



# PatientConnect

## VALUES-BASED SEGMENTATION

Understanding what *Social Values* drive  
decision making for healthcare patients

**ENVIRONICS**  
RESEARCH



# Our DNA

Creating a good customer experience means knowing what drives them and understanding why they do the things that they do.

**Environics Research digs deep into customer's social value systems and delivers a simplified approach for high engagement and measurable results.**

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# ABOUT PATIENTCONNECT

As organizations work to keep pace with evolving public expectations and preferences, those in the healthcare industry can benefit from developing a nuanced understanding of healthcare users, instead of relying on broad generalities associated with factors such as age, gender or health related variables like family health history, chronic conditions etc ...

**PatientConnect was developed to illuminate the values and perspectives of individuals, specifically as these factors relate to health.**

# EXECUTIVE SUMMARY

**Research In today's economy, customers in Canada have grown accustomed to being well understood by retailers and service providers. In extreme cases, retailers even anticipate customers' wishes before customers themselves notice a need or desire.**

This context places pressure on everyone, including healthcare providers, to personalize what they offer – from therapies and treatments to communications. The goal is to understand where people are on their healthcare journeys and meet them there.

To meet this goal, it's valuable for healthcare-focused organizations to understand people's:

- 1** Knowledge of their health and the importance they place on it in their lives.
- 2** Preferences as to how they manage their health.
- 3** Concerns about their health.
- 4** Concerns about the health care system.
- 5** Preferences about how to interact with their doctor or other healthcare professionals and healthcare organizations.

# PRIORITY TAKE-AWAYS

By offering a richer understanding of healthcare users' outlooks, PatientConnect can help healthcare leaders:

- 1 Craft better health programs**  
Using insights about patients' preferences and priorities to support patients in making healthy choices.
- 2 Improve healthcare communications**  
Creating messages that resonate with audiences' existing understanding and priorities.
- 3 Provide improved support to members of equity-deserving groups**  
Using an evidence-based framework to combat harms that may be associated with biases or unfounded assumptions.
- 4 Increase compliance with treatment recommendations**  
Building trust by demonstrating a non-judgmental understanding of how patients may be relating to, for example, a physician as an authority figure.
- 5 Operate and communicate in more patient-centric ways**  
Putting patients' values and perspectives at the heart of interactions.

