Population Health NEWS

Psychographic Segmentation: Innovation in Patient Engagement

by Brent Walker

I n the inaugural issue of *Population Health News* (March 2014), members of the publication's Advisory Board were asked to define "population health." Thomas Graf, chief medical officer, population health and longitudinal care service lines for Geisinger Health System, offered a succinct answer:

"Population health is the ability to define and understand the health status of every individual patient and proactively deploy medical resources to support those patients, whether it is to push resources to them where they are, or effectively connect them to the optimal resource in a patient-specific manner, accelerated by technology."

Understanding the health status of individual patients is more practical with electronic medical/health records (EMRs/EHRs), which can track the ways patients are utilizing the healthcare system. However, while these records might help identify *what* patients are doing within the system, they cannot determine *why* patients behave the way they do.

Highly interactive approaches, such as motivational interviewing, help clinicians discover individual patients' motivations and barriers to behavior change. These techniques recognize that a one-size-fits-all approach doesn't work because each patient is a unique individual with different priorities and aspirations. Such methods could be very effective, but are resource intensive. Implementation across a broad patient population might be inefficient and better reserved for a subset of patients who need extra investment in care.

To determine the motivations and keys to behavior change for consumers across a broad population, healthcare organizations could take a page from the playbook of leading consumer products companies and retailers and use psychographic segmentation to categorize patients according to shared motivations.

Segmenting Consumers by Motivation

Psychographics pertain to a person's attitudes, values, personalities and lifestyles, and are a key to activating behaviors. Two people could exhibit similar behaviors in a certain situation, but their motivations might be different.

Segmenting a population according to psychographics allows one to appeal to different people's motivations with personalized messages that resonate deeply. Psychographic segmentation represents an effective compromise between specific individual understanding and efficiently addressing the needs of a broad population.

Many healthcare organizations already segment patients according to various criteria, such as health conditions, age and gender. While these segments are united by physical similarities and often have common needs, the individuals within each segment do not think and act alike. Patients' priorities and behaviors might change with a diagnosis, but their personalities generally do not change. They are still the product of their experiences and upbringing, not a "walking health condition." Healthcare providers must take this into account.

Again, this is nothing new to successful consumer products companies, which have been using psychographic segmentation for years to develop effective product offerings, promotions and advertising based on a deep understanding of consumers.

A company such as Procter & Gamble uses psychographic segmentation to help define a brand's *prime prospects*, a limited set of consumers from among all possible purchasers of a product or service who are most likely, based on attitudes, needs and behaviors, to disproportionately purchase that product or service. This limited set might only comprise 15% to 20% of all possible consumers across industries, according to the Pareto Principle, but will drive a disproportionate amount of business.

 A multi-billion dollar brand would design its advertising campaign to appeal specifically to a prime prospect segment and let all other consumers draft behind in a halo effect.

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Healthcare providers obviously differ from consumer companies in several ways. First, a healthcare professional or organization must provide care for all patients, not focus on a particularly profitable type of patient. Secondly, running a healthcare practice is not like marketing a detergent or toothpaste, and marketing techniques are no replacement for the practice of medicine. However, psychographic segmentation can augment or supplement patient engagement. It also can help a healthcare organization's own marketing and outreach efforts, attracting new patients and keeping current patients loyal. This becomes important in a market increasingly driven by consumerism and where reimbursement hinges on patient satisfaction and outcomes driven by patient behavior change.

Creating the Consumer Model in Healthcare

Psychographic segmentation involves developing a survey with dozens of attitudinal questions to assess consumers' beliefs about a given subject (in this case healthcare), and having a large enough respondent sample to allow for a representative population and statistical differences among segments. A factor analysis using statistical clustering procedures identifies response patterns among attitudinal survey questions to determine which themes exist among a population. Respondents with similar answers to survey questions fall into distinct psychographic segments. Statistical analysis uses a limited set of questions—generally five to 15—whose answers are most predictive of a consumer segment.

An example of using a factor analysis model illustrates segments of healthcare consumers and the percentage each segment represents among the general population:

- **Self Achievers (24%).** The most proactive and wellness-oriented group, self achievers are ready to be in the driver's seat but appreciate directive guidance. Goal and task oriented, they appreciate measures to gauge progress in their efforts. They are the most willing to spend whatever it takes to be healthy.

- **Balance Seekers (18%).** Balance seekers are also proactive and wellness oriented, but they downplay the role of healthcare professionals. They prefer options and suggestive approaches and are open to alternative medicine rather than being given an already mapped out route to wellness and directive healthcare.

- **Priority Jugglers (18%).** Priority jugglers tend to be less proactive and engaged with their healthcare because they put other responsibilities ahead of personal health; however, they are proactive in managing their family's health. They may require a higher level of interaction to keep them focused on their own healthy behaviors.

- **Willful Endurers (27%).** Willful endurers are independent and the least proactive about their health. They live in the moment and do not focus on long-term benefits or consequences. The challenge is to find ways to motivate them toward adopting healthy behaviors through immediate gratification.

- **Direction Takers (13%).** Direction takers prefer to be told by healthcare professionals what they need to do; clinicians are the experts in their eyes. They like to cut to the chase and do not like to be asked a lot of questions. This segment reflects the way healthcare has been delivered traditionally; unfortunately, this model only resonates with 13% of the population.

Each psychographic segment is unique in its motivations and communication preferences. Optimizing patient engagement—whether it is a one-on-one relationship between clinicians and patients or through non-personal channels, such as digital, print or television—involves segment-specific messaging.

To build on insights gleaned through psychographic segmentation, a healthcare organization has an advantage over a consumer products company by having a direct, in-person interaction with patients. Healthcare professionals can leverage psychographic insights in patient engagement to more quickly understand patient motivations and barriers to behavior change and to position recommendations more persuasively.

For example, TriHealth, a large health system in Cincinnati, is using psychographic segmentation with its health coaches to help patients with diabetes and musculoskeletal conditions achieve their care goals.[1] Patients answer a short survey, and an algorithm classifies them by psychographic segment that is noted in the patient file. By building stronger connections with patients, coaches are significantly reducing the time it takes to deliver meaningful advice.

Although psychographic segmentation is conducive to face-to-face contact with patients, it might not be feasible in some organizations because it necessitates training a sufficient number of physicians, nurses, coaches and other healthcare professionals to consistently leverage insights into their patients. Digital media, such as websites/portals, apps, email and mobile, allow interactions with individual consumers across a broad population, thus, enabling scaling of the approach.

Psychographic segmentation could be a useful tool for improving patient engagement across a population—classifying patients according to attitudes and motivations, providing insights for the efficient deployment of medical resources to support patients and activating positive health behaviors. It could supplement medical practice and strengthen a health system's education and marketing efforts. Psychographic segmentation represents an opportunity to take behavior influence "secrets" of the consumer industry and apply them to population health.

[1] Hostetter M, Klein S. "In Focus: Segmenting Populations to Tailor Services, Improve Care." Quality Matters. The Commonwealth Fund. June 2015.

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