THE COMPASS

COVID-19 Shifted the National Psychographic Distribution

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Key Takeaways

- **Understanding consumer psychology is an important and often underappreciated aspect of patient loyalty, but it is increasingly important in a market with abundant – and inexpensive – new care options, from major retailers to telehealth. Psychographics – the individual attitudes, values and personalities of consumers – can explain *why* individuals make certain healthcare decisions.**
- **No single psychographic profile dominates the American population, but Willful Endurers and Self Achievers represent sizable segments.**
- **There has been a notable shift from Priority Jugglers to Willful Endurers, potentially driven by the impacts of the COVID-19 pandemic, including a crisis of confidence in the healthcare system, worsening patient acuity and rising healthcare costs.**
- ***Compass+ Exclusive: How Can Stakeholders Use Psychographic Data to Inform Strategy?***

In one of the earliest editions of *The Compass*, we explained that "**healthcare providers that understand the psychology underlying the consumer's decision-making process will be better positioned to earn the loyalty of healthcare consumers with abundant choices.**"[1] With more large retailers like Amazon and Walmart, each with large and loyal customer bases, now providing low-acuity healthcare services in a “closed-loop” system with a wide variety of care settings, every health economy stakeholder should prioritize understanding consumer psychology about in order to remain competitive.[2] Unlike demographics (e.g., age, gender, income) and patient medical history, which can be useful in understanding ***what*** healthcare consumers do, psychographics (i.e., the individual attitudes, values and personalities that motivate healthcare decisions) can help explain ***why*** healthcare consumers make certain choices. Psychographic segmentation – grouping consumers based on their shared attitudes, values, behavior patterns, etc. – allows health economy stakeholders to understand healthcare consumer motivations and thus anticipate future demand for services, increase patient retention and maintain loyalty. The rapid evolution of many aspects of the U.S. healthcare system that were catalyzed by the COVID-19 pandemic prompted us to examine how and why the national psychographic distribution has evolved.

Background

Psychographics transcend demographics, meaning consumers of all ages, ethnicities, pay types (e.g., commercial, Medicaid, Medicare), income levels and geography are represented within each psychographic profile. Healthcare consumers can be segmented into one of five psychographic profiles – Willful Endurers, Direction Takers, Priority Jugglers, Balance Seekers and Self Achievers – based on their view of and approach to personal health, wellness and the structural aspects of care delivery (Figure 1). For example, Willful Endurers characteristically live in the “here and now” and tend to seek care from providers only when absolutely necessary. In contrast, Self Achievers are characterized by their proactivity in seeking healthcare services and medical advice. Reflecting some aspects of both Willful Endurers and Self Achievers, Priority Jugglers are highly proactive when it comes to the health of their family and loved ones but invest less time in their own health status.

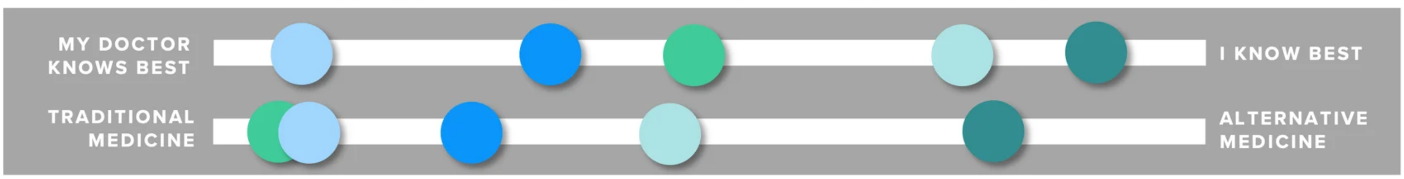
FIGURE 1. CHARACTERISTICS OF PSYCHOGRAPHIC PROFILES

