ENGAGING THE WORRIED WELL:
SEVEN BRANDS THAT ARE SUCCEEDING WITH MILLENNIALS
MIllENNIal MINDSET:
FOR HEALTHCARE BRANDS

When it comes to [just about anything], millennials expect it their way. The digital world that they grew up in has shaped their needs and expectations. From the need for immediate answers to the desire to pick and choose their own perfect-fit features, millennials are increasingly expecting brands to work the way they do.

This is especially true when it comes to health and wellness. They don’t just want a health brand to change or omit its logo. They want health and wellness brands to redesign themselves to mirror the millennial mindset and fit into their complex, stressful lives.

Their new expectations are creating big new challenges and intriguing opportunities for brands that want to capture their attention and earn their loyalty.

In our first report, “The Millennial Mindset: The Worried Well,” Allidura and GSW collaborated with Harris Poll to uncover critical insights into the mindset of millennials and how their perspectives are changing the future of healthcare.

Now, we put our findings into action with new insights. Each includes exciting new data and an example of a recognized health and wellness brand that is doing it right.

WHO ARE THE WORRIED WELL?

A generation of 18-32 year olds who grew up with remarkable access to healthcare information and internalized all the stress that self-diagnosing and self-assessing created. And stress? It’s a huge part of how they think about their health. They’re the most likely to focus in on the importance of the mind-body connection. But they’re also wary. They see the healthcare system as sick care and they’d much rather chisel up their own unique blend of well care.

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 and gen Xers. 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’ SEVEN MAXIMS FOR HEALTHCARE BRANDS

How can your brand connect with this influential generation? Millennial healthcare behaviors and attitudes tell us a lot about what they value—and what they don’t. These seven maxims reveal the expectations the generation has for healthcare communications and from healthcare companies.

01. WE’RE DIFFERENT. YOU SHOULD BE, TOO.
02. WE’LL PASS ON THE SICK CARE, THANK YOU.
03. HAPPINESS AND HEALTHINESS ARE INTERTWINED.
04. DO GOOD WITH US.
05. BE THERE WHEN WE NEED YOU—AND DON’T FREAK US OUT.
06. HELP US FIND BALANCE.
07. SHOW YOUR SOURCES.
Oscar is a health insurance start-up that believes insurance should be simple, human, and smart. It targets young adult millennials and leverages new technology to stay on the cutting edge.

Oscar’s target: the 52% of millennials who agree that health insurance (or lack of insurance) sometimes prevents them from seeking the care they need.

To reach them, the team at Oscar knew they had to change the interface of healthcare to custom-fit it to millennials’ lives. Millennials wouldn’t accept the unfriendly user experience and confusing cost structures of the legacy health insurance landscape. They needed an entirely new approach.

Oscar delivered it. It lets members speak with a board-certified doctor within an hour of their request, 24 hours a day, 7 days a week via virtually any device. This telemedicine approach fits into the busy lives of millennials and

Health insurance says a lot about millennial health: 73% of those with insurance say they are doing everything they can to maintain a healthy lifestyle, while only 61% of those without insurance agree with that statement.
reflects their desire for alternatives to the traditional models of care that millennials are increasingly forgoing.

For that just-in-time healthcare generation, Oscar provides just-in-time telehealth care.

The resonant experience actually starts with the sign-up. Design and data make the insurance enrollment experience feel almost as intuitive and familiar as joining a new social media community.

Exploring the plan that’s right for you is as easy as telling Oscar about who you are. Each of the underlined areas lets you customize the field with your own information.

The plans let applicants use simple right and left arrows to determine how much they feel comfortable spending now (monthly payment) vs later (co-pays and other costs of treatment). The plans even include perfect-fit millennial discounts and rewards, like price breaks for being active and gym discounts to keep you going.

Each plan includes perks designed to make it easier for millennials to consume healthcare on their terms—like apps that help them find points of care and save money on services.

By focusing its business in New York City, Oscar caters to the 73% of millennials living in urban areas that worry about having necessary access to healthcare.

