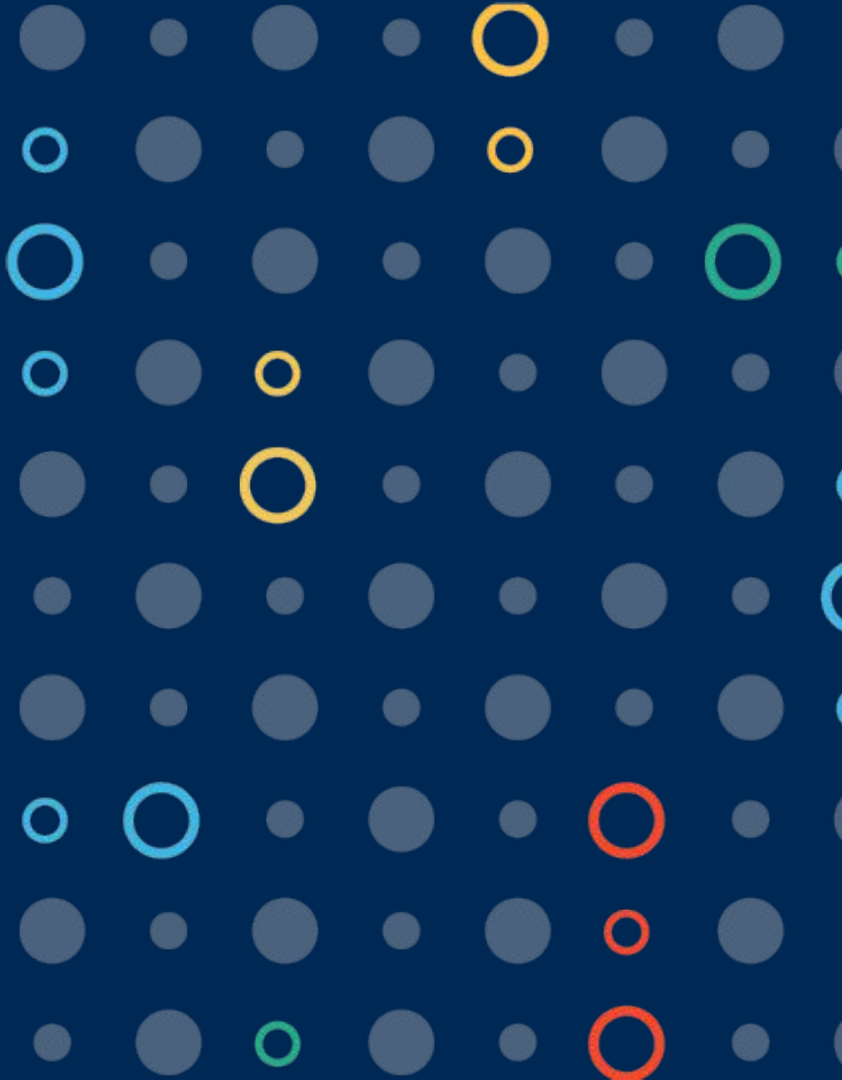


2020 Chronic Care Action Index

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What you'll get out of this report

The 2020 Chronic Care Action Index provides insight into the care experiences of people with complex, chronic health concerns — and why they're utilizing the healthcare system frequently without seeing improved overall health.

A survey of consumers and healthcare professionals in the U.S.* uncovered their perceptions of care and wellness, and the factors that can move people on a path toward better health.

*All figures, unless otherwise stated, are from YouGov Plc. For the consumer survey, total sample size was 2,413 adults, and fieldwork was undertaken between 16th - 20th July 2020. For the healthcare professional (HCP) survey, total sample size was 202, and fieldwork was undertaken between 10th - 20th July 2020. Both surveys were carried out online. The consumer survey figures have been weighted and are representative of all U.S. adults (aged 18+).



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A divide between doctor visits and better results.

Healthcare providers reported they regularly see patients with complex health concerns, but these patients struggle to implement providers' guidance in their day-to-day lives.



Data reveal a disconnect between the doctor's office and patients' homes.

53%

of consumers didn't feel additional steps they can take to improve their health (such as changing diet, exercise, and sleep habits) were **easy to understand** after talking with their doctor.



Medications (39%) and current symptoms (41%) are the areas of health that consumers discussed in the most detail with their doctors during appointments.



Despite it being a key topic during appointments, just **20% and 32% of consumers found it easy to understand the cost and side effects** of their medications after speaking with their doctor.

For people with multiple chronic conditions, “more face time” isn’t the answer.

47%

of healthcare providers reported **more than half of their patients** are managing 2+ chronic health conditions/concerns

56%

of HCPs have seen those patients at least bi-monthly

76%

... yet more than **3 in 4 people with multiple chronic conditions** report their health hasn't improved in the past year, compared with just 12% of people with no chronic conditions



Barriers to improved outcomes, and their effect.

We examined what outside variables might be impacting consumers' ability to make positive health choices outside the doctor's office.

Respondents were divided on what might impact them most — but all were clear on the work-related benefits of getting better.

Consumers report three key areas where they're struggling to make change.