MORE PRICE SENSITIVE ← → LESS PRICE SENSITIVE

MORE REACTIVE ← → MORE PROACTIVE

	WILLFUL ENDURER	SELF ACHIEVER	BALANCE SEEKER	DIRECTION TAKER	PRIORITY JUGGLER
CHARACTERISTICS	• Live in the "here and now" and believe there are more important things to focus on than improving their health • Not necessarily unhealthy, but do what they like, when they like, and typically do not change their habits • Self-reliant	• The most proactive when it come to their wellness • They invest what is necessary toward their health and appearance • They may have health issues, but they stay on top of them with regular medical checkups, health screenings and research • Task-oriented and will tackle a challenge if they are given measurable goals	• Generally proactive in their health and are wellness oriented • Open to many ideas, sources of information and treatment options • Physicians and healthcare professionals are viewed as useful resources, but not the only resource for leading a healthy life • They define what success looks like in their health	• Believe their physician is the most credible resource • Look to physicians and healthcare professionals for guidance, but may not always follow advice if it doesn't fit into their routine • Prefer to "cut to the chase" and do not like being asked many questions	• Very busy with many responsibilities and may not take the time to invest in their own wellbeing • More reactive with their own health issues, but very proactive when it comes to their family's health
PREFERRED SITES OF CARE	Urgent care, retail clinics, emergency department	Telehealth, traditional primary care	Traditional primary care	Traditional primary care	Traditional primary care

SEGMENTATION INSIGHTS DRIVE SPECIFIC MESSAGINGS



Source: Trilliant Health national consumer database. • PNG

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When using psychographic segmentation to understand healthcare decision making, it is important to consider that:

1. Consumers do not always fit neatly into a single profile and can possess attributes of all five psychographic profiles, but generally have a dominant profile with secondary and tertiary profiles. For example, a person may primarily align with the Balance Seeker profile, but when faced with exogenous factors like a stressful professional or personal development, display attributes of Priority Jugglers.
2. An individual's psychographic profile is fully formed by age 18, with that mindset persisting in their consumer behaviors throughout their life – with a few rare exceptions for specific diagnoses like cancer.

Because a consumer's psychographic profile is both complex and yet highly persistent, changes in the national psychographic distribution provides valuable information for stakeholders hoping to understand shifts in healthcare behavior and the implications of a national distribution shift.

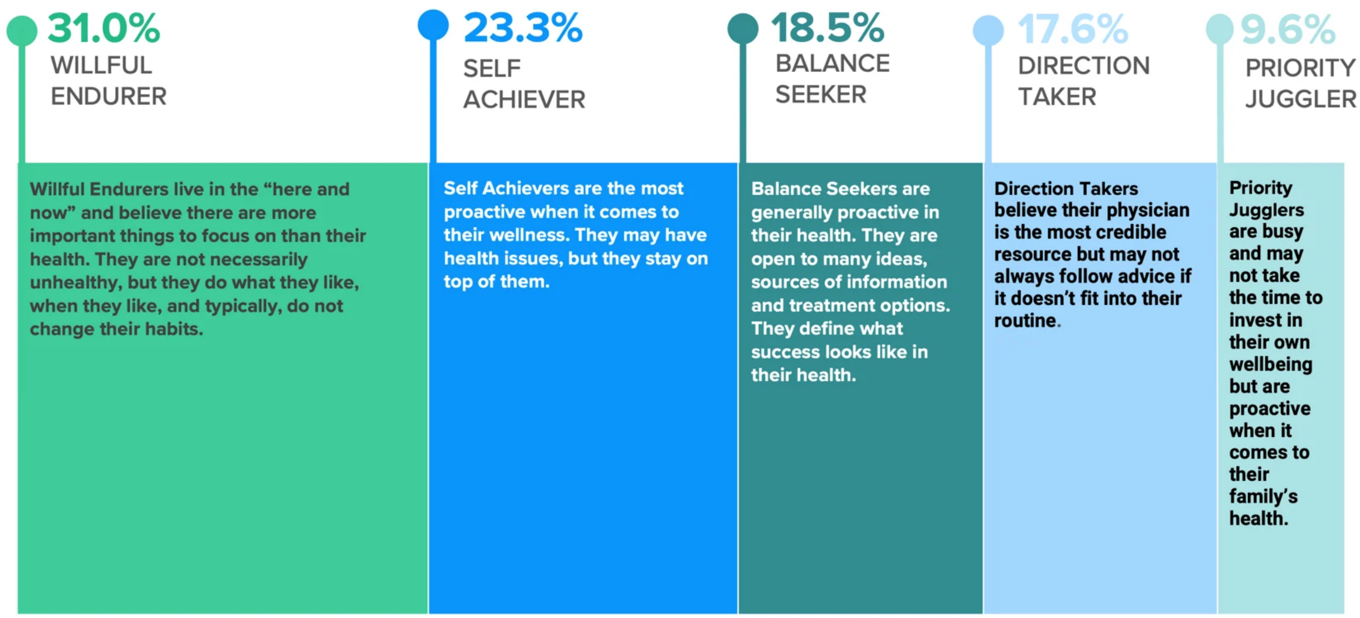
Analytic Approach

Leveraging our national consumer database, we analyzed the 2023 national psychographic distribution. We then compared the current psychographic distribution with the distributions from the past four years to capture how the distribution has evolved and varies by geography.