# METHODOLOGY



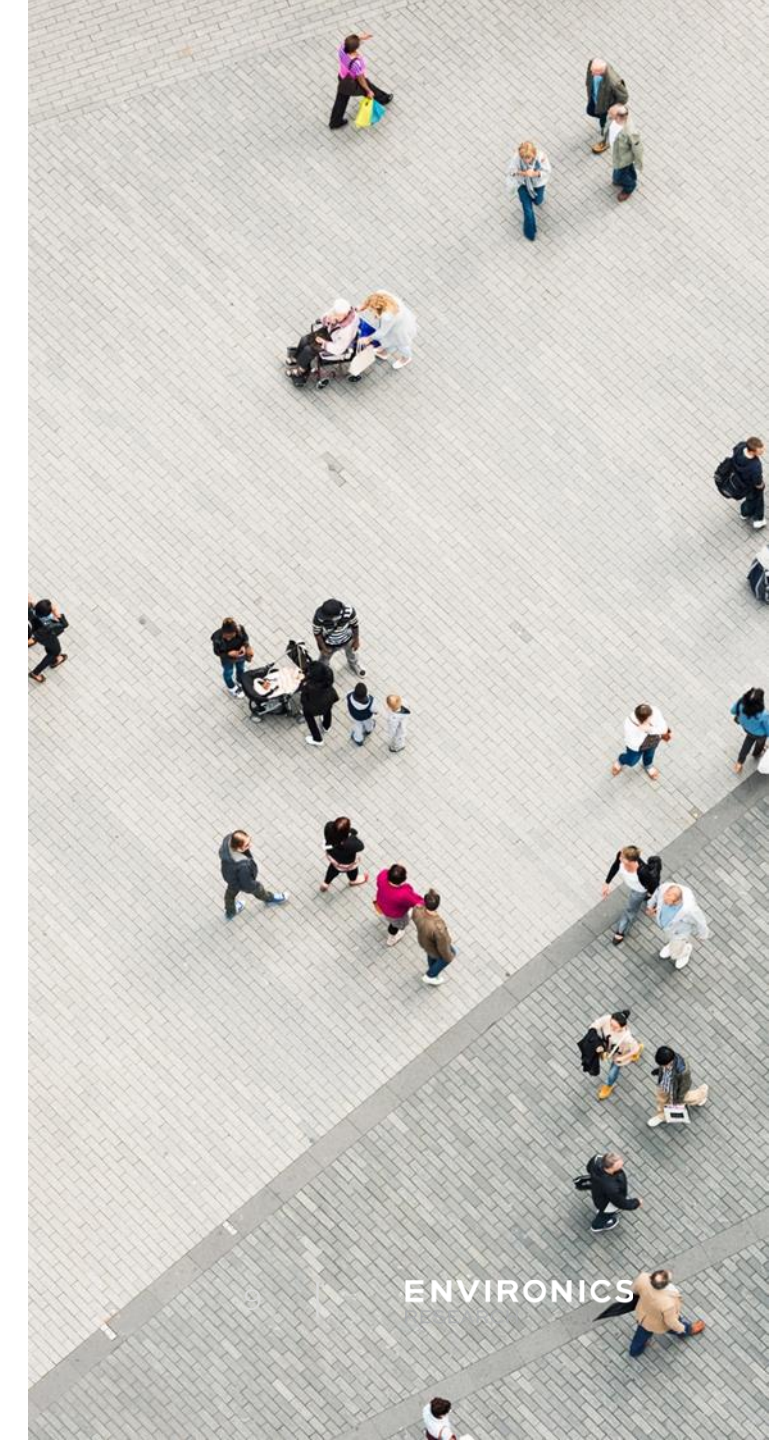
# PatientConnect

## Social Values

**Social Values offer a more nuanced view of individuals and how they manage their health. Allowing researchers to:**

- 1** Gain a deeper understanding of the motivations behind individuals' behaviour
- 2** Reduce the influence of stereotypes and personal bias in communications
- 3** Create a more empathetic foundation for conversations with patients
- 4** Provide a different perspective to policy makers and influencers, unlocking new ideas
- 5** Tailor and refine the tone and content of messages to influence behaviour change

Social Values are so deeply embedded in how we understand and respond to the world that it's easy to lose sight of them. Individuals can find their own values so natural and intuitive that they are guided by values without even realizing these constructs are at work. But once we start to unpack the deep structures that guide our own actions – and consider how these structures differ in other people – a richer and more nuanced view of health-related thinking and behaviour emerges.



