

The New World of Healthcare: What Millennials Want

Lynn O'Connor Vos, CEO, greyhealth group



We Know Millennials are Change Makers



Countless reports have told us so. The hunger to understand them makes sense. After all, Millennials have officially surpassed Baby Boomers as the world's largest generation. Getting a handle on this generation's character is paramount for anyone who has Millennial consumers, employees, friends, and family.

By researching Millennials, we've learned a great deal. We know that as digital natives, they're the most socially networked generation, with more Facebook friends and selfies than any other. Growing up in a post-9/11 political reality, they're also more socially conscious than Generation Xers. Carrying unprecedented loads of student debt, and with a financial crisis hitting them in often quite formative years, they're cost-conscious—and suspicious of blindly taking financial advice. And with strong preferences for companies who give customers a quality experience, Millennials are more brand-loyal than any other generation.

Prior studies have ably demonstrated this is a generation with a much-



differentiated set of outlooks and habits—and they're eager to make change through dialogue with the companies to which they pledge their loyalty.

However, there hasn't been much research examining how Millennials' proclivity towards change-making and dialogue shows up in healthcare, an industry undergoing enormous volatility. In 2014, personal healthcare expenditures grew to \$3 trillion.

The importance of deeply understanding a quickly growing, soon-to-be-primary healthcare consumer group cannot be overstated.

Meanwhile, several forces are pushing the industry to become more customer-centric—including low adherence to prescriptions, the democratizing influence of technology, and public-policy incentives. The intersection of Millennial self-perception as change-making consumers with their healthcare preferences is increasingly important, as healthcare finally becomes customer-centric. It's no longer good enough to keep the consumer in mind. Today, the industry has to differentiate among consumers to truly reach them. And, as others have found, Millennials have unique outlooks, preferences, and habits.



“Young people need to be asked what matters, not told what matters.”¹

Jeff Martin, CEO and Founder, Tribal Brands Inc.,
Social Good Summit



As Millennials age, they are taking on more healthcare responsibilities for others, and bring their change-maker attitude into the exam room. They do so on behalf of themselves, as well as the other generations they will care for. The industry must catch up.

The importance of deeply understanding a quickly growing, soon-to-be-primary healthcare consumer group cannot be overstated. We set out to paint a specific picture, asking Millennials, and the experts who work with them, about their habits and preferences when it comes to healthcare. Together with Kantar Health, we analyzed

data from a survey that included 2,040 adults in the US, to compare Millennial adults' healthcare habits and attitudes to those of US adults in other generations. We also conducted several interviews with experts and Millennials to put those findings in context.

First, we confirmed Millennials' growing influence over their own health and the health of their loved ones. Indeed, our Millennial respondents confirmed they aren't all flighty 22-year-





olds worrying only about themselves and their next rent check. Not only are the eldest Millennials reaching their mid-30's, we find they're working hard and building families—for example, half are working full-time, and 40% are married or living with a partner.

When it comes to healthcare responsibilities, the numbers are equally compelling. Nearly a third (30%) of Millennials are parents, shaping the healthcare habits and outlooks of their children. More than half (52%) are what we call “Health Activators” for their families, controlling healthcare decisions on behalf of others, making them an

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important member of others' care—whether that be a spouse, parent, sibling, or friend.

Players in healthcare continue to cling to a time-tested model: a Primary Care Physician serves as a loyal advisor for patients, and a trusted intermediary for pharmaceutical companies and

insurers. Increasingly, Millennials reject that model, while seeking alternatives that simply do not exist. So, they're rolling up their sleeves, to make the change they wish to see: right now, a million flowers are blooming. Most of these alternatives are flawed, and none are dominant, presenting both enormous risk and opportunity for healthcare as a whole. Over the course of this paper, we'll define what Millennials wish to see, explore root causes, and make some recommendations for co-creating a new approach to health that will work for Millennials' preferences, while still protecting their health. •

Meet the Experts



Alison Birnbaum, MSW,
Psychotherapist

"Millennials were taught to be very empowered, more than any previous generation."

"My biggest reward comes when the support I give a family allows them to enjoy and be confident in their parenting. If they feel they've done their job well, I've done my job well."



