



**Casey Albertson** is a global expert on motivating positive behavior.

Here are key take-aways from his conversation with Sherry Fox about motivating COVID-19 vaccination:

1. Psychographics is an effective way to segment groups of people to understand what motivates positive behavior change.
2. *PatientBond* has identified five segments of people, each one with different views about vaccinations, including against COVID-19.
3. Two segments are *most likely* to vaccinate: *Self Achievers* and *Direction Takers*. Both groups tend to be slightly older, have more diseases, trust physicians and see them more often.
4. Two segments *least likely* to vaccinate are *Balance Seekers* and *Willful Endurers*. They don't go to doctors as much and are suspicious of institutions.
5. Understanding these segments and what motivates them can be used to create more effective communication campaigns to improve vaccination rates.

### **You're a leading expert in the field of psychographics. What does it tell us about motivating people to be vaccinated against COVID-19?**

Psychographics studies the deep motivations about why people do what they do and adds to other ways we understand them. It is another way of segmenting a population, much like we would do with demographics.

Our research discovered there were five different segments in the population. Some are highly proactive; others are highly reactive. Their attitudes about COVID-19 vaccination are similar to their attitudes towards other vaccinations we have studied, like flu, DTP and polio.

**Self Achievers** are the most proactive and engaged. They are motivated by goals and the progress they make along the way. They like to have a plan and trust their physicians.

**Balance Seekers** are proactive but, surprisingly, are also the least likely to get vaccinated, especially since lots of people in this segment work in healthcare. They like options and choices, like to discover new and interesting solutions and make decisions for themselves.

**Priority Jugglers** are in the middle between being the most proactive or the most reactive. They put their own personal wellbeing behind the obligations they feel to others at work or at home. They sacrifice themselves for the good of the company, the community or their family.

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**Direction Takers** are reactive. They need clear, concise guidance from a credentialed source, like a physician and, especially, their physician.

**Willful Endurers** are the most reactive and disengaged. They tend to be younger and are nearly a third of the U.S. population. They live in the “here and now” and want immediate gratification, convenience, ease and simplicity. They are confident they can endure whatever comes their way, including pain. They’re tough and, since they’re wired to live in the moment, on average they have more bad health habits, like smoking, alcohol and drug abuse.

### Of these groups, which ones are the most likely to be vaccinated against COVID-19?

Of these five segments, two are *most likely* to vaccinate. The first are the *Self Achievers*, which are the most proactive, so we expected that. The second are the *Direction Takers*, one of the most reactive groups, which was something of a surprise. What both groups have in common is that they tend to be slightly older than the other groups, they have more diseases, see physicians more and have an affinity for – and trust in – physicians.

**Two segments are *most likely* to vaccinate: *Self Achievers* and *Direction Takers*. Both groups tend to be slightly older, have more diseases, see physicians more and trust physicians.**

**Two segments *least likely* to vaccinate are *Balance Seekers* and *Willful Endurers*. They don't go to doctors as much and are suspicious of institutions.**

We also found that two segments are *least likely* to vaccinate. *Balance Seekers* are a proactive group, but they also very independent thinkers. *Willful Endurers*, *on the other hand*, are a reactive group. What they have in common is they don't go to doctors as much and they are suspicious of institutions.

### Do these insights have predictive value?

Yes, we looked into that and saw that they do. Based on our data, we predict a quarter of the population will remain hesitant and immunization rates are projected to reach just 72% by the end of year two.

### Surely, senior leaders can help create change, right? How can they use the psychographics you've developed?

Based on our research, there are helpful actions to take and things to avoid. I'll start with things to avoid.

First, don't use fear as a motivation. That only works with *Balance Seekers*. They'll be vaccinated so they can care for others and meet their obligations.

Second, be cautious about mandates; only 10% of people agree mandates are helpful. Peer pressure is even less effective, so be cautious about that, too.

Third, temper your expectations about incentives like gift cards and lotteries. Only 12% of people say incentives were a motivating force.

Luckily, there are things you can do.

First, encourage people to see a doctor. We've looked at the literature and people's own primary care physicians are the most credible source of information.

Second, use the channel people prefer – email or a company newsletter – to provide information about vaccine safety and efficacy. Just as the five segments are motivated differently, they also share communication preferences.

Third, begin targeting your vaccination communications and outreach. For example, a simple survey can segment your patients psychographically, and our national data allows us to “heat map” where various segments are concentrated down to the neighborhood.

*Self Achievers* will create the fastest vaccination wins, so put billboards in those neighborhoods that track the progress we're making towards becoming immunized as a population.

Don't push *Balance Seekers* because they will “push back” the hardest. Rather, give them information and choices, acknowledge they know their body best, and allow them to make the best choice for them. Other groups may not read all the information we send, but this group will. They fear the vaccine was rushed to market, so remind them how long the vaccine has been in use to address that fear and, as each month passes, talk about what has gone 'right' with vaccinations.

*Willful Endurers* can be influenced with the right information, but from what we see many are not getting vaccinated. Billboards in their neighborhoods should explain the vaccine is free. Their knowledge about cost does not come from credible sources. In fact, the perceived vaccine cost is the number three reason why they're not vaccinated. They don't need lots of information, just the right message that the vaccine is free, and they won't be charged co-pays.

### **Some people might find your prediction about immunization rates disappointing. Is there any room for optimism?**

There's plenty of room for optimism. Psychographic studies show what appeals to different people and the beauty of social media is that messages can be very targeted. Community leaders today should be focused on getting the right message to the right place in the right way. Psychographic insights help.

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### **Working with you, senior leaders could identify the psychographic profiles within the company and the communities where they do business, is that right?**

Some already do and have done so for years. Based on those segments, they can deliver messages that are far more effective. To help jumpstart any COVID-19 vaccination projects, we already have substantial experience and data.

## Casey Albertson

Casey Albertson is Senior Vice President of *PatientBond*, responsible for *Strategic Accounts and Healthcare Consumer Insights*. He helped lead the development, execution, and analysis of *PatientBond's* psychographic model and national market research on healthcare consumer attitudes and behaviors towards COVID-19 and its vaccines. Prior to his current role, Casey had nearly 30 years of sales, marketing, and operational leadership experience in healthcare services, healthcare products and consumer products at Procter & Gamble.

## *PatientBond*

The 2021 Vaccination study was the 6<sup>th</sup> in a series dating back to 2013, using *PatientBond's* proprietary technology solution which segments consumers by psychological type. It is based on years of healthcare consumer marketing data and shows how patients are aligned in five major groups. Each group has preferences that, when applied to messages and message channels, make them far more effective. Healthcare providers can use this information and measure results of communication campaigns in real time, making refinements if those become necessary.

## Patient Bond and COVID-19 Vaccination Confidence

Patient Bond is available to conduct psychographic segmentation studies within companies and organizations to inform Covid-19 vaccination programs. Please contact [Casey@patientbond.com](mailto:Casey@patientbond.com).