

# Consumer Health and Wellness Segments

## Predicting Responsiveness to Emerging Healthcare Consumption Trends

IRIS MEETING, TORONTO, FALL 2017



# Overview:

## The Need

Emerging healthcare trends will have natural audiences; however, targeting of new drugs, devices, treatments, preventions, insurance, etc. will require customization to differing health mindsets for maximum uptake

## Segmentation Approach

Built on fundamental social values, mindsets and motivations, plus an extensive assessment of health beliefs, needs and motivations

## Methodology


Quantitative survey; return to sample based on the 2017 Canada Social Values survey; n = 2,000

# Content:

Asked nearly 200 questions on:

- Health beliefs, perceived threats, susceptibility, control and efficacy
- Health status, conditions, recent exposure to system
- Health behaviours, lifestyle, prevention
- Health information search: channels, sources
- HCP confidence, experience
- Physician experience, interaction quality, concordance, compliance

# Analysis:

1. PCA to reduce data to 40 factors
  2. Indexing
  3. Selection of key factors for segmentation
  4. Latent Class Analysis
  5. DFA reverse engineering
  6. Profiling (including social values)
  7. Mapping (in progress)
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- An abstract graphic composed of overlapping, semi-transparent geometric shapes, primarily triangles and polygons, in shades of purple and blue. The shapes are layered, creating a sense of depth and complexity. Some shapes have internal patterns of fine lines or dots. The overall effect is a modern, technical-looking design.

## 3 Axes of Differentiation:

1. (38%) Health Control/Effort + Belief/Confidence in Traditional HCPs
  2. (32%) Health Control/Effort + Belief/Confidence in Alternative HCPs
  3. (25%) Health Fatalism/Illness Susceptibility
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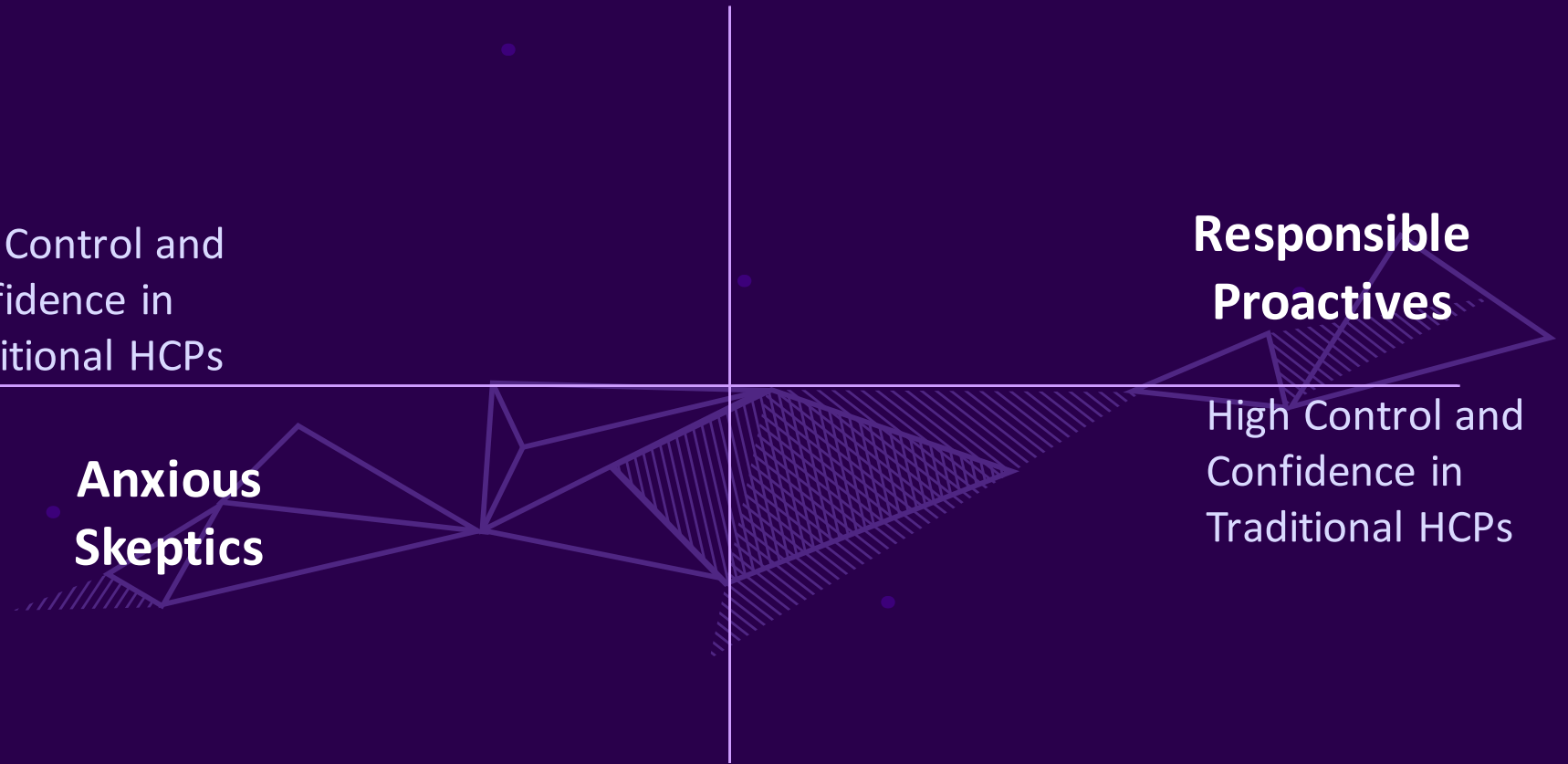
# The Health and Wellness Psychographic Space