Findings

While no single psychographic profile dominates the American population, the dominant profiles are Willful Endurers and Self Achievers (Figure 2). Willful Endurers and Self Achievers comprise 31.0% and 23.3% of American consumers, respectively, followed by Balance Seekers (18.5%), Direction Takers (17.6%) and Priority Jugglers (9.6%). In recent years, the national psychographic distribution has shifted, with Willful Endurers consistently representing the largest share of Americans, but increasing in share from 2021 to 2023.[3] Notably, the proportion of Priority Jugglers shrank the most from 2021 to 2023. Typically, the secondary profile for Priority Juggler is Willful Endurer, suggesting that a small yet meaningful percentage of Priority Jugglers are more influenced by their secondary profile.

FIGURE 2. NATIONAL DISTRIBUTION OF HEALTHCARE CONSUMERS BY PSYCHOGRAPHIC PROFILE, 2023



Source: Trilliant Health national consumer database. • PNG

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The shift of more Americans from Priority Juggler to Willful Endurer since the COVID-19 pandemic has been influenced by several factors, reflected in declining confidence in the American healthcare system amidst worsening patient acuity and rising patient deductibles and co-pays.

While Americans' trust in the U.S. healthcare system has been declining for years, the response to the COVID-19 pandemic (e.g., conflicting guidance from national institutions, untested treatments reported in research publications, concerns about political interference in public health) led to a significant decline in consumer confidence from 2020 to 2021, particularly in physicians and hospitals.[4,5] The factors that underlie an individual's trust in the healthcare system – and thus their response to declining trust – are unique and complex. However, it is possible that Priority Jugglers were more likely to question the necessity of seeking healthcare services as they lost trust in the system, given their lack of proactivity. To what extent did exogenous factors lead Priority Jugglers to become more inclined to adopt a reactive approach like Willful Endurers?

An increasingly unhealthy American public may also have influenced the shift of some Priority Jugglers to Willful Endurers. The COVID-19 pandemic, both directly through its nature as a contagious disease, and indirectly through its negative impact on healthcare utilization (in particular primary and preventive care), precipitated a downward spiral in the physical and mental health status of Americans.[6,7] Between 2019 and 2022, primary care volumes decreased by 8.4%, while cancer mortality and early-onset cancers for younger Americans increased.[8] Changes in the health status of Americans, particularly if the population became generally sicker, could have influenced Priority Jugglers to shift towards the more reactive approach of Willful Endurers. Did Priority Jugglers become discouraged by the overwhelmed healthcare system and opt for a more reserved approach to seeking care?

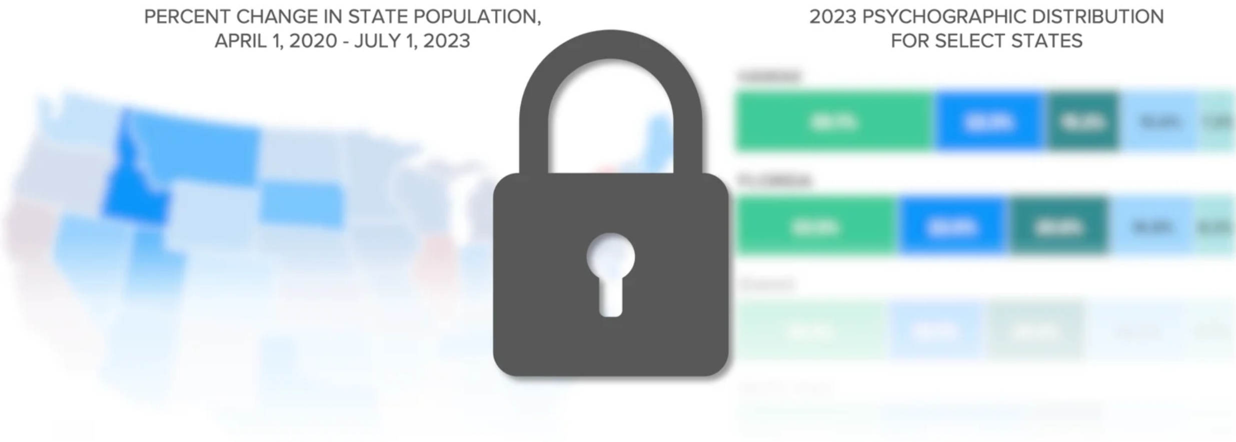
Rising costs are another factor that must be considered in examining the evolution of the national psychographic distribution. Since 2010, family and individual deductibles have increased by 31.4% and 33.4%, meaning that each year, Americans are spending more and more on healthcare.[9] We know that rising costs have impacted all Americans, becoming the primary driver of forgone care and skipped medication doses.[10,11] However, rising costs may have disproportionately impacted Priority Jugglers, prompting them to reassess their proactive healthcare behaviors. Have rising costs made it more challenging for Priority Jugglers to afford the proactive healthcare practices they were accustomed to?