Natasha Burgert, MD,
Pediatrician



Derek Flanzraich,
founder of Greatist

"If Millennials take things into their own hands, it's because they've seen the system hasn't been working—and it needs to work."

"Young people are both more knowledgeable and more open to understanding health and mental health."



Victor Schwartz, MD,
Psychiatrist

Millennials Seek Partners in Health





Imagine you are a pediatrician, and a young parent comes into your office with 2 thick reference books and a stack of online articles she has printed out to show you. “I’m trying to decide whether to vaccinate my daughter,” she says. “I’ve done a lot of reading, and found a lot of pros and cons. Before I make a decision, I wanted to ask you: what do you think?”

Pediatrician Natasha Burgert has these conversations frequently with parents in her practice. They can be extremely difficult to navigate. For many years, the pediatrician was the primary source of advice and expertise when it came to a child’s health. “Today, it’s pretty common for Millennial parents to view their providers as a secondary—important, but secondary—source,” she says.

Psychotherapist Alison Birnbaum, MSW agrees. “Before my patients come to see me, they do research and try to help themselves first,” she says. “They only come to see me when their techniques haven’t worked. They think of themselves as experts—which indeed they are—on what makes them happy

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Natasha Burgert, MD, Pediatrician

and what motivates them to change.”

Our survey validates Birnbaum and Burgert’s experiences. When Millennials fall ill, they are unlikely to rely on a doctor as their sole advisor. A minority of Millennials (41%), as opposed to a majority of respondents from other generations (68%), views a doctor as the best source of health information. Further, 45% of Millennials prefer to use an over-the-counter medication, rather than depend on a doctor to give them a

prescription, vs 34% of non-Millennials.

In an era when academic research and clinical trial data is easily accessible online, patients increasingly take a larger role in “owning” their health. Pharmaceutical commercials aid in this self-empowerment by encouraging viewers to request specific medicines



41%

68%

**“I don’t have
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physician.”**

Derek Flanzraich, Millennial and founder of Greatist

that could help with their medical issues. As doctors quickly assess the gaps in online research that patients conduct, it’s easy to dismiss patient research. By arguing, being curt, ignoring, or failing to show respect for patients’ independent efforts, providers risk losing their trust, or dissolving the patient relationship.

“I don’t have a primary care physician,” says Derek Flanzraich, a Millennial and founder of health website Greatist.com. Given the increase of specialists for different health concerns, like many Millennials (28% in our survey, vs 11% of non-Millennials), Flanzraich skips a long-term relationship with a general practitioner. He consults sites like Zocdoc to find specialists, or will use a telehealth app for more prosaic concerns. He does some of his own

research on health and fitness as well, although he highly recommends consulting a doctor for any chronic or acute medical concerns. “I know Millennials frequently turn to friends and Dr. Google when they’re sick, which I don’t recommend, but it happens all the time,” he says.

With Dr. Google at patients’ fingertips, our experts recommended across the board that healthcare companies and providers find ways to embrace a more informed patient/consumer. How can they do it?

Think back to that young mother, coming to Dr. Burgert full of independent





45%

34%

research about the pros and cons of vaccinating her child. “I had to step back and realize she wasn’t trying to be argumentative or difficult. She was concerned, and had tried to educate herself when making a healthcare decision,” Burgert recalls. “So I asked her more about the work she had done, evaluated where her knowledge gaps

were, and started to help her fill them—both with my own explanation, and by recommending better resources for her to consult on her own.” At the end of the process, Burgert’s patient got the vaccines she needed.

Entering into dialogue and treating Millennials as respected partners in health is the key to earning their trust

and influence their healthcare decisions. Yet a fascinating paradox makes solutions elusive: despite their sense of ownership, Millennials struggle with the confidence to commit to their decisions. •

Millennials Don't Trust Traditional Authorities





Millennial satisfaction with online resources

WebMD and Mayo Clinic

39%

29%

Blogs and message boards

30%

13%

Millennials
Non-Millennials

Derek Flanzraich grew up struggling to keep his weight under control, and found the resources at his disposal dubious at best, and dangerous at worst. “Every time I turned on a TV, I saw an ad about a ‘miracle pill’ that would help me lose the weight, or I’d open a *Men’s Health* magazine and see a 20-minute workout to get rock-hard abs,” Flanzraich recalls. “Even at that age, I knew they weren’t real. I was really angry that they were talking down to me, that they had no respect for my intelligence. And I had no faith in what they were selling me.”