Low Control and  
Confidence in  
Traditional HCPs

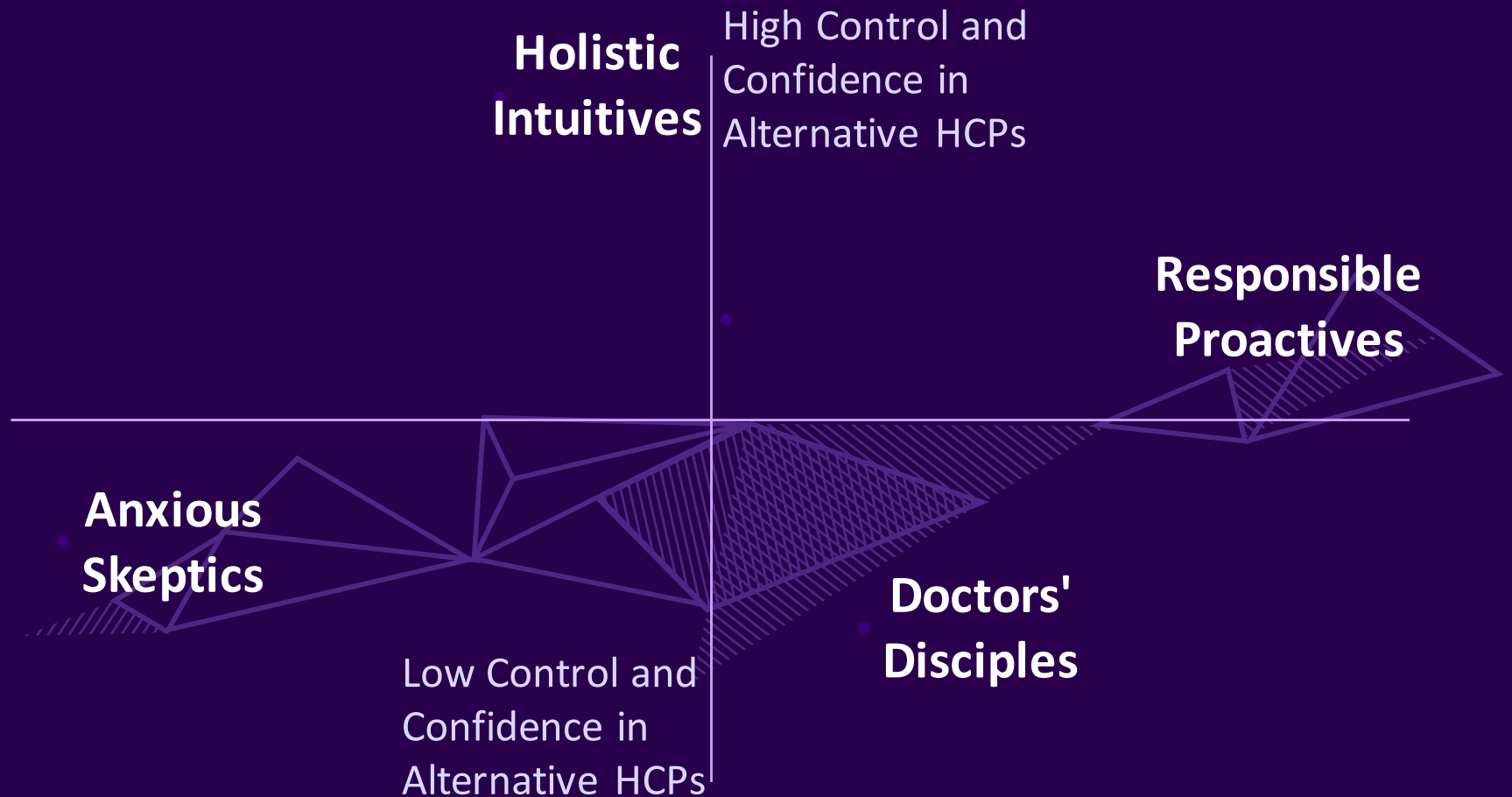
**Anxious  
Skeptics**

**Responsible  
Proactives**

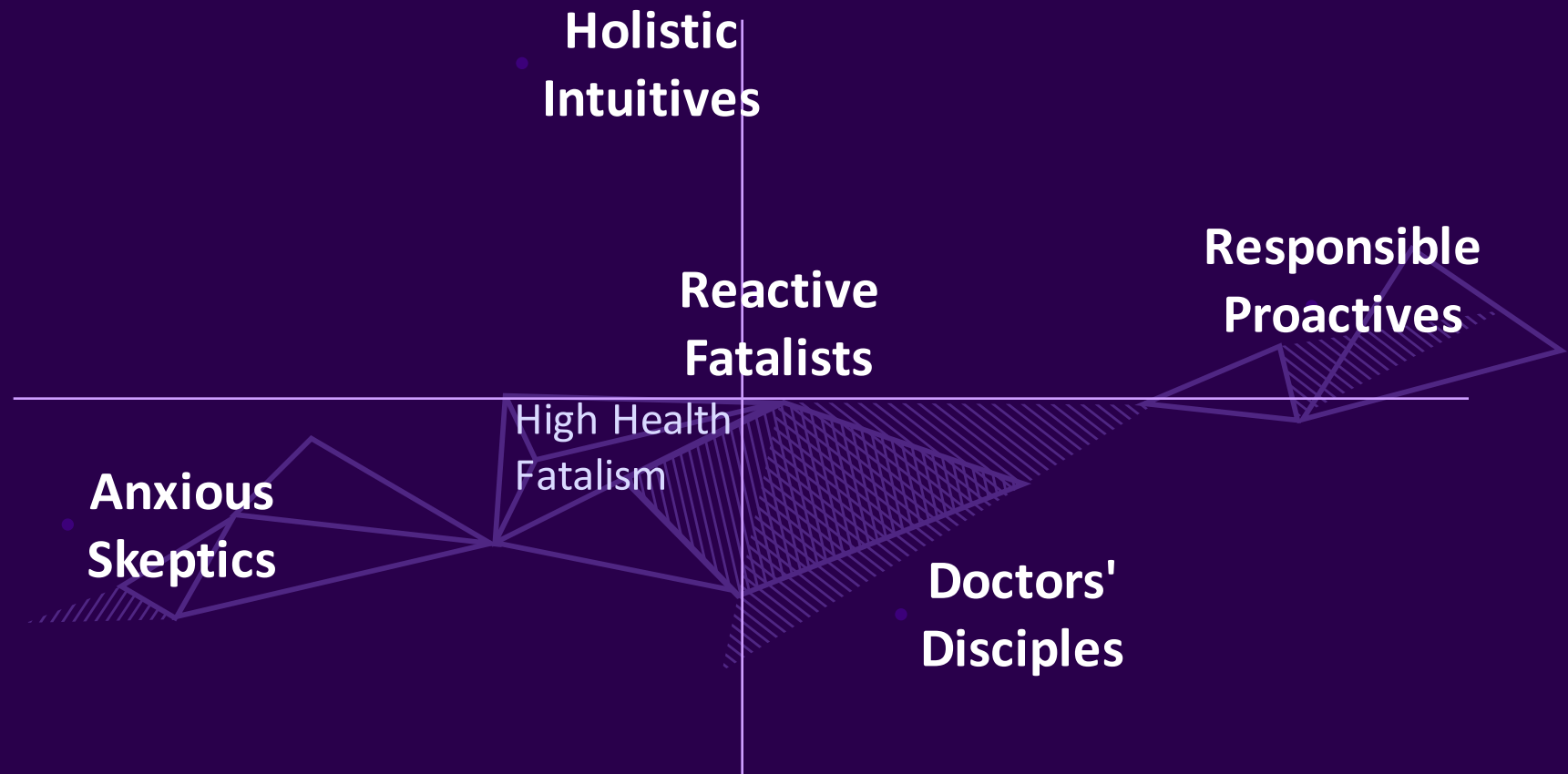
High Control and  
Confidence in  
Traditional HCPs



# The Health and Wellness Psychographic Space



# The Health and Wellness Psychographic Space





# Causes and Consequences

Anxious Skeptics	Responsible Proactives	Holistic Intuitives	Doctors' Disciples	Reactive Fatalists
17%	18%	18%	32%	16%