# PatientConnect

## Taking a values-based approach

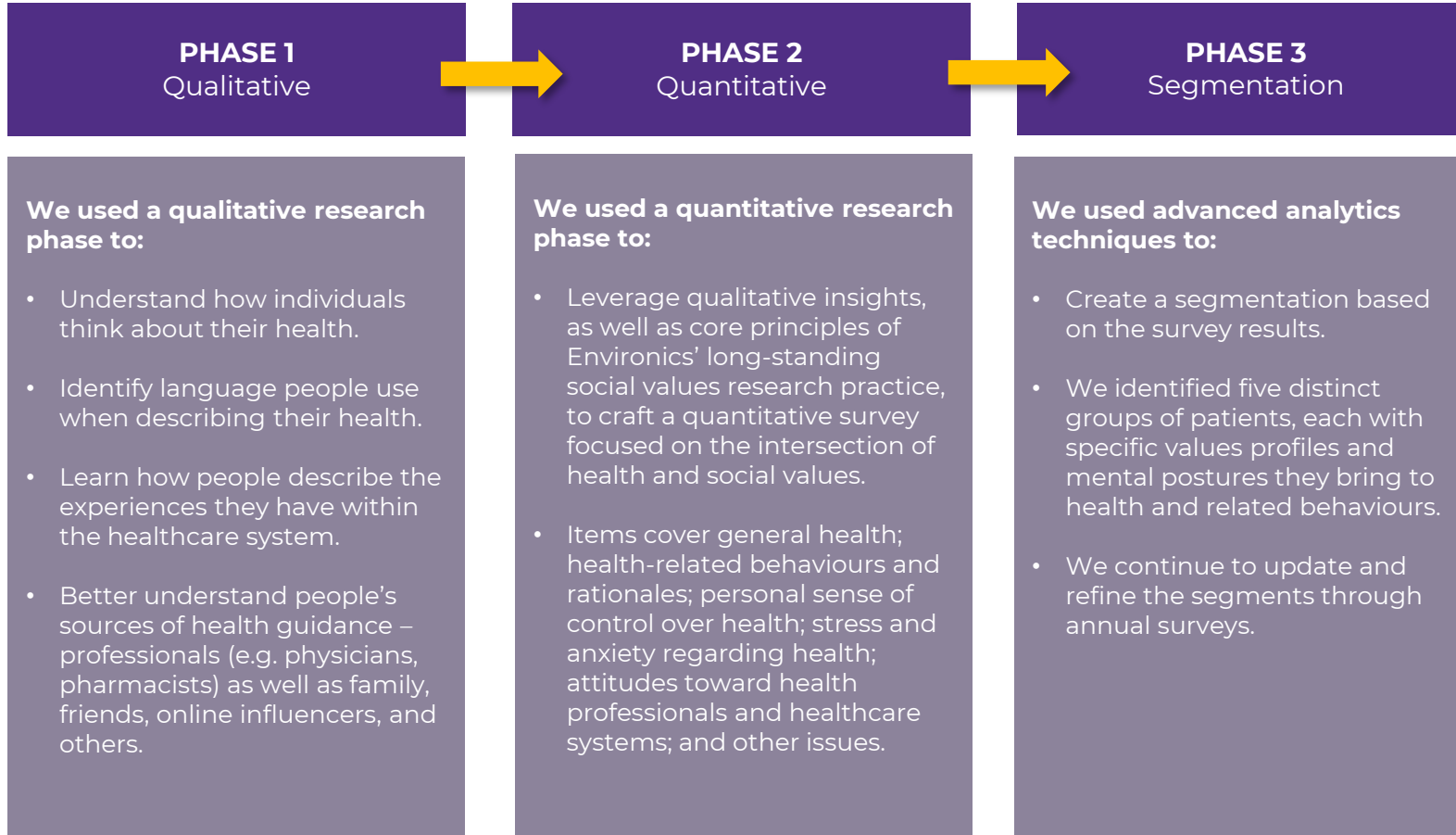


Aligning healthcare strategies with values fosters a deeper connection, trust, and engagement with patients, leading to more meaningful and sustainable changes in health behaviors. In essence, unlocking the power of values allows us to bridge the gap between medical knowledge and patient action, paving the way for a healthier and more empowered society.

**VERBATIM SOURCE:** Vijay Wadhawan | Environics Research



# PatientConnect Research Phases



# PATIENT CENTRICITY

# Patient Centricity

## Why is patient-centricity so important in today's healthcare landscape?

Patients' expectations of the experiences they want to have while accessing healthcare are changing. These expectations are shaped by experiences they are having outside of the healthcare system, which are often driven by some of the most sophisticated and data driven organizations who are able to deliver messages, products and services that are targeted to individuals. People are being interacted with in a way that is based on a deep and nuanced understanding of individual behaviours and the drivers of those behaviours.

By illuminating the distinct perspectives and motivations of different patient segments, PatientConnect helps our clients gain insight into topics such as:

- How individuals want to be treated within the healthcare system
- What the expectations of individuals are
- How individuals perceived the control they have over their health
- Confidence in traditional medicine versus alternative approaches to care
- Perspectives on physician interactions and expectations of physicians and other HCPs
- Attitudes toward the importance of following treatment directives
- Effective medication usage communications.

To maintain strong and productive relationships with patients, the health sector needs to keep pace with changes in the wider context, which will require tailored and meaningful communications and connections with individuals around their health and wellness.



# Patient Centricity

## Why is patient-centricity so important in today's healthcare landscape?

Another important trend that has been growing over the years is the increased participation and input patients have in their healthcare decisions, at a time when there is more choice and complexity in the solutions being created today. The proliferation of information online, wide array of options for healthcare products and the increasingly mainstream awareness of personalized (i.e. genetically tailored) medicines have given more patients not only a desire for a “personal touch” but a sense that personalization can be important to their health outcomes.