While many Millennials feel better informed and more empowered to “own” their health, viewing experts as partners rather than vaunted authorities, some have trouble trusting those partners at all.

Our panel of experts shared that Millennials are increasingly skeptical of authority. They’ve lived through a



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Victor Schwartz, MD

financial crisis, when the most stable investment (home ownership) suddenly became tenuous; 9/11, when the US came under threat; and skyrocketing college debt, convince most Millennials that they are likely to live more modest

lives than their parents. Understandably, Millennials are anxious about the future, and frequently mistrust authority.

“In many cases, patients haven’t received good care. Their visits with healthcare providers have been rushed, and they feel unheard. They are more educated about health than ever before, so they have good reason to be reluctant to look at their providers as authorities,” says Victor Schwartz, MD. Combine that general outlook with lack of trust in healthcare, and assume that Millennials have trouble gaining confidence in any decision, whether informed by their own research or the advice of others.

The mental health experts say this lack of trust can enter into a vicious cycle of anxiety on the part of Millennials. “They are critical of the general media, so they search out other sources of information,” says Birnbaum. “They were raised to be empowered, they feel entitled to sit at the decision-making table and speak up, but they worry that they might not have the stuff.”

So they continue to research, seeking out friends, family, even public health figures like Dr. Oz and others. “They’re going everywhere,” says Flanzraich, and

our survey bears that out. Millennials are nearly twice as likely to be satisfied with the advice from these experts (29% vs 16% of non-Millennials). They’re also more likely to be satisfied with advice from online resources like WebMD and Mayo Clinic (39% of Millennials vs 29% of non-Millennials) and informal online resources like blogs and message boards (30% vs 13%). •

Decisions Elude Millennials





This unprecedented volume of—often conflicting—information and advice can be paralyzing. Millennials have become increasingly indecisive and under-confident in the decisions they make. Burgert reflects that even after she discusses options with her patients, and they come to a decision together, she finds they will call, text, or email to check back in and confirm it's the right approach. "It creates this really interesting paradox," says Burgert. "They have access to all of the information in the world, but they're incredibly insecure. They need a lot of reassurance that what they've done is OK. I see this far more from Millennial first-time parents than from older first-time parents."

She also gets some of her most bizarre questions from parents who see other parents posting enthusiastically on social media about their own theories of healthy living. "Maybe a friend posted about how she fed her child kale, and now the child is reading 2 years ahead of his grade level," Burgert says. "Of course, both are great, but there is no proof that



kale will cause advanced reading skills. Yet parents see that, become insecure, and come to me with questions."

With a system that's difficult to navigate and trust, and with the pressure of others boasting of various successful solutions online, it's no wonder Millennials often choose not to adhere to a given health regimen. More than a third of Millennials (34 percent, vs 17% of other generations) say they stop taking medicine entirely when they start

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Natasha Burgert, MD, Pediatrician



34%

17%

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Our experts told us their patients need a partner, not just to advise them, but also to provide shortcuts through the maze of bureaucracy in the system.

Schwartz recently received an email plea from a Millennial desperate for advice: a college freshman whose roommate had a difficult mix of challenges. This roommate was transitioning from male to female, was on the autism spectrum, and was battling suicidal thoughts. After weeks of struggling to determine how best

to help his troubled roommate, this college freshman found Schwartz through a friend of Schwartz's sister-in-law. Schwartz helped connect him to resources at his school to get counseling for himself and his roommate.