Personal Control  
Health Fatalism



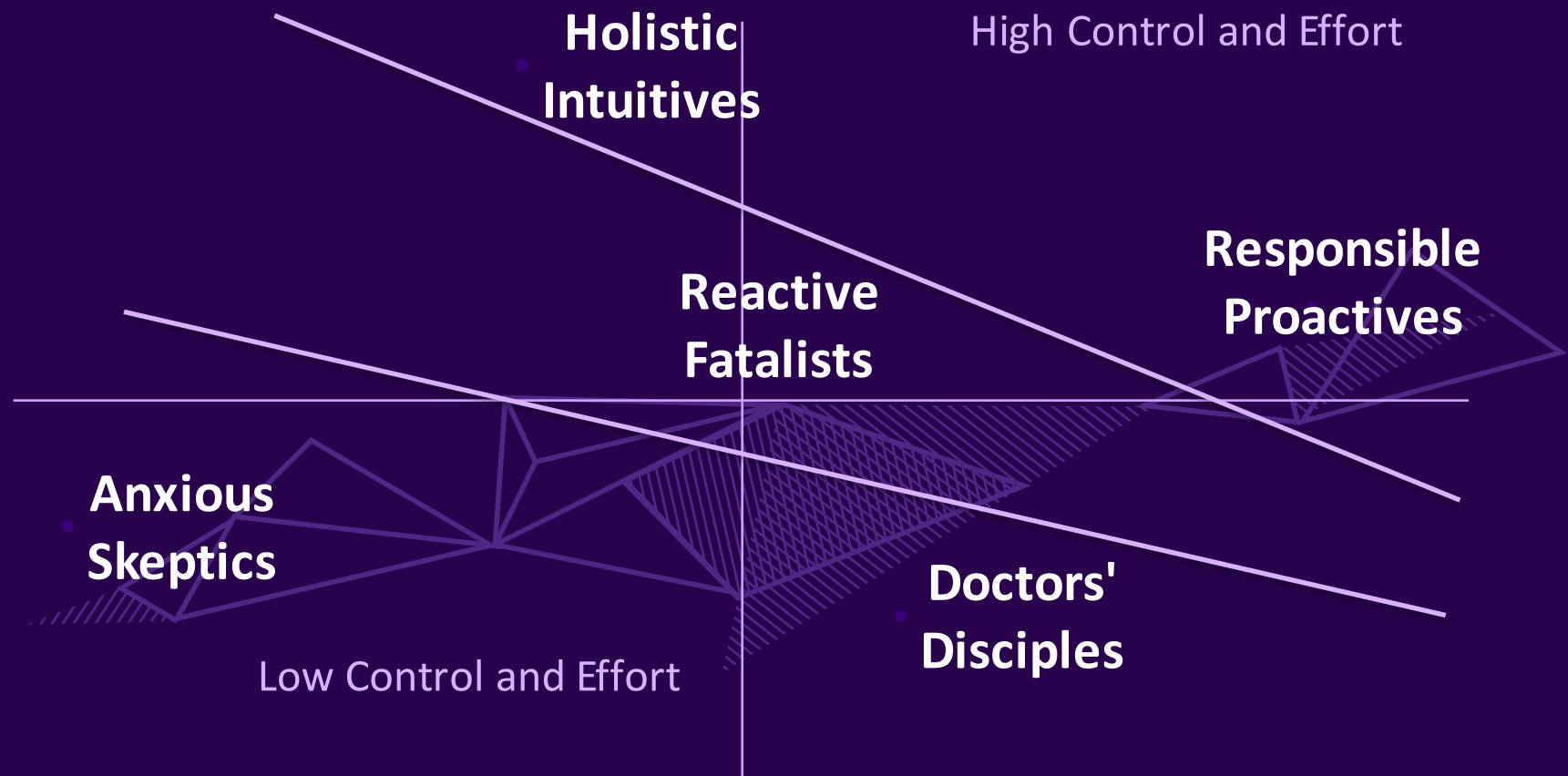
Effort Toward Health

71	153	129	90	60
95	20	12	113	269

64	179	145	59	85
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Index Scores	
[Red]	>= 180
[Orange]	140 to 179
[Yellow]	115 to 139
[Grey]	86 to 114
[Green]	61 to 85
[Light Blue]	21 to 60
[Dark Blue]	<= 20

# The Health and Wellness Psychographic Space



# Causes and Consequences

Anxious Skeptics	Responsible Proactives	Holistic Intuitives	Doctors' Disciples	Reactive Fatalists
17%	18%	18%	32%	16%

Effort Toward Health



Obedience to Authority

Rejection of Authority

Confidence in Traditional HCPs

Confidence in Alternative Therapies



Doctor-Patient Concordance

Drug Non-Compliance

64	179	145	59	85
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90	145	84	92	94
109	88	142	88	81
23	139	65	118	144
66	68	218	54	136

21	173	77	90	150
105	31	161	33	243

Index Scores

Dark Red	>= 180
Red	140 to 179
Yellow	115 to 139
Light Green	86 to 114
Green	61 to 85
Cyan	21 to 60
Blue	<= 20