Simultaneously, large retailers such as Amazon and Walmart have entered healthcare to provide Americans with lower-cost, more-convenient access to select healthcare services. In theory, the predominance of Willful Endurers should work in the favor of retail providers – particularly given their preference toward urgent care settings – but the data suggest otherwise. Is it possible that Willful Endurers, in addition to other profiles, perceive the quality of care among retail providers to be different from – or worse than – other settings of care? Similarly, while Self Achievers are favorably inclined towards telehealth, telehealth utilization has declined consistently since the height of the pandemic.

Compass+ Exclusive: How Can Stakeholders Use Psychographic Data to Inform Strategy?

(Figure 3).

FIGURE 3. PROFESSIONAL RATE (CPT 99281-99285) DIFFERENTIAL SPENDING, UNITEDHEALTHCARE AND FLORIDA BLUE AT A SELECT FLORIDA FACILITY, 2022

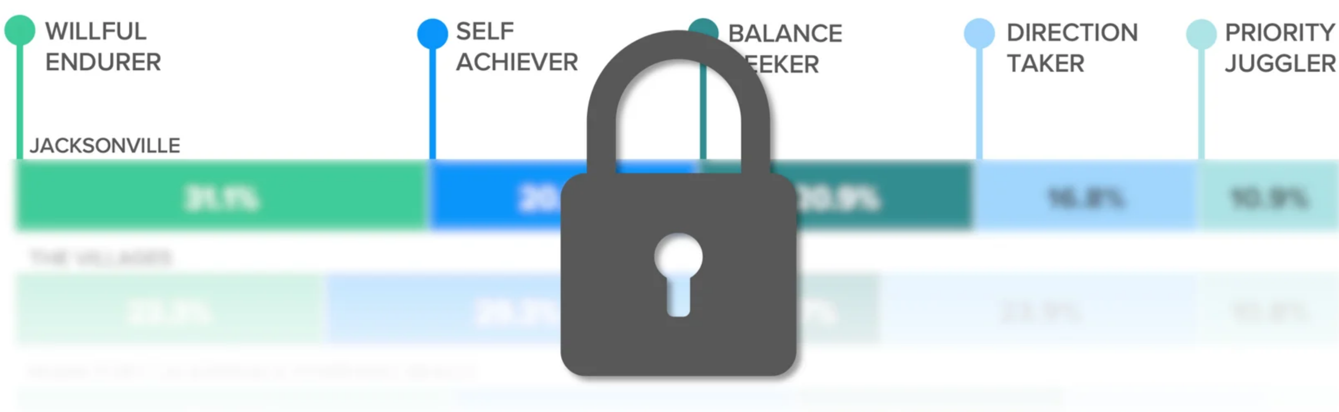


(Figure 4).

FIGURE 4. RANGE OF STATE PSYCHOGRAPHIC DISTRIBUTIONS, 2023

(Figure 5).