Making ends meet in a big city such as New York City is difficult enough. Add in hoping to find a job with health benefits that aren’t off the charts and trying to save a little cash, and you’re put in a stressful situation. Forty-four percent of millennials say that the cost of a healthy lifestyle is a barrier to them being as healthy as they can be.

Oscar Health may not be the only company that has encouraged younger adults to get insured, but they are certainly one of the front runners in the battle for millennials, a generation that is increasingly forgoing the standard options for health insurance. With a clear understanding of millennial attitudes and needs, Oscar seems to have a firm grasp on where millennials are and where they need to be.

Questions for your brand to consider:

Sure, the healthcare industry is complex, but millennials have become used to interfaces and experiences that hide complexity. How can your brand make its critical millennial-facing touchpoints more friendly and easier to use?

What new ways can your brand connect with the 40% of millennials who don’t have a primary doctor? Or, how can it connect through this fast-growing telehealth channel?

Do millennials living in urban areas need different kinds of support or services from your brand?
Millennial Maxim 2: We’ll pass on the sick care, thank you.

A majority of millennials (62%) see a healthcare professional reactively, when something goes wrong with their health. That’s significantly more than Gen Xers or baby boomers and it’s reflective of their perception that healthcare is really “sick care” —a system designed to restore their health, not maintain it.

To avoid the system, millennials are mashing up food trends with high-profile cleanses and intriguing new exercise programs to proactively live healthier lives—and keep the doctor away. They’re loyal to brands that let them combine life and health—preferably in their living rooms instead of in exam rooms.

Who’s helping them pass on sick care?

GREATIST

Greatist is a fact-checked health and wellness website that is on a mission to change the way the world views healthy living. Greatist has an expert network and a passionate community that promotes realistic health and wellness goals that encourage people to be the best they can be.

Are you looking for a new workout you can do in three simple moves? Or maybe a new lentil and feta tabbouleh recipe? What about some tips for staining your teeth, or even ideas for better dates?

Yeah, Greatist has all of that in the ultimate millennial-fueled blur of life and health.

Greatist has joined a mission with millennials, helping them take their health into their own hands. It inspires its visitors to do more of the everyday...
The majority of millennials (75%) think that how they live now will impact their future health.

And, they are investing time and money in keeping that doctor away:

- 49% have used a training program such as P90X, Insanity, or CrossFit in the past 2 years
- 42% are willing to pay more for foods that are made with all-natural ingredients
- 30% have talked to a nutritionist in the last two years

"Health profoundly needs brands that people trust," says Derek Flanzraich, founder and CEO of Greatist. His one and only goal: to build the best health content available.

The content is delivered in the quick-hit solutions that millennials demand and love. It’s syndicated and shared across the Web. But, most importantly, it’s optimized for mobile devices and social media, exactly where millennials spend time. As Flanzraich puts it, "we don’t want to be somewhat relevant to everyone; we want to be extremely relevant to someone.”

The team at Greatist understands a critical driver of millennial trust: they value authentic over perfect.

Greatist is about as far from Martha Stewart as a brand can get. There, you won’t see a perfect Christmas tree, a daughter adorably dressed for the first day of school, or a month-long calendar of diet-friendly recipes. Instead, you’ll find solutions that help millennials do a little bit better, ones that embrace their flaws while letting them win some small victories.

Greatist also fully understands the power that stress has on the millennial generation, a power that can overwhelm even the strongest individuals if not managed properly. Given this generation’s barriers to taking the best care of themselves (time and money), Greatist meets their needs with articles like “81 Awesome Resources When You Can’t Afford a Therapist.”

Greatist speaks to millennials with a voice and a context that doesn’t add pressure. Instead, it provides context to help lower stress. For example a post on Instagram says, “You can do anything, but you don’t have to be everything.” Through a thorough understanding that millennials aren’t perfect and don’t really have the desire to be, the connection they are able to create is seamless.

Preventative care for this generation is about working out, feeling good, and doing what they can to ensure future health.

