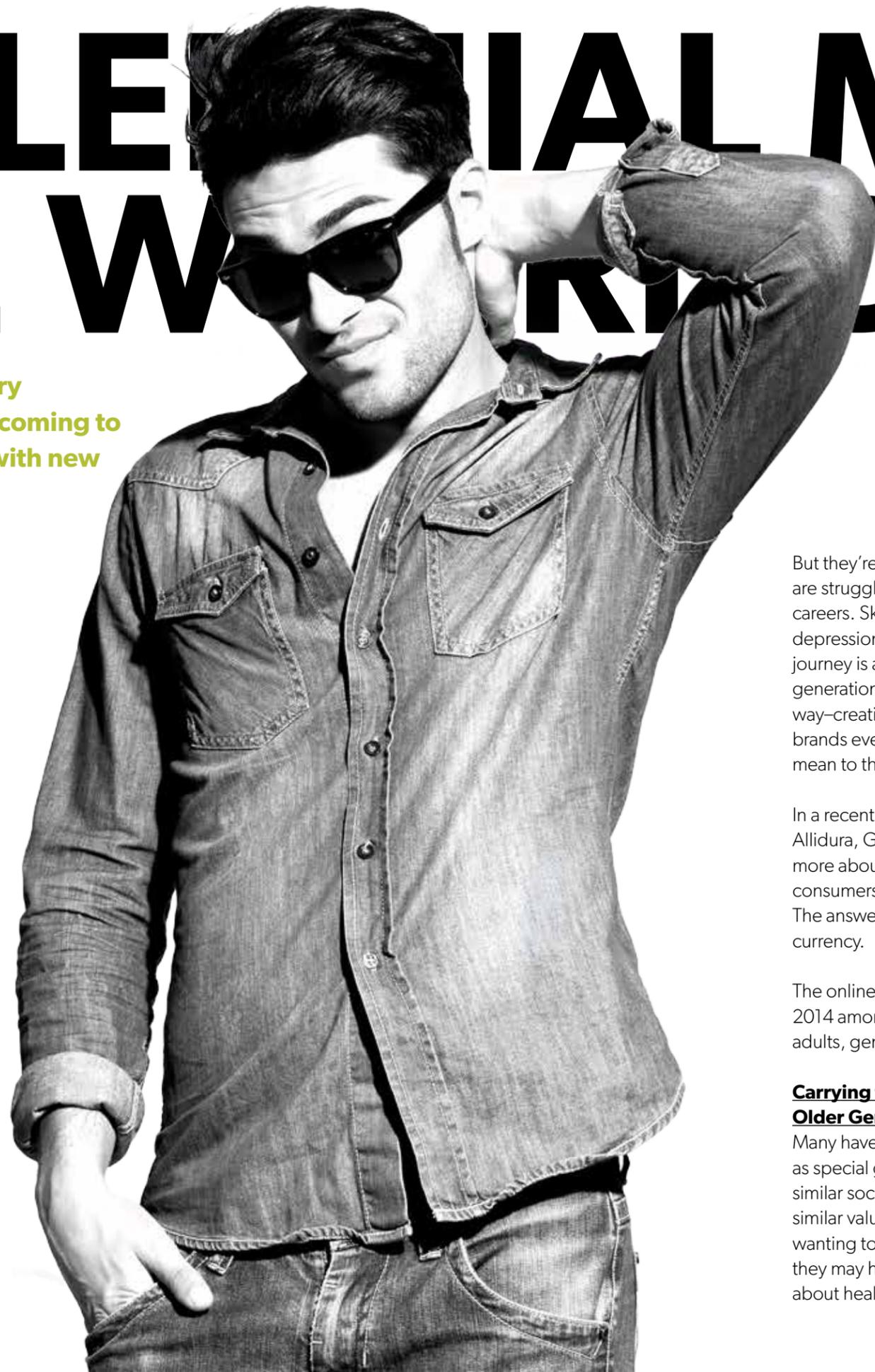
MILLENNIAL MINDSET: THE WORLD WELL

By Zach Gerber
and Kit Shea

Often described as the “Worry Generation,” millennials are coming to health and wellness brands with new needs and new challenges.