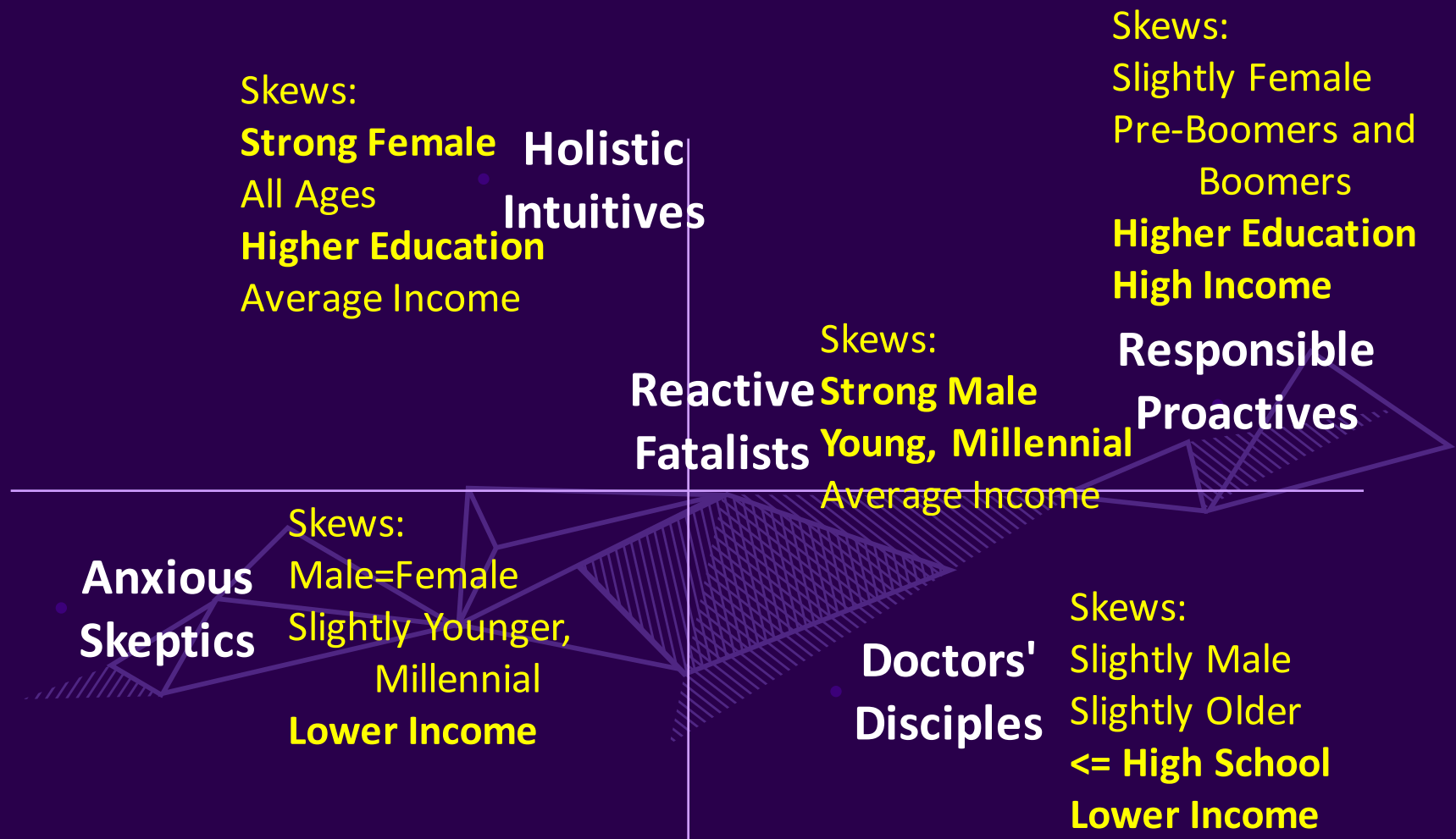
# Social Values Profiling

Anxious Skeptics	Responsible Proactives	Holistic Intuitives	Doctors' Disciples	Reactive Fatalists
17%	18%	18%	32%	16%

Existential Dread	147	88	88	90	97
Anomie/Aimlessness	162	30	74	88	166
Daily Stress	153	51	94	92	120
Acceptance of Violence	120	57	63	83	205
Faith in Science	89	125	80	83	142
Vitality	60	192	115	47	131
Personal Expression	66	139	162	54	116
Spiritual Quest	96	104	157	66	106
Personal Creativity	89	154	147	50	101

Index Scores	
<span style="background-color: #800000; color: white; padding: 2px;"> </span>	>= 180
<span style="background-color: #FF0000; color: white; padding: 2px;"> </span>	140 to 179
<span style="background-color: #FFD700; color: black; padding: 2px;"> </span>	115 to 139
<span style="background-color: #808080; color: white; padding: 2px;"> </span>	86 to 114
<span style="background-color: #008000; color: white; padding: 2px;"> </span>	61 to 85
<span style="background-color: #00BFFF; color: black; padding: 2px;"> </span>	21 to 60
<span style="background-color: #000080; color: white; padding: 2px;"> </span>	<= 20