FIGURE 5. DISTRIBUTION OF HEALTHCARE CONSUMERS IN SELECT FLORIDA CBSAs BY PSYCHOGRAPHIC PROFILE, 2023



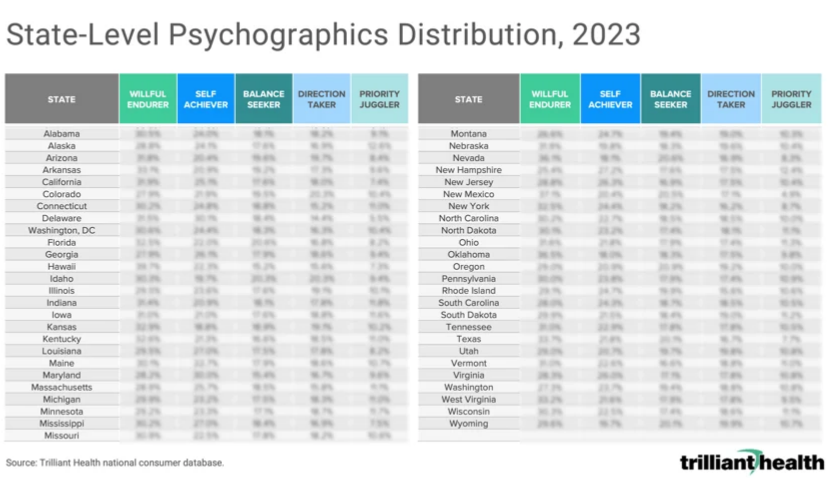
Compass+ subscribers can access a 50-state breakdown to elevate their understanding of national psychographic variation.

Access here.

In contrast to a few temporary shifts due to forced adoption (i.e., increased telehealth volumes, increased primary care utilization by women aged 20-49), the impact of COVID-19 on healthcare demand is seemingly more permanent.[12,13,14,15] As the health economy undergoes significant transformation, understanding consumer psychology in the context of healthcare decision-making is essential for providers looking to grow market share in an era of increasingly convenient and lower-price alternatives. Stakeholders on the supply side of the health economy must dynamically measure these changes and develop targeted strategies to influence decision making.

Thanks to Sarah Millender and Austin Miller for their research support.

Premium Consumer Strategy Compass+ Resources



State-Level Psychographics Distribution, 2023

STATE	WILLFUL ENDURER	SELF ACHIEVER	BALANCE SEEKER	DIRECTION TAKER	PRIORITY JUGGLER
Alabama	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Alaska	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Arizona	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Arkansas	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
California	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Colorado	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Connecticut	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Delaware	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Washington, DC	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Florida	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Georgia	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Hawaii	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Idaho	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Illinois	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Indiana	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Iowa	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Kansas	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Kentucky	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Louisiana	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Maine	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Maryland	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Massachusetts	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Michigan	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Minnesota	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Mississippi	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Missouri	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

STATE	WILLFUL ENDURER	SELF ACHIEVER	BALANCE SEEKER	DIRECTION TAKER	PRIORITY JUGGLER
Montana	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nebraska	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Nevada	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
New Hampshire	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
New Jersey	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
New Mexico	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
New York	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
North Carolina	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
North Dakota	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Ohio	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Oklahoma	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Oregon	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pennsylvania	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Rhode Island	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
South Carolina	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
South Dakota	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Tennessee	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Texas	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Utah	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Vermont	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Virginia	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Washington	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
West Virginia	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Wisconsin	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Wyoming	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]

Source: Trilliant Health national consumer database.

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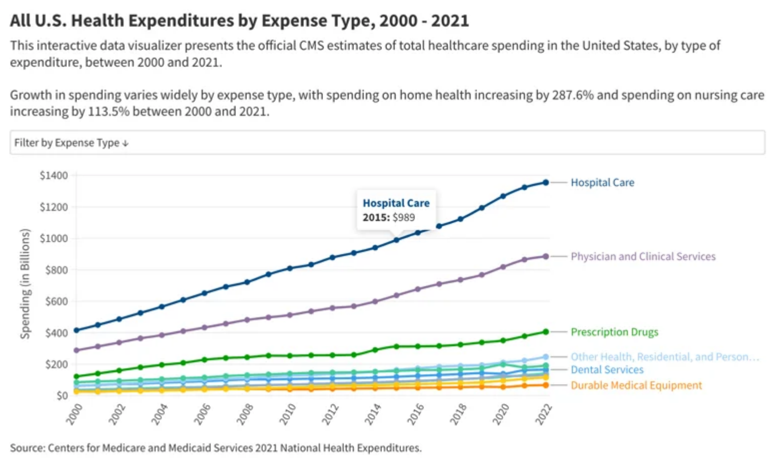
Strategic Resources