- If Pokémon cards were ever your playground currency...
- If you knew what LOL meant the first time you used it...
- If you can talk in great depth about every character on *Boy Meets World*...
- If your music collection started with *Now That's What I Call Music!*...
- If you've ever received a trophy without really knowing why...
- If you were more likely to hang out with your “buddies” on AIM than at the mall...

...You're probably a millennial adult.



These 18 to 32-year-olds are members of a generation that's more technically savvy, ambitious, and collaborative than the generations that came before them.

But they're also more likely to know people who are struggling to find jobs and launch their lives and careers. Skyrocketing levels of stress, anxiety, and depression going into adulthood, the millennial journey is a healthcare journey. And yet, like generations before them, they're making their own way—creating new roles for health and wellness brands even as they redefine what health and wellness mean to them.

In a recent Adult Millennials and Health study, Allidura, GSW, and Harris Poll teamed up to find out more about what this newest group of healthcare consumers needs from health and wellness brands. The answers start with personal utility and cultural currency.

The online study was conducted from May to June of 2014 among over 3,500 millennial teens, millennial adults, gen Xers, and baby boomers.

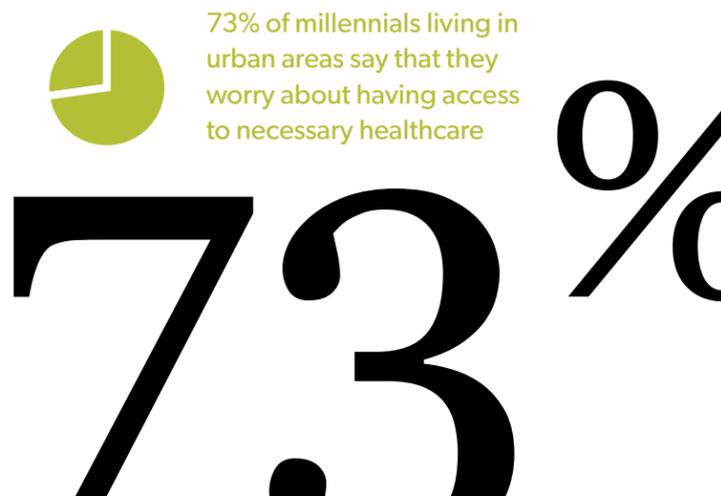
Carrying the Health Worries of a Much Older Generation

Many have compared millennials to baby boomers as special generations that have been shaped by similar socioeconomic shocks and grown to share similar values, like expecting integrity from others and wanting to live a meaningful life. But one commonality they may have never expected is a right-now concern about health.

As creators of the quantified-self movement, millennials are often perceived as healthier than their baby boomer counterparts. Yet millennials worry about health issues (such as getting a serious illness or affording the cost of healthcare) almost exactly as much as boomers. In fact, in some key categories—like having access to doctors and medication when they need it—millennials worry even more than baby boomers.

Millennials who have children and those who live in urban areas are even more likely to actively worry about some of these health issues compared to their counterparts. An alarming 73% of millennials living in urban areas say that they worry about having access to necessary healthcare.

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Living in a Stress-And-Search Cycle

Millennial adults are part of the first truly high-tech generation, but they were raised by the last of decidedly low-tech parents. They grew up with the Internet, the eventual ability to find anything, to compare themselves to anyone in an instant, but without the guidance on how to internalize that flood of information. As adults, their insatiable need for that constant digital context may be hurting their health.

Who influences them the most when it comes to their own health? Surprisingly, it's not always the health experts or popular celebrities. A large percentage of millennials trust information from friends and family over high-profile health experts.

Twenty-two percent of millennials trust celebrities when they are endorsing a food product. Sixty percent trust high-profile health experts like Dr. Oz.

And 84% trust information from

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84% trust information from people they know personally—such as friends or family

people they know personally (eg, friends and family).