Many lack the resources this college freshman corralled to find a trusted partner to help navigate the system and search for the right approach. Left without confidence in the system or its professionals, they question the advice they get—and the remedies they try. This is yet another reason that Millennials look for alternatives beyond the primary

healthcare provider; they are looking for new remedies, ones that come from people they trust, and that meet their broader definition of health and wellness. •

Millennials Have a Broader Definition of Health





Raised in an era that prioritized physical fitness and balanced diets, Millennials are more aware than previous generations of the link between health and wellness—and they have a much broader view of health. A recent study found that 86% of Millennials would rather be healthy than wealthy, and in our survey, we dug into what “health” really means to this generation. When we asked Millennial respondents to choose from a list of potential elements in a robust definition of health, the 2 most-commonly chosen answer options were “physically fit” and “happy.” Non-Millennials most often chose “free from illness” and “physically fit.” This new injection of mental health—more frequently than being “free from illness”—demonstrates the holistic outlook of the Millennial generation. They are looking to be physically and mentally healthy, rather than to simply avoid an acute illness. Interestingly, Millennials—who are the generation most concerned with appearance as they age—are the generation most likely to

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Derek Flanzraich, Millennial, founder of Greatist

consider medical intervention to improve their appearance.

Schwartz has noticed this broader outlook among Millennials. “High schools and colleges have, in the last decade, begun to develop much broader health education curricula. They used to focus just on sexual health and substance abuse. Now, there’s a lot more effort to discuss mental health, stress, anxiety, sleep, nutrition, and exercise,” says Schwartz, who works with colleges to update their education on these topics. “So young people are much more on the ball. They expect this broader view of health, with mental health a big part of the equation. And things like anxiety and depression are much less stigmatized.”

Birnbaum and Burgert both agreed that their Millennial patients are eager to discuss and hear recommendations that

build healthy habits, and that promote ongoing wellness, rather than focusing just on an acute issue.

“Part of the reason I founded Greatist.com was that I felt a profound shift away from health and sickness being the point, to being a part of living a long life. That shift was really poorly spoken to by other sources,” says Flanzraich. His site takes a holistic approach to its target audience—Millennials interested in healthy lifestyles. If a reader comes to the site with the goal of losing weight, Flanzraich wants them to have weight loss be a byproduct of healthy habits.

“By focusing on holistic solutions, we’re able to guide people to a given outcome in a much more sustainable way,” he says. •

Millennials Seek Community

A photograph of three young adults, two women and one man, sitting together and looking at a smartphone. The woman on the left has curly hair and glasses. The man in the middle has a beard. The woman on the right has long hair. They are all smiling and appear to be engaged in a shared activity. The image is overlaid with a semi-transparent pink filter.



The holistic approach can tap into another impulse Flanzraich has identified among Millennials: an attraction to community. As young people increasingly move away from religion and civic engagement, they seek out other ways to connect. “Millennials are actively in search of their church. They haven’t found it online—too often, online communities engender feelings of jealousy and disconnection, rather than authentic connection,” Flanzraich says. So, in order to find community, he finds, “Millennials are using health and fitness as their religion, as an excuse to be part of a community.”

CrossFit, Daybreaker, and Wanderlust all bill themselves as more than just a way to lose weight—they bring people together around a lifestyle and community of likeminded members. “The community that spontaneously arises when people do these workouts together is a key component of why CrossFit is so effective,” reads the CrossFit website, before explaining the roots of the approach in police



and military workouts (2 professions known to create deep bonds between colleagues). “Daybreaker is a community. A dance party. A movement.” reads a headline on the Daybreaker website, beneath a picture of a large group of people with their arms linked. Another block of text explains that the morning dance parties are “cultivating a community that values wellness, camaraderie, self-expression, mindfulness...and mischief.” Wanderlust,

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Derek Flanzraich, Millennial, founder of Greatist





a yoga festival that grew into a network of studios, opens its site with the photo of a compost heap (not a yoga workout), and offers a network of mentors and spiritual leaders, signaling its community's holistic approach.

These signals of human connection

first, fitness second, support Flanzraich's idea that Millennials are looking to change health in another way: to view it as the core organizing principle around which to build 21st-century communities. This hunger represents an opportunity for the healthcare industry: to begin

to build intentional communities (or connect with fitness communities that already exist) around healthy living. The communities span online and in-person opportunities to connect with others and build a healthy, balanced life. ●

Communication is the Cure

In general, a shift from healthcare companies and providers to a “trusted partner/colleague” with a menu of solutions tailored to their particular preferences and outlooks as a patient, and away from a “venerated expert” with all of the answers, is the change Millennials are looking to see in healthcare.