Questions for your brand to consider:

01. How can we make your healthcare brand feel like a “healthy” choice – instead of a sick person’s choice?

02. Is your brand trying to deliver a health message that feels “too perfect?”

03. How can your brand be most relevant to a smaller population vs trying to be somewhat relevant to a broader one?

04. What other places or contexts should your brand be in to be part of that mash-up that millennials create between life and health?
The Walgreens company is the largest drug retailing chain in the United States. As of May 31, 2014, the company operated 8,217 stores in all 50 states, the District of Columbia, Puerto Rico, and the US Virgin Islands.

Their “at the corner of happy and healthy” promise is just what millennial adults want from big name brands and from life. But it’s not just advertising that shows off the brand’s deep understanding of millennial needs and attitudes. Walgreens has been a first-mover in developing experiences that blend happy and healthy and – increasingly – the design of their stores does, too.

What’s happy? Being able to engage businesses your way. Walgreens lets

**Who’s intertwining happy and healthy?**

**WALGREENS**
shoppers skip the lines – and the human interaction! – by picking up and paying for their prescriptions at express stations.

New rewards and payment programs add a little fun, too. The chain has been testing out all things Apple – from tap-to-pay at the register to clever iBeacons that alert shoppers to nearby deals and personal discounts. Their long-standing rewards program has recently evolved to reward shoppers for making healthy decisions outside the store, too. Now they can accumulate those points by showing results on popular wearable devices such as Fitbits, the Jawbone UP, and the Withings scale.

Rewards are important because they knock down the price of favorite products – right at the time in life when many people need that extra financial help most. Those discounts and perks may decrease the average order for Walgreens, but they know it’s an investment that will pay off. Their millennial-focused shopping experience is designed with the long view in mind. If Walgreen’s earns their preference now, it will likely be able to hold it through their prime healthcare buying years.

Over 400 of the brand’s flagship stores are taking happy-healthy to a new level. They’re called well-experience stores and they’re custom-fit for how millennials shop, live, and use healthcare.

The new stores include lots of fresh food offerings and upgraded pharmacies. Plus, they have healthcare that’s “grab and go,” too. Nurse practitioners can give flu shots, do health screenings, and help manage chronic conditions.

The urban stores are going even further – combining the experiences of millennial favorites like Target and Sephora into a smaller, faster footprint where customers can buy a smoothie, refill their prescription, pick a bottle of wine, and get a mini makeover on their lunch break.

Questions for your brand to consider:

01. If your brand were rebuilt by millennials today, what would it look like? How would the experience be different?

02. What new communication or service touchpoints would make your brand more usable and relevant to millennials?

03. Even if millennials aren’t the core audience for your brand, are there ways to begin building relationships with them now to earn their loyalty for the long term?

04. How does your brand help make millennials happy? What emotional chord does it strike?

Dollars are precious for millennials

Millennials spend $200 billion every year. But they aren’t exactly rich:

Median annual income:

Younger millennials: $25,000
Older millennials: $48,000

Questions for your brand to consider:

01. If your brand were rebuilt by millennials today, what would it look like? How would the experience be different?

02. What new communication or service touchpoints would make your brand more usable and relevant to millennials?

03. Even if millennials aren’t the core audience for your brand, are there ways to begin building relationships with them now to earn their loyalty for the long term?

04. How does your brand help make millennials happy? What emotional chord does it strike?

Dollars are precious for millennials

Millennials spend $200 billion every year. But they aren’t exactly rich:

Median annual income:

Younger millennials: $25,000
Older millennials: $48,000

Questions for your brand to consider:

01. If your brand were rebuilt by millennials today, what would it look like? How would the experience be different?

02. What new communication or service touchpoints would make your brand more usable and relevant to millennials?

03. Even if millennials aren’t the core audience for your brand, are there ways to begin building relationships with them now to earn their loyalty for the long term?

04. How does your brand help make millennials happy? What emotional chord does it strike?
Millennial Maxim 4: Do good with us.

Many have compared millennials to baby boomers, both being 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.

Seeing those values in brands can be hard for millennials. They assume that brands and big businesses have their own agendas, ones that aren’t aligned with their own desire to create a better world. They’re attracted to brands that share their service orientation and show their values in their actions.

Who’s doing good with millennials?

JOHNSON & JOHNSON

Johnson & Johnson is a US-based multinational medical devices, pharmaceutical, and consumer packaged goods manufacturer.