As adults, they have always been equipped with resources such as WebMD. With these resources at their disposal, it doesn't take more than a couple clicks to self-diagnose and spiral into a panic about health. Not only has the medium in which they receive medical information changed, but they are also more negatively influenced by what they find online in comparison to gen Xers or baby boomers—37% of millennials sometimes self-diagnose themselves with health problems that they don't have (vs. 26% of gen Xers and 24% of baby boomers). So does technology become a self-perpetuating cycle for millennials? Forty-four percent say that viewing health information online causes them to worry about their health (vs. 32% of gen Xers and 24% of baby boomers).



It doesn't take more than a couple clicks to self-diagnose and spiral into a panic about health.

84%

DIGITAL

HEALTH



Who needs a family doctor when you have a grocery store?

It turns out that our hulking healthcare system—with its confusing cost structures and white-coated experts—isn't what millennials are pursuing, even as they express worry about their health. For them the question seems to be, not, who can help me but what can help me.

They're mashing up food trends with high-profile cleanses and intriguing new exercise offers to proactively live healthier lives—and keep the doctor away. In fact, 71% believe they're already doing everything they can to maintain a healthy lifestyle. These efforts show some indication that they may be attempting to avoid traditional healthcare altogether.

It may be because they think of healthcare as "sick care"—a system designed to restore their health, not maintain it. A majority (62%) see a healthcare professional reactively; that's significantly more than gen Xers or baby boomers (46% and 34%, respectively).

DIETARY

CHOICE



49%

49% have used a training program such as P90X, Insanity, or CrossFit in the past 2 years



42%

42% are willing to pay more for foods that are made with all-natural ingredients



36%

36% are willing to pay more for foods that are organic



33%

33% have used a cleanse in the past 2 years



33%

33% feel it is absolutely essential or very important to eat foods with little or no artificial ingredients