The stakes are high. Established healthcare companies and brands could lose their consumer base to new entrants that better understand what Millennials are looking for. At worst, Millennials’ health, and that of their loved ones, will suffer if they take a bet on new start-up entrants like Theranos, or other companies that exhibit great communications and convenience

without rigorous practices to protect patient health.

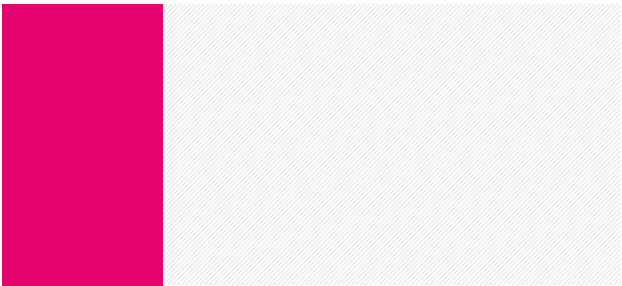
In order to give specific recommendations for a new mode of communicating with Millennials, we dug into the behaviors that create trust with patients, and examined whether Millennials feel that their healthcare providers are exhibiting those behaviors. After testing dozens of behaviors in our survey, we identified the behaviors that make the biggest difference in creating trust

through open channels of communication with patients. Then, we analyzed whether patients of different generations think that their doctors exhibit them. We did the same for pharmacists, health insurance companies, and pharmaceutical companies.



By the numbers

Health insurance companies
make preventative care affordable



26%



42%

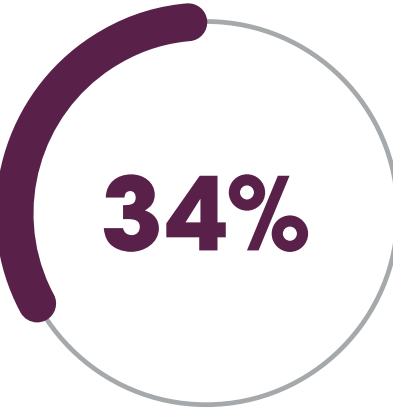
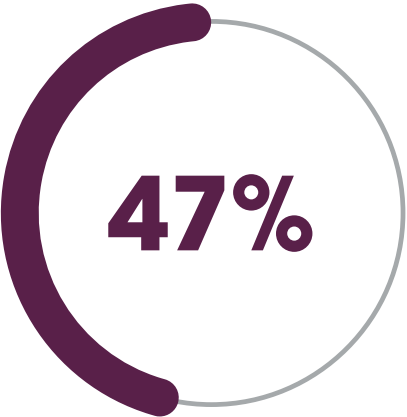
Doctors/Pharmacists provide me with the
information I need to make decisions



Doctors



Pharmacists



Doctors...

Report test results in
an understandable way

23%
56%

Proactively manage
my health

19%
46%

Health insurance companies...

Provide coverage
for doctors I trust

26%
46%

Make it easy to find a
doctor in-network

26%
38%

Pharmaceutical companies...

Provide me clear information along
with my prescription to help me
understand risks and side effects

13%
21%

Makes its clinical trial
data available online

8%
4%



Healthcare Communications Toolkit

Millennials were least likely to report seeing these behaviors of any generation—except when it came to pharmaceutical companies, where they were roughly on par with others, perhaps because of their brand loyalty.

These behaviors can serve as underlying principles to guide interactions with Millennials. Our panel of experts also had very specific, tactical advice for becoming that trusted partner in health for Millennials—thereby creating the change Millennials want to see in the industry.



Speak in a relatable voice

On his website, Flanzraich insists writers and editors use a consistent voice: that of a “friend who is a little further along than you are. It’s authentic, real, friendly, open-minded, and fun.” It’s not “expert advice.” By using the voice of a peer, Flanzraich says, his content can more easily cut through the skepticism that Millennials have to build trust.