When a brand takes an action that’s good for the world, but not necessarily for its bottom line, it’s now called “The CVS Effect.” That retailer’s move to take cigarettes out of its stores may have won it the moniker, but millennial favorites like Apple, Chipotle, and Disney have been earning loyalty with “do the right thing” decisions for years. In healthcare, the brand known for doing good is Johnson & Johnson.
Caring has been at the heart of Johnson & Johnson for more than 125 years. So, it should come as no surprise that many of their initiatives center around making care more commonplace. One example is their Care Inspires Care campaign. It was triggered by the kind of insight most millennials would lament: studies showing that Americans overwhelmingly believe that the world has become a less caring place than it used to be. J&J wanted to know what impact that was having on people—especially children and moms. The answer then led to new action: programs that inspire others to engage in caring activities and celebrate selfless acts of care—big and small. So far, they’ve tracked 26 million acts of care and counting.

At the 2014 FIFA World Cup, J&J gathered thousands of millennials and others to join them in doing good. One of the programs, The Tour do Carinho (Caring Tour) traveled across Brazil to power one of the largest blood donation campaigns Brazil has ever seen. More than 20,000 bags of blood were collected—a total which could result in saving up to 80,000 lives.

J&J also brings that caring mission to millennial moms in lots of different media and programming. Babycenter—their big community site—is full of advice and support for new and expecting moms. There, users can find the advice of experts and share what they’ve learned. Nearly 60 percent of Babycenter’s audience is 18-34, according to comScore, putting it on a par with BuzzFeed and Vice for millennial reach.

Questions for your brand to consider:

1. Do you and your customers have a “shared purpose?” Are you communicating to your consumers on this level?
2. What do millennials care a lot about that your brand does, too? Are there natural affinities and connections we’re not acting on?
3. What could you do with your customers to earn their loyalty and create some shared impact together?
4. What would your “CVS effect” look like? How would it deliver double-bottom-line impact for our world and your brand?
Millennial Maxim 5: Be there when we need you – and don’t freak us out.

This is the generation that entered adulthood with WebMD, Dr. Oz, and PatientsLikeMe. They have all the world’s collected medical knowledge – and healthcare fears – at their fingertips. For them, self-diagnosis follows every sniffle and the choose-your-own-diagnosis style of most sites can quickly send them into a panic.

Millennials are attracted to healthcare brands that speak in human voices, are in all the places they are, and know how to empower – not panic – their customers.

Who’s being there?

UCB

UCB is a global biopharmaceutical company focusing on severe diseases, with operations in approximately 40 countries.

UCB knows that pharmaceutical companies are uniquely qualified to offer the kind of credible, trusted healthcare information millennials want with the context they need. Those brands just don’t always choose to do it with a voice and experience millennials can connect to.

So, UCB is reinventing the “pharma experience” for consumer healthcare.

One way they’re doing it is by being a real advocate – an Epilepsy Advocate, that is.

Sometimes Millennial Self-Diagnosers Get It Wrong

37% of millennials sometimes diagnose themselves with health problems that they don’t have (vs 26% of Gen Xers and 24% of baby boomers).
Trish Nettleship, UCB’s director of social media and influence, wanted to make smart use of social channels. So, her team started with listening. What they heard will sound familiar to anyone who works in or lives with epilepsy: a feeling of isolation. Their customers needed more resources and knowledge, yes. But, more than that, they needed to share with people like them and feel more connected.

The team dug into the numbers to determine where their customers were spending time. Facebook was the obvious destination (39% of their audience vs 22% for Twitter, the next closest social platform). Luckily, the brand had the perfect starting point: Epilepsy Advocate, a program designed to share the real stories of people with epilepsy and the friends and family who support them. Their opportunity: evolve the program from one-way storytelling to active social interaction.

Content marketing became a particularly powerful tool in that shift.

Listening revealed some of the most popular topics about epilepsy in social media: lifestyle, medication, and treatments. Community managers were able to use those broad categories to start sharing content in bite-sized chunks designed to educate without overwhelming.