30%

30% have seen or talked to a nutritionist in the past 2 years



27%

27% are willing to pay more for foods that are free of GMOs



26%

26% have used diet pills in the past 2 years



25%

25% feel it is absolutely essential or very important to eat organic foods



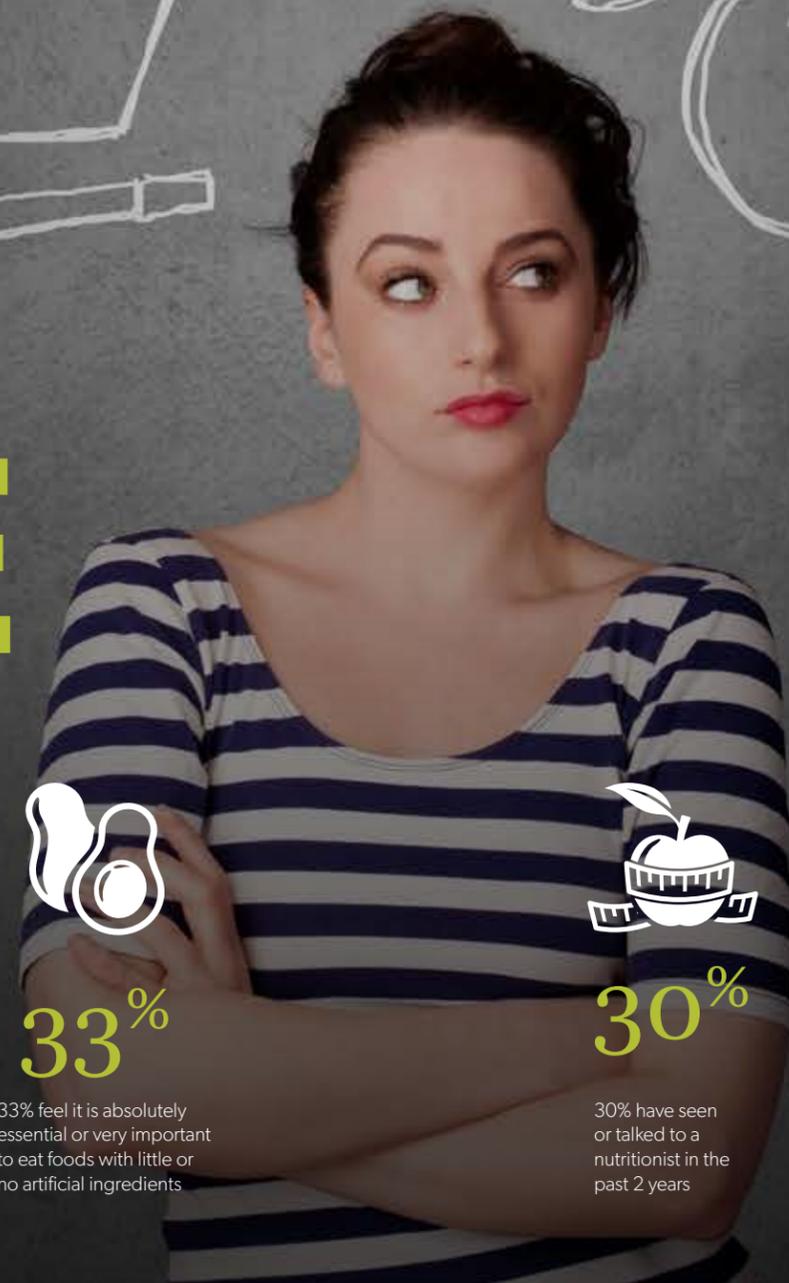
23%

23% are willing to pay more for foods that are made by a well-known brand



15%

15% feel it is absolutely essential or very important to eat gluten-free foods





HEALTHY

MINDSET

Mental Healthcare Is Primary Healthcare

The life-defining events that have shaped the formative years of this generation included the Columbine shootings, 9/11 attacks, corporate corruption scandals, and the war on terrorism. These experiences have made their choices in literature and movies decidedly dystopian—and, left them with a really simple life goal: happiness.¹

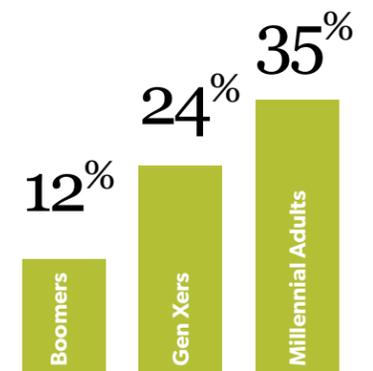
Almost all millennials (97%) say that being happy is important to them, and 95% say the same about being healthy.

But there is a strong disconnect between that goal and their everyday reality. When asked what best described them, 48% of millennials described themselves as happy,

and only 42% say they consider themselves healthy.

Millennial adults experience more stress than gen Xers or baby boomers. They're more likely to describe themselves as anxious, and more than 1 in 10 have been diagnosed with social phobia.

The study suggests that millennials see the mind-body connection as important to overall health. Thirty-five percent of them believe that seeing a therapist or psychiatrist regularly is essential or at least important to lead a healthy lifestyle. Millennial men are much more likely than their female counterparts to say this (42% vs.28%).



Seeing a psychologist or therapist regularly is important to lead a healthy lifestyle.

97% of millennials say that being happy is important to them

97%



A New Approach for Marketers

What this new study tells us is that marketing to millennials requires an approach that is fundamentally different from those we relied on for gen Xers and baby boomers. Successful marketing to this generation will rely on personal utility and emotional currency.

Millennials seek out brands that provide just-for-them utility with experiences that support their individual approaches to learning about and managing their own health—ones that merge “real” healthcare with personal wellness fueled by food, exercise, and social connections.

Another millennial study has shown that in the consumer world their favorite utility brands are Google, YouTube, Nintendo, and Apple. In healthcare, successful marketing will look much more like clever crossovers that merge life and health.² Think: Sanofi’s glucose monitor peripheral that snaps right into an iPhone or Nike’s Training Club, packed with personalized workouts.

Emotional currency is the other critical component of marketing to millennials. They’ll stick with brands that understand the important role of stress in their lives and health.