Understand where they’re coming from

Every time a patient enters her office, Birnbaum asks, “What have you tried so far to help solve this?” She finds that they’ve all developed independent strategies, often based on Internet research, and taken a trial-and-error approach before coming to see her. “Asking that question levels the playing field,” Birnbaum says. Suddenly, we’re speaking as collaborators. They have ownership of their health and I am able to speak to gaps in their understanding because I know what has or has not worked.”



Assign homework

Burgert gives her patients reading assignments both proactively and reactively. She has a list of online resources that she gives parents as “pre-reads” for their 4-month visit, 6-month visit, etc. “They always do their homework,” she says. She starts the conversation by asking a few questions about what they read, to gauge how well they understood the content and what questions they may still have. “I evaluate where they are, whether they actually did the homework, and fill in any gaps from there.” By sending parents to reliable sites online, she cuts down on the unreliable information they may pick up along the way.



Provide tools

Birnbaum refers to her Millennial patients as being “on roller skates. They want to get help and go back out into the world with the skills, abilities, and tools to survive on their own.” So, she recommends apps, podcasts, reading material, all kinds of resources for them to draw from when they need help and aren’t ready to go back to her. “They do much of it, much of what I recommend,” she remarks.



Be available

With technology, Millennials are accustomed to quick responses. “Sometimes, that comes across as annoying entitlement or disrespect. But now, I recognize that the world is changing, and I just need to catch up,” says Birnbaum.



Meet them where they are

Both Burgert and Birnbaum emphasized the importance of understanding which communication channels work best for their patients. “I text with pretty much everyone now,” says Birnbaum. For Burgert, it varies. “I ask, how will I be able to find you? Email, text, phone, social media?” Burgert says. Understanding how best to communicate with parents has cut down greatly on the amount of time she spends playing phone tag, or awaiting a response to an email.



Set a contract with clear expectations

Burgert recalls the time she missed a phone call from a family after hours because she was on another call. Twenty minutes later, she wrapped up the first call and was ready to move onto the second. “By that time, the second family was already in the emergency room getting their child evaluated for pretty low-level symptoms, because I hadn’t gotten back to them fast enough. It was a waste of money and time on a non-essential visit,” Burgert recalls.

To head off that kind of escalation, she sets expectations with each new parent in her practice. “I tell them I will be communicating with them in a few ways,” she says. Then, she walks through each mode of communication: her blog and social-media channels, for general information; her office, for a more routine appointment or question; her email or cell, for an urgent concern. “By setting those expectations clearly, I find that families are more judicious in their approach.” She also asks what parents want from her—sick visits? well visits? information? help with discipline? Then, Burgert responds to let them know what help she is (or is not) comfortable providing.



Help them navigate the system

Many times, especially if they are in college, Millennials are left unsure about how to get care as they transition from decisions being made on their behalf to needing to shepherd their own care. If they are going through a mental health crisis, that illness may inhibit their ability to navigate. Furthermore, online information may fail to help individuals determine the level of severity at which they are experiencing a physical or mental health challenge. “Providers need to be very clear with patients about what’s acute, what’s chronic, and what’s episodic, and the resources and help they need in each of those situations,” Schwartz points out.

Rather than view Millennials' radically different approach to health as a crisis, healthcare industry leaders can see enormous competitive opportunity in being among the first to truly communicate with this generation.

Studying—and embodying—those behaviors and tactics that will drive trust and satisfaction with Millennials, healthcare professionals can begin to communicate with them better. By opening up a dialogue, demonstrating respect for their opinions and research,

and mobilizing Millennials' desire to make change within the healthcare system, companies and providers will earn this generation's loyalty for the long term, and work with them to create the healthy outcomes that we all wish to see. •

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Kantar Health deeply understands the influence of patients, payers, and physicians, especially as they relate to the performance and payment of medicines and the delivery of healthcare services. Its 600+ healthcare industry specialists work across the product lifecycle, from preclinical development to launch, acting as catalysts to successful decision-making in life sciences and helping clients prioritize their product development and portfolio activities, differentiate their brands, and drive product success post-launch. Kantar Health is part of Kantar, the data investment management division of WPP. For more information, please visit www.kantarhealth.com.

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