There will always be knowledge gaps when trying to understand specific populations within the healthcare system but the risk in trying to fill those knowledge gaps with assumptions or biases based on past experiences or only a topical understanding of individuals takes away from the potential for healthcare organizations to offer meaningful and targeted solutions to individuals.

It can be challenging for health care organizations to imagine how the healthcare landscape might appear to an individual who does not have the same level of understanding on the healthcare system and is not working in it every day - whether the patient is navigating a health system or choosing a treatment.

The more healthcare organizations can see barriers and challenges from patients' perspective, the better support they can offer. The goal is not only to show empathy but also to engage on terms that are meaningful to patients, helping them increase their sense of power and control over their health choices – as opposed to feeling that they are simply following instructions they may not see as meaningful or important.



# Patient Centricity

## Why is patient-centricity so important in today's healthcare landscape?

### A couple of examples:

- 1 There are many antidepressants available, each with advantages and disadvantages. Such treatments are often combined with lifestyle adaptations and other supports. Patients are likely to be reassured by the awareness that care providers have a holistic understanding of their needs and histories.
- 2 Although how patients manage diabetes can make a significant difference to their outcomes – and certified diabetes educators and nurses can offer specialized support – some patients doubt the value of such offerings. Enhanced communication, grounded in an awareness of patient priorities, can persuade and empower reluctant participants.



# Patient Centricity

## The patient-provider relationship



In today's evolving landscape of healthcare, patient centricity is no longer a choice, but an imperative. Placing the patient at the heart of every decision and action reminds us that healthcare is not just about treating ailments, but about understanding and valuing the individual behind the condition.

**VERBATIM SOURCE:** Ahsan Sadiq | Environics Research





# PATIENTCONNECT SEGMENTATION

# PatientConnect

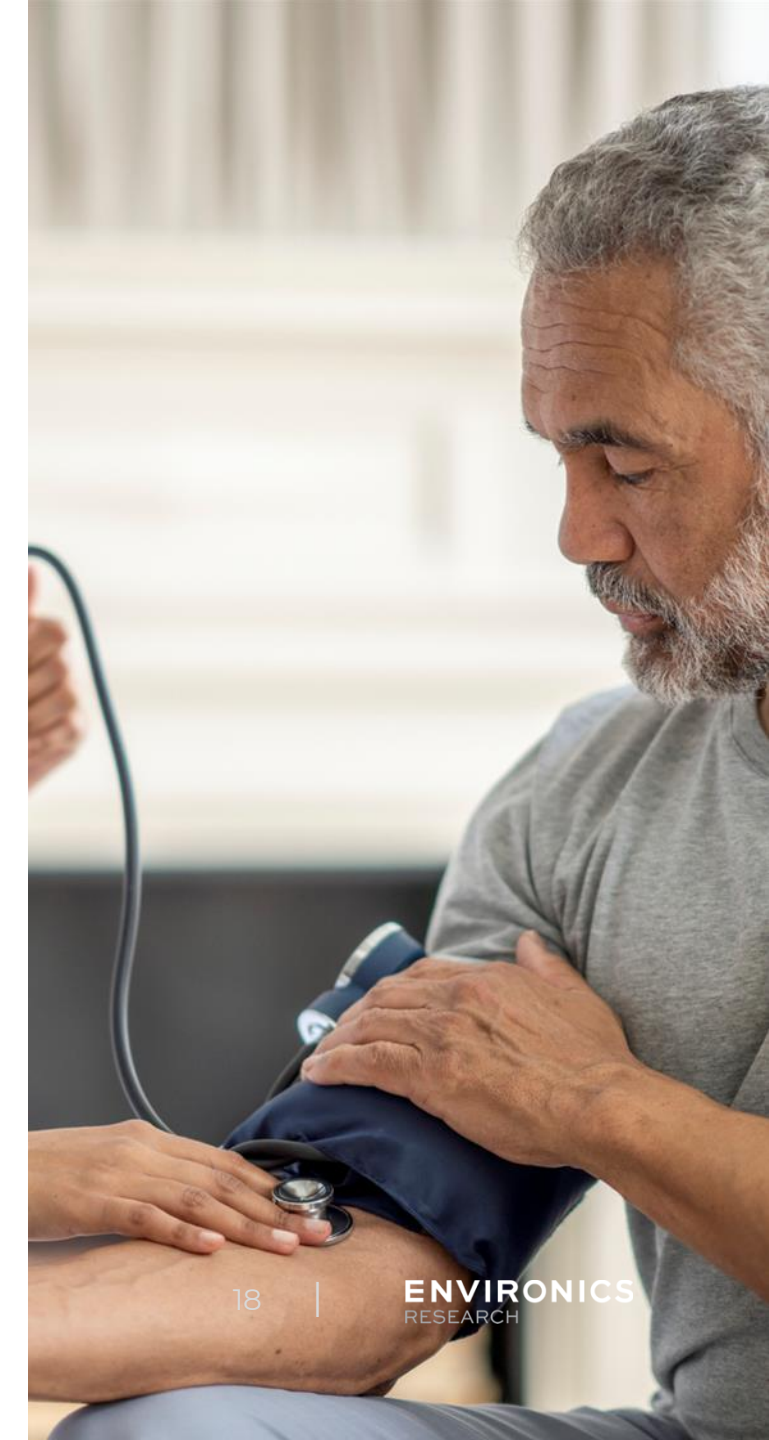
## A tool that segments patients by Social Values