This isn’t a generation to address with scared-straight tactics like the sizzling eggs in this-is-your-brain-on-drugs advertisements. Instead it’s one that thinks of physical health as intricately connected with mental health. It needs brands that think about health and wellness the same way—brands that can help them understand what’s normal and create solutions that benefit them.

In their consumer lives, the brands that fill that emotional currency role are Lego, Wii by Nintendo, Oreo, and Red Cross.² In healthcare, millennials will look much more to brands that make important emotional connections. Like, Gilead bringing together people in an under-diagnosed population (Asian Americans) to learn about Hepatitis B at social events that included concerts or movies. Or Gilenya rallying people living with MS to say “take that, MS” with empowering ads that featured users sticking their tongues out at the disease. Coke made the connection, too, with its cross-product focus on happiness.

These brands deliver the personal utility and emotional currency that let millennials choose healthcare on their terms—ones that are as unique to this generation as flannel shirts were to the one before it.

SPECIAL REPORT

ABOUT ALLIDURA:

Allidura Consumer, part of InVentiv Health, is a communications agency that specializes in designing health and wellness strategies for consumer product goods and companies. As society shifts its focus from the treatment of disease to prevention and wellness, there is more responsibility on consumers and, in turn, consumers expect more from their brands.

Allidura’s unique perspective and proprietary approaches help brands create powerful connections between consumers and health influencers—from journalists and nutritionists to doctors and government advisors. The programs we develop drive value, build loyalty, protect and restore reputations, and enhance brand perception over time. Allidura’s depth of experience and knowledge of health and wellness are unmatched by any other agency. At a time when people believe nearly everything impacts health and everyone has something to say about it, our clients find our perspective to be invaluable. You can learn more about Allidura Consumer at www.allidura.com.

ABOUT GSW:

GSW is a full-service healthcare communications agency that goes beyond advertising to create personalized brand experiences that involve, inspire, educate, and activate people through ongoing brand journeys. MedAd News’ and MM&M’s 2014 Agency of the Year, GSW turns messages into brand experiences that transform people into success stories. Building partnerships with pharmaceutical, biotech, and health-and-wellness clients in 18 major markets around the world, GSW creates marketing solutions through a comprehensive and wide array of services including advertising, digital and closed-loop marketing, strategic insight, branding, communications planning, predictive modeling, market access strategies, media and market research. The agency is led by a team of best-in-class marketers who have experience with a variety of stakeholders such as healthcare professionals, patients, caregivers, payors, and consumers. GSW is part of InVentiv Health Communications (iHC), the InVentiv Health Division dedicated to delivering exceptional, global, multichannel communications to organizations focused on health and wellness. For more information visit www.gsw-w.com.

ABOUT THE HARRIS POLL

Over the last 5 decades, Harris Polls have become media staples. With comprehensive experience and precise technique in public opinion polling, along with a proven track record of uncovering consumers’ motivations and behaviors, The Harris Poll has gained strong brand recognition around the world. The Harris Poll offers a diverse portfolio of proprietary client solutions to transform relevant insights into actionable foresight for a wide range of industries including health care, technology, public affairs, energy, telecommunications, financial services, insurance, media, retail, restaurant, and consumer packaged goods. Contact us at ConsumerInsights.NAInfo@nielsen.com for more information.

EXCLUSIVE REPORT
FROM ALLIDURA, GSW,
AND THE HARRIS POLL



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About the Millennials and Health Study

The millennials and health survey was administered online within the United States between May 21 and June 4, 2014, among 500 US teens ages 13-17 (Millennial teens); 2,015 US adults ages 18-32 (Millennial adults); 508 US adults ages 33-49 (Gen Xers); and 507 US adults ages 50-68 (Baby Boomers). Harris Poll conducted the research.

Sources:

¹ U.S. Chamber of Commerce Foundation: The Millennial Generation Research Review
<http://www.uschamberfoundation.org/millennial-generation-research-review>

² Vision Critical's Brand Equity Relationship Assessment
<http://www.mediapost.com/publications/article/210230/millennials-everyone-else-love-different-brands.html>