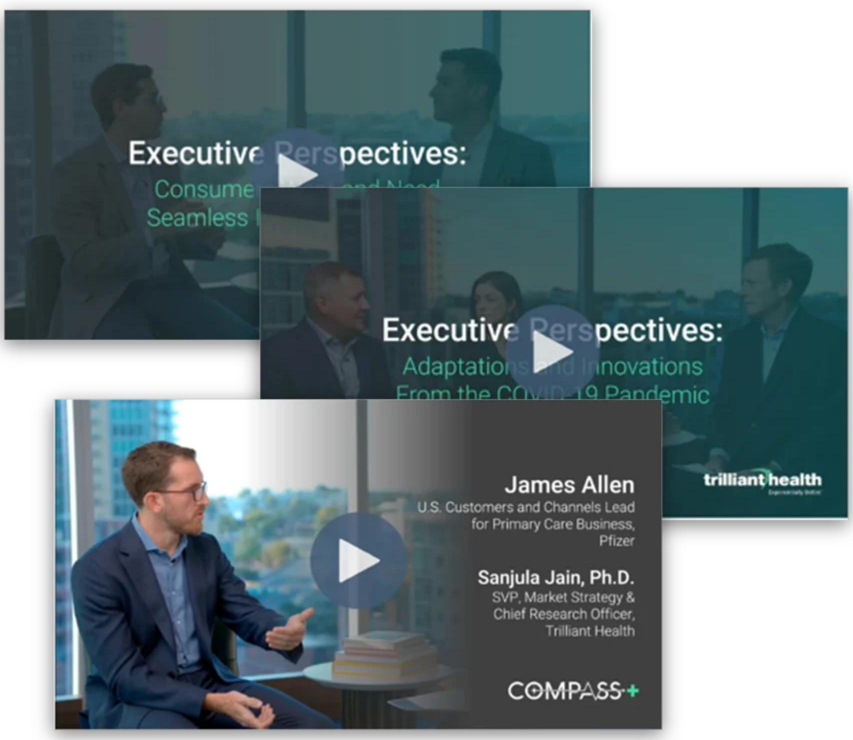
Explore state-level psychographic distributions to elevate your understanding of national psychographic variation.

Access Here →



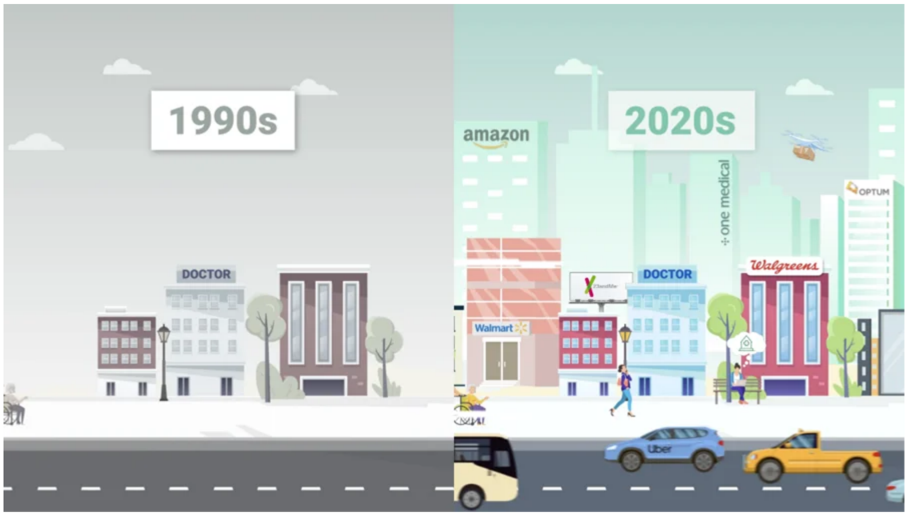
Data Tracking

Utilize interactive visualizations to stay abreast of patterns and trends in healthcare driving evolution in the national psychographic distribution. Discover **the costs associated with healthcare** and delve into **patterns in patient care** to gain insights into patient access and resource allocation.



Executive Perspectives

Watch a Compass+ exclusive interviews with **Todd Latz**, Chief Executive Officer of GoHealth Urgent Care, **Sara Vaezy**, Executive Vice President and Chief Strategy and Digital Officer of Providence, **Terry Shaw**, President and Chief Executive Officer of AdventHealth, and **James Allen**, U.S. Customers and Channels Lead for Primary Care Business at Pfizer, exploring consumer preferences and impacts of the COVID-19 pandemic on care delivery and consumer pathways. Watch **Video 1**, **Video 2**, **Video 3**.



Essential Concepts

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