Today almost 150,000 people follow the page. Sometimes the community managers share “Did you know?” facts and statistics, infographics and illustrations. Other times, they pose big community-building questions. Once the team gets a conversation going, they participate in it, answering questions and recognizing comments in real time.

Their goal is to give people the real support they need to feel in control of their healthcare and continually drip the kinds of content and context that might prompt important conversations with their doctors.

UCB isn’t stopping with social. This April, they launched a global effort to innovate the broader category of patient support. The event was called Hack Epilepsy, a two-city collaborative competition with a single purpose: improving the lives of people with epilepsy.

Four specific challenges, each inspired by the unmet needs in the epilepsy community, focused their work:

**Challenge 1** Connecting and Sharing
Empower people to talk about their epilepsy, share their anxieties and support others with epilepsy.

**Challenge 2** Seizure Guardian
Enable people with epilepsy to identify seizure triggers. Raise public awareness about how to respond to and cope with potential seizures.

**Challenge 3** ABC of epilepsy
Help challenge the misconceptions and lack of information around epilepsy and, through this, help reduce the confusion and disbelief that so often follow the diagnosis of epilepsy.

**Challenge 4** Co-pilot
Show people living with epilepsy how to navigate their way towards specialist care and reliable information. Show families and caregivers how to access emotional and tactical support.

Teams in Brussels and the US tackled the challenges with innovation and empathy. They worked to make the complex, simpler; the overwhelming, more doable.

---

**Questions for your brand to consider:**

01. **What real needs do people have in your category today that just aren’t being met?**

02. **Is the information your brand is providing reflective of the way people get information today? Is it delivering a story or value?**

03. **What sounds scary about this category, but really isn’t? How could you help to demystify what the experience will really be like?**

---

44% online health searching is a source of stress 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)
Sanofi is a global pharmaceutical company with more than 110,000 employees in 100 countries. It is a major player in the diabetes and oncology markets, among others.

Managing a chronic disease is always a work in progress. It's a project that has its ups and downs. Its resolutions and missteps – big and small. So, Sanofi has built both its consumer and healthcare professional support tools to be part of that entirely imperfect journey.

Who's bringing balance?

SANOFI

Sanofi is a global pharmaceutical company with more than 110,000 employees in 100 countries. It is a major player in the diabetes and oncology markets, among others.

Managing a chronic disease is always a work in progress. It's a project that has its ups and downs. Its resolutions and missteps – big and small. So, Sanofi has built both its consumer and healthcare professional support tools to be part of that entirely imperfect journey.

The dX: Diabetes Experience is Sanofi's online hub for diabetes conversation. The topics on its front page are all about content and context. There's advice for how to plan a wedding with diabetes onboard, a guide for figuring out a meal

Millennial Maxim 6: Help us find balance.

Millennials see health and wellness as something that goes beyond a visit to the doctor's office. They see it as an ongoing work in progress that should be just as manageable as any other aspect of their life. The role that stress plays on their health has made them a generation that understands the importance of balance. In fact, 88% of millennials say that in order to lead a healthy lifestyle it is important to achieve a work-life balance.

Brands that understand that managing life is managing health can connect with millennials in powerful new ways.
Living their best lives

Thousands of visitors a month spend time on the site to try and figure out how to live their best lives with diabetes and keep their health from holding them back.

plan on a camping trip, and tips for keeping stress from derailing your good intentions.

Thousands of visitors a month spend time on the site to try and figure out how to live their best lives with diabetes and keep their health from holding them back.

Sanofi is also thinking about the millennials who might find themselves in the position of supporting someone living with diabetes. Diabetes Co-Stars focuses on the critical role the encouragement of friends and family plays in helping someone successfully manage diabetes.

The Sanofi team created an original documentary to bring the impact to life. “Strength in Numbers” was produced by actress Elizabeth Perkins and her “co-star” and husband Julio Macat. It features her diabetes story as well as two other personal stories from the Diabetes Co-Stars casting call contest – best friends Amanda Bauer and Anne Casey from New York, and father-daughter duo Eugenio and Naomi Rivera from Texas.