# Demographic Skews



# Health and Wellness Battle Cries

**Anxious  
Skeptics**

**17%**

**Trust  
nothing and  
no one!**

**Responsible  
Proactives**

**18%**

**It's up to me  
and I can do  
it!**

**Holistic  
Intuitives**

**18%**

**Take control;  
explore the  
whole!**

**Doctors'  
Disciples**

**32%**

**Dr. knows  
best!**

**Reactive  
Fatalists**

**16%**

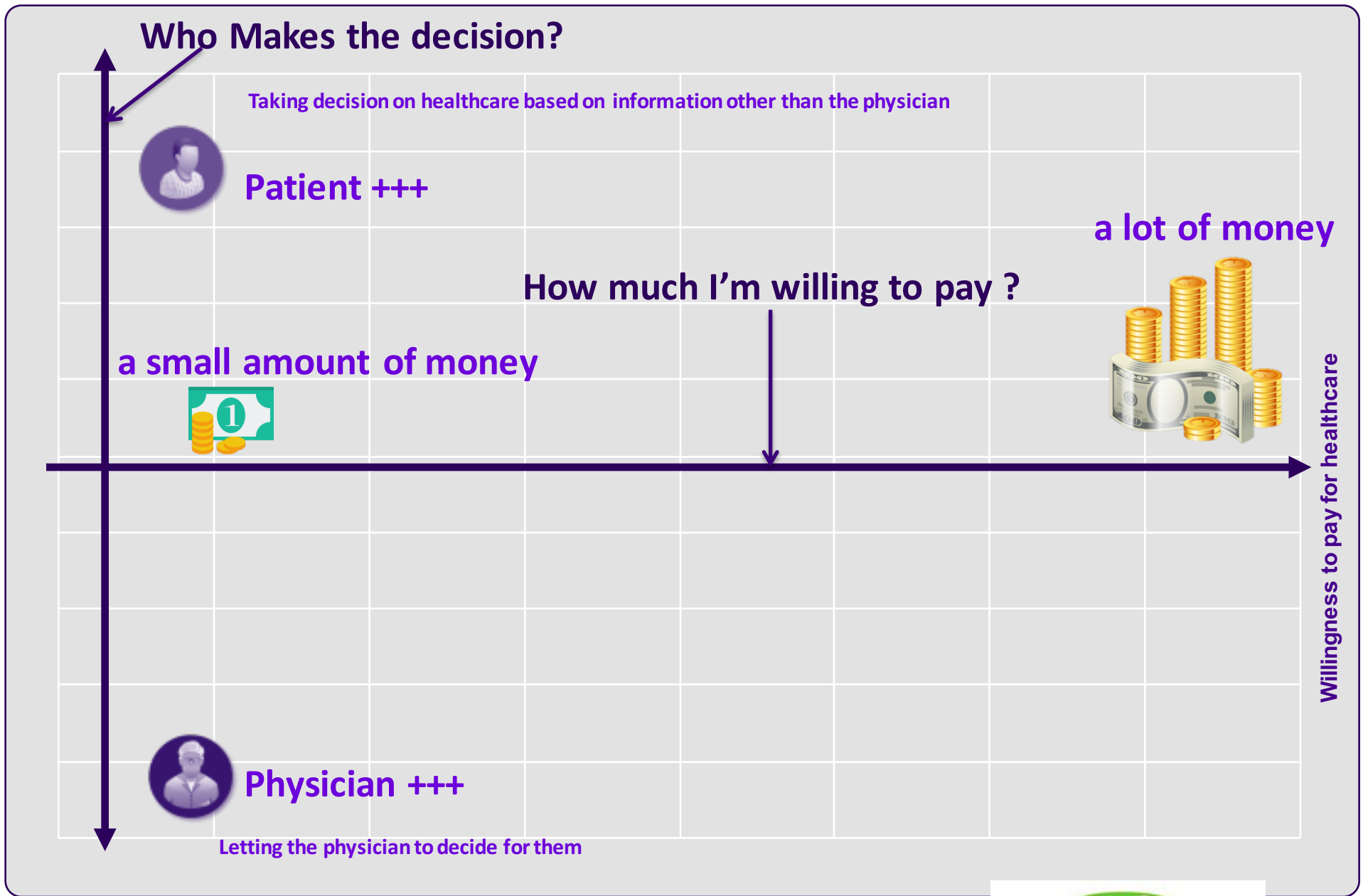
**Hey,  
whatever; it  
is what it is**



# Implications for Consumption:

- Natural affinities in willingness to pay for different products and services by segment
- Potential for customizing messages to expand natural affinities with secondary segments erode barriers to willingness
- Kinds of HC products/services will matter: typologize