PatientConnect is a framework for understanding the distinct perspectives and values patients bring to their health, and how they influence related choices about lifestyle, treatment, and engagement with their own health.

By using constructs that run deeper than standard opinion surveys – drilling down into concepts such as orientation to authority, autonomy, status, and security – we gain insights into more fundamental drivers of patients' thinking and behaviour.

Using multivariate analysis of a robust data set that includes numerous annual waves of detailed surveys, we segment patients into five distinct groups based on their values. We can also map more topical or emerging questions – such as attitudes toward AI in healthcare or the acceptance of vaccines – onto the long-standing values segmentation system.

PatientConnect is the latest tool we've developed from our long-standing social values practice, which applies psychographic insights to a wide range of social and business questions. In the health sector, the precursor to PatientConnect was MDConnect™, a tool that focuses on physicians' mindsets, motivations, and values. Developing a framework focused specifically on patients was a natural next step, especially given the increasing emphasis on patient-centric approaches across the health sector.



# PatientConnect Segmentation Overview

The social values framework situates individuals with similar values close together. Based on their social values, the segments for Patients are plotted as shown on the facing panel:

<b>Impulsive Fatalists</b>	17% of Patients	Survival & Individuality
<b>Anxious Avoiders</b>	18% of Patients	Survival & Individuality
<b>Health-Seeking Intuitives</b>	17% of Patients	Fulfilment & Individuality
<b>Doctors' Disciples</b>	31% of Patients	Survival & Conformity
<b>Responsible Proactives</b>	17% of Patients	Fulfilment & Conformity



# Key Demographics

## Doctors' Disciples



Deferential



Skews slightly male and lower education, lower income



Traditional and trust doctor



Have low levels of trust in the efficacy of lifestyle changes, Natural or Eastern medical practices



# Key Demographics

## Responsible Proactives



Independent and feels in control of their life



Skews female, pre-boomer / boomers



Pro-technology



Higher education and income

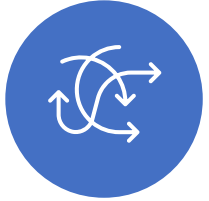


# Key Demographics

## Impulsive Fatalists



Impulsive and tend to say yes without deliberation



No clear direction



Believe that medicine will have a cure



Skews young and male



# Key Demographics

## **Anxious Avoiders**



Fearful of physical and mental decline



Low confidence that solutions are available for them



Little effort to preserve their health



More likely to be online



# Key Demographics

## Health-Seeking Intuitives



Spiritual and holistic



Non-traditional



Believe in their ability to keep themselves healthy



Skews female





# PatientConnect

## Which patient segment is most prevalent in Canada

**Those that work in healthcare have values, too.**

Although Doctors' Disciples are currently the largest segment, they also skew older and as Canadians age they will represent a smaller share of the total PatientConnect population. This segment shows a level of deference to doctors' authority that is increasingly uncommon in the Canadian values landscape. Declining deference has been among the most powerful psychographic trends in Canada over the last few decades. Doctors' Disciples show extreme deference to physicians. Their perspective can be summed up as, "You're the doctor; I'll do what you say without question." It's increasingly rare for Canadians, especially younger ones, to relate to any authority figure in this way – not only doctors but also politicians, business leaders, teachers, religious authorities and others.