If living with a health issue is an imperfect journey, treating one is, too. For professionals on the frontlines of care, Sanofi created the Connecting Nurses program. It’s brought together 14 million nurses from over 130 countries to help each other bridge the gaps in healthcare and resources that happen around the world. They’re looking for the next solution that when amplified, can give nurses the support they need to do the work they need to.

Sanofi’s Diabetes Experience doesn’t define people by their disease; rather, it connects with people who also have diabetes by providing valuable lifestyle information – recognizing the whole and helping them find the balance they are searching for.

Questions for your brand to consider:

01. Are there ways you can help your customers do just a little better every day? What about the people who support them?

02. What goals do your customers have for their lives that could be limited by their health?

03. How can we connect consumers or professionals to help each other solve their daily challenges?

04. Are we giving people the right kind of information and tools to really feel in control?
Whole Foods Market, Inc. is an American supermarket chain specializing in organic food. Whole Foods first opened on September 20, 1980. With stores in the US, Canada, and the UK, Whole Foods Market is headquartered in Austin, Texas.

Not a healthcare brand, right? Yeah, we know. But Whole Foods has been dubbed the luxury brand of millennials and its promise is entirely connected to health through active transparency.

Whole Foods lives that new luxury in its stores with an open, welcoming floor plan, highly designed displays, and—importantly—all the stories behind the labels.

In Whole Foods, customers learn about farmers in their community, artisans around the world, and entrepreneurs they never expected. They taste and try and explore things they never expected. And, their confidence and conviction is built by the sense of transparency.

Health is on the shelf, too. Whole Foods provides millennials with fresh, high-quality products in a way that makes them feel like they are not just grocery shopping, but making strategic health decisions. By framing their products in a way that feels like a long-term health decision and not a shopping cart decision, their prices are easily justified and even embraced—premium price for a premium product.

Whole Foods Market, Inc. is an American supermarket chain specializing in organic food. Whole Foods first opened on September 20, 1980. With stores in the US, Canada, and the UK, Whole Foods Market is headquartered in Austin, Texas.

Who’s showing their sources?

Whole Foods

Millennials are changing the definition of luxury—just like they’re changing the terms of healthcare. For them it’s less about extravagance and more about eco-friendly capitalism. Consider these shifts:

<table>
<thead>
<tr>
<th>Boomer luxury</th>
<th>Millennial luxury</th>
</tr>
</thead>
<tbody>
<tr>
<td>Affluent and like to show it</td>
<td>Affluent and tend to hide it</td>
</tr>
<tr>
<td>Designer labels</td>
<td>Unknown surprises</td>
</tr>
<tr>
<td>Exclusive</td>
<td>Welcoming</td>
</tr>
<tr>
<td>Anonymous</td>
<td>Personal</td>
</tr>
<tr>
<td>High quality</td>
<td>High design</td>
</tr>
</tbody>
</table>

Forty-two percent of millennials are willing to pay more for foods that are made with all-natural ingredients.

And a full 36% of millennials are willing to pay more for foods that are organic.

Millennial Maxim 7: Show your sources.

This generation has peeked behind the curtain. They know the difference between a great headline and great advice, the gap between a trustworthy expert and a self-crowned guru. They’re cautious and skeptical of people and brands that make big healthcare promises. In fact, only 22% of millennials trust celebrities when they are endorsing a food product while 84% trust information from people they know personally (e.g., friends and family).

They’re looking for more transparency from brands to better understand who and what they can trust.

MORE NATURAL = MORE MILLENNIAL VALUE

Health is on the shelf, too. Whole Foods provides millennials with fresh, high-quality products in a way that makes them feel like they are not just grocery shopping, but making strategic health decisions. By framing their products in a way that feels like a long-term health decision and not a shopping cart decision, their prices are easily justified and even embraced—premium price for a premium product.
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.

Additional Sources:

1 Nielsen SHP Consumers 2014 Study

2 Nielsen 2014 Research: Millennials Prefer Cities to Suburbs, Subways to Driveways

3 comScore: Next-Generation Strategies for Advertising to Millennials

4 Text4Baby Research and Evaluation
   https://www.text4baby.org/index.php/about/data-and-evaluation

5 Whole Foods: Core Mission and Values
   http://www.wholefoodsmarket.com/mission-values/core-values