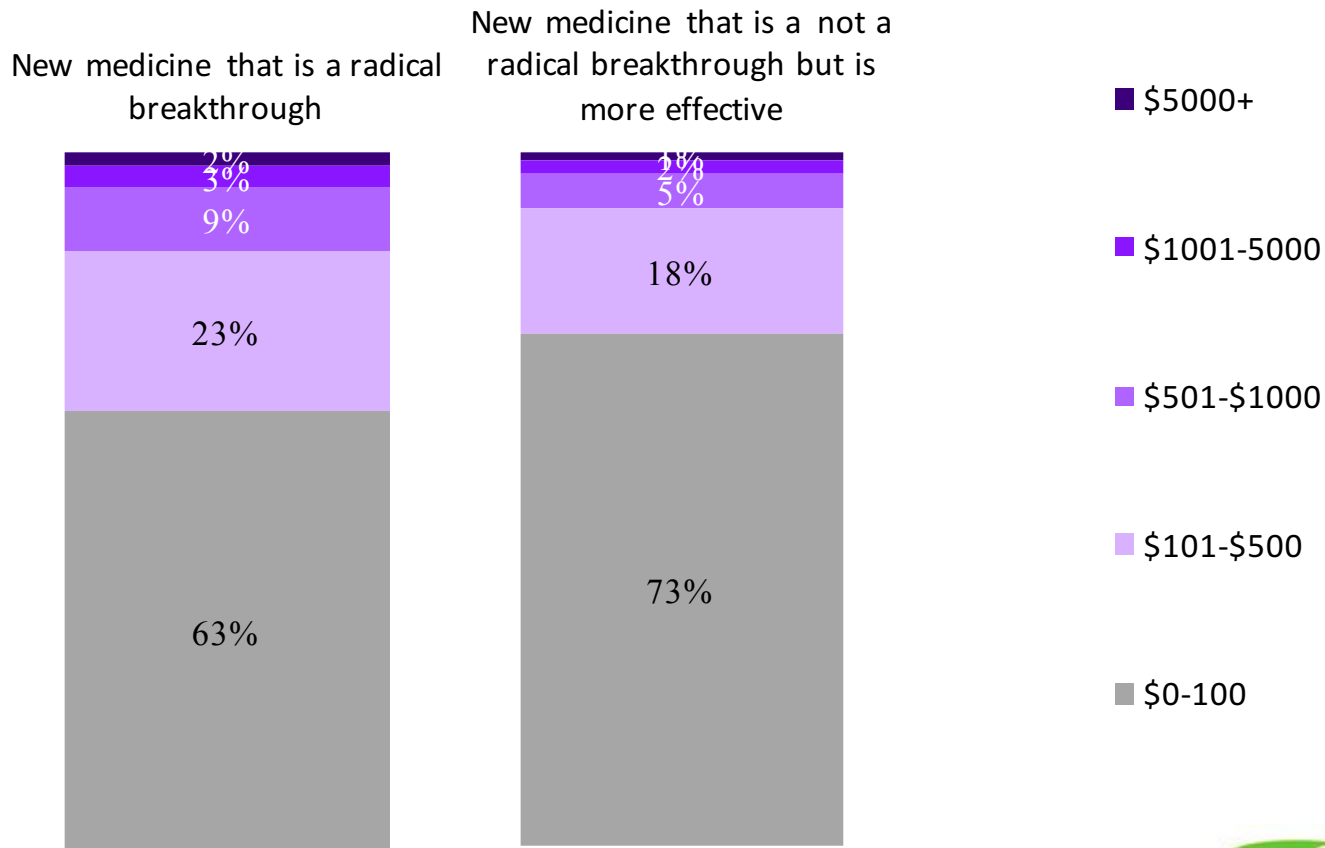
# EXAMINING WILLINGNESS TO PAY





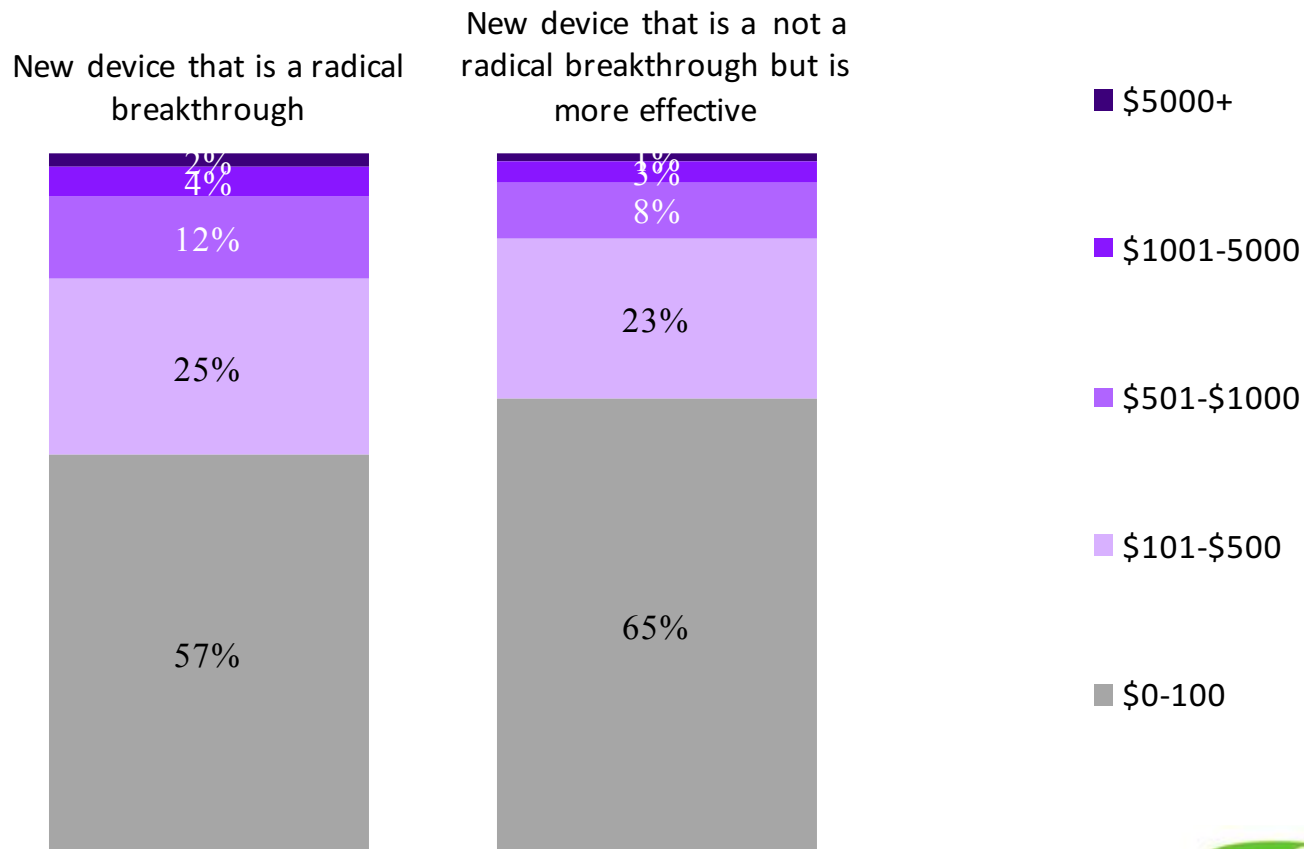
# CANADIANS' WILLINGNESS TO PAY OUT OF OWN POCKET FOR NEW MEDICATIONS

*Most are only willing to pay up to \$100 out of their own pockets for new medications. Willingness to pay more is greater for breakthrough meds, but not as much as one might expect.*



# CANADIANS' WILLINGNESS TO PAY OUT OF OWN POCKET FOR NEW MEDICAL DEVICES

**2 in 10 are willing to pay \$500+ out of their own pockets for a breakthrough medical device. However, as was the case with new medications, there is strong reluctance among most to pay more than \$100.**



QZ 17: How much are you willing to pay out of your own pocket for....

# Natural Affinity Hypotheses for Willingness to Pay

	<b>Anxious Skeptics</b>	<b>Responsible Proactives</b>	<b>Holistic Intuitives</b>	<b>Doctors' Disciples</b>	<b>Reactive Fatalists</b>
	<b>17%</b>	<b>18%</b>	<b>18%</b>	<b>32%</b>	<b>16%</b>
<b>Willingness to Pay Variable Classes:</b>					
Immediate comfort/relief	No	Drugs/Medicines Devices Treatments	Treatments	Drugs/Medicines Devices Treatments IF DIRECTED	Drugs/Medicines Devices Treatments
Long term solutions	No	Drugs/Medicines Devices Treatments	Treatments	Drugs/Medicines Devices Treatments IF DIRECTED	No
Innovative/Alternative	No	Drugs/Medicines Devices Treatments	Treatments	Drugs/Medicines Devices Treatments IF DIRECTED	No
Experimental	No	Drugs/Medicines Devices Treatments		Drugs/Medicines Devices Treatments IF DIRECTED	No
Prevention	No	Drugs/Medicines Devices Treatments	Treatments	Drugs/Medicines Devices Treatments IF DIRECTED	No
Monitoring	No	Drugs/Medicines Devices Treatments	Devices Treatments	Drugs/Medicines Devices Treatments IF DIRECTED	Devices
Diagnostic	No	Drugs/Medicines Devices Treatments	Treatments	Drugs/Medicines Devices Treatments IF DIRECTED	No
<b>Insurance for Faster/Higher Quality:</b>					
Access to GPs	No	Yes	No	Yes	No
Access to Specialists	No	Yes	No	Yes	No

# Thank you !

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