It's not only patients who are questioning doctors' authority. Doctors themselves are also members of society and shaped by social change. They are becoming more egalitarian in their approaches – involving and engaging patients in medical decisions instead of issuing "doctor's orders." Generally speaking, the decline of deference will mean not only that Doctors' Disciples make up a smaller share of the population, but that deference (already lower among other groups) will decline further across all segments.



# PatientConnect

## How PatientConnect segments reflect broad social trends in Canada

Responsible Proactives are overrepresented in populations that work within the healthcare space – especially in fields such as program and policy development, and health care marketing.

This pattern introduces the potential for bias in the way people working in health care think about health challenges and responses. Since there's a good chance that colleagues in health care will share similar values, even an organization that deliberately undertook a vigorous, participatory discussion about a given solution might arrive at a plan that was likely to resonate strongly with only a minority of Canadians.

By understanding which segment, they belong to – and remaining mindful that theirs is just one values profile among the five major ones in the Canadian population – people that work within the healthcare space can improve their ability to identify and offset their own biases. This can help to ensure that the programs, policies, marketing, and communications they develop resonate with other segments who are often the ones who need it most.



# PatientConnect Embracing change



To meet the needs of this dynamic population, healthcare must adapt and embrace a culturally sensitive and inclusive approach. By recognizing and respecting the unique values of each individual, we forge a stronger and more equitable healthcare system that empowers and nurtures the health and well-being of all Canadians.

**VERBATIM SOURCE:** Vijay Wadhawan | Environics Research



# BARRIERS & OPPORTUNITIES

# Barriers & Opportunities

## The Social Values Approach

The social values approach can be a productive shift in perspective – especially for health leaders, who may be more accustomed to thinking about patients in terms of health status, demographics, risk factors, and other dimensions. At the same time, the novelty of the approach often gives rise to two key questions:

### 1 Will we be able to use these tools effectively?

Some individuals wonder whether they'll struggle to gain fluency with psychographics, and whether their organizations will be able to use social values segmentations effectively. Environics Research has helped hundreds of organizations unlock the potential of social values through carefully developed training and consulting offerings. A psychographic approach can complement – instead of replacing – existing tools. Organizations that are already using a segmentation based on another attitudinal or behavioural concept often find that values insights enrich and enhance the frameworks they're already using.

### 2 Will these tools be worth the investment of time and resources?

PatientConnect allows organizations to better understand – and focus on – specific gaps and opportunities. Its power is in helping leaders' direct resources to where they'll make the greatest difference. No offering or communication will capture the entire market at once. In a large, complex social landscape – and an area as nuanced as health – the ability to use evidence to refine and target a message is a powerful advantage.



# Conclusion

## How can you use PatientConnect to optimize your engagements on healthcare with Canadians?

When we work with clients, the first step is usually to integrate PatientConnect with their other research – helping them look at their existing patient research at a segment level, not just in aggregate. Taking this step helps to ensure that clients' data sets have adequate representation of the segments they're focused on reaching – whether that means all five segments or a subset of just a couple of groups.

As clients build familiarity with the segments, they become more attuned to nuances in their answers: the emphasis patients place on concepts like control or expertise, for example. Over time, an awareness of the different segments' preferences and sensibilities guides clients in optimizing messaging and imagery and helps to establish the appropriate level of detail and technical complexity.

Awareness of differences among segments can also help those that work in healthcare select the best channels for reaching patients.

For Doctors' Disciples, for example, conversations in their doctors' offices will command the greatest attention; this segment is unlikely to be seeking out health information independently, or heeding messages from sources such as online influencers.



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