The changes consumers **most want** to make in relation to their health, but find **most difficult** to make:

MORE SLEEP

HEALTHIER EATING

MORE EXERCISE



38%

MORE SLEEP



40%

**HEALTHIER
EATING**



51%

**MORE
EXERCISE**

What's standing in their way?



FOR PEOPLE MANAGING **MULTIPLE CHRONIC CONDITIONS**, TIME IS NOT THE BIGGEST BARRIER — IT'S MOTIVATION.

Nearly 2 in 5 (38%) said it's hard for them to feel **MOTIVATED** to make the changes their doctor recommends.



That's **more than double** the number (16%) who said they don't have enough time to exercise regularly or prepare healthy meals.



Overall, **26% of consumers** cited cost (of medications, gym memberships, and eating healthier) as a barrier to following their doctor's guidance.

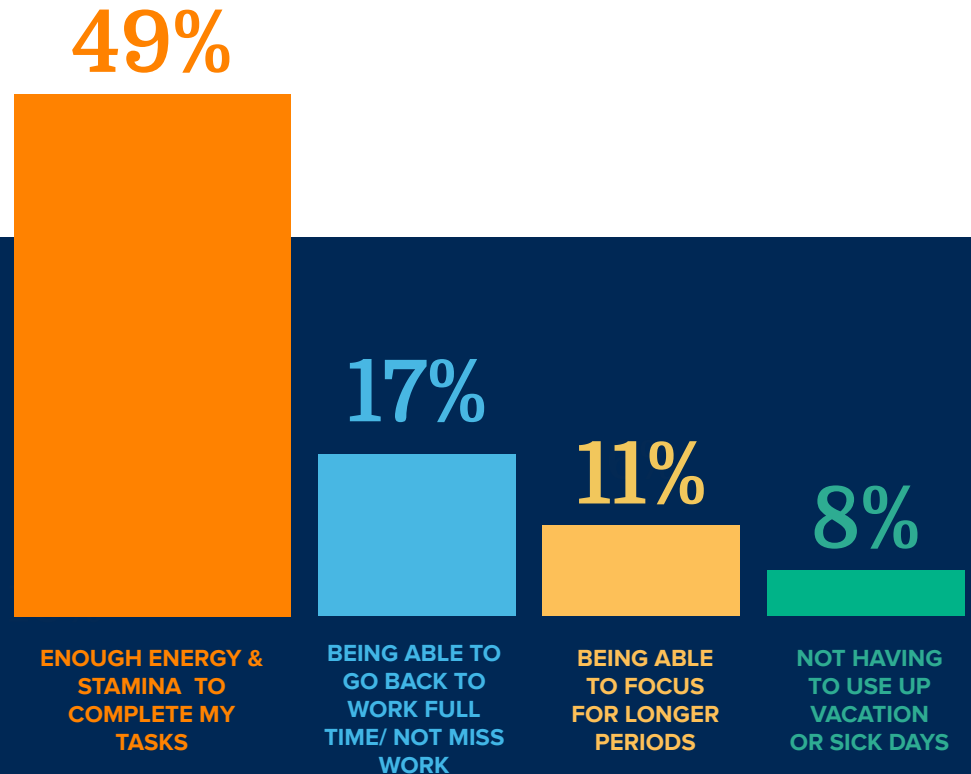
GETTING THE CELEBRITY TREATMENT

If consumers were celebrities with unlimited time and money, **50% said they'd hire a personal chef/nutritionist** to help them get and stay healthy, followed closely by a **personal trainer (42%)** and **full-time staff to clean and maintain their home (39%)**.

Resolving health concerns will positively impact workplaces, too.

3 in 5 people with multiple chronic conditions report their health concern(s) impact their work life.

Among these people, 49% say the **single biggest work-related benefit** of resolving their health concern(s) would be having the stamina to complete their tasks — eclipsing all other outcomes, including not missing time from work and the ability to focus.



Providers weigh in on the impact of COVID-19.

Healthcare providers are concerned about the health of their patients with chronic conditions.

New barriers facing patients outside the doctor's office are making an impact.



Healthcare providers report concern and new obstacles.

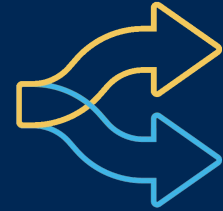


86% of HCPs are concerned that their patients with chronic conditions **have not been getting the care they need** since the start of the COVID-19 pandemic.

83% REPORTED FACING **NEW OBSTACLES TO HELPING THEIR PATIENTS SINCE MARCH 2020:**

58% of HCPs reported **patients' increased stress levels**

43% of HCPs reported not being able to **schedule regular appointments** and **38%** reported not being able to **see patients face to face**



Healthcare providers are **divided** on whether the healthcare system is effectively configured to improve health outcomes for patients with chronic conditions:

- ⇒ **52% somewhat or strongly agreed**
- ⇒ **48% somewhat or strongly disagreed**



Changing needs around sleep and mental health.

COVID-19 has only exacerbated a problem that's been there all along.

In 2020, consumers and healthcare providers alike report an increasing need for guidance around sleep habits and mental health concerns — but their experiences point to a gap in care that's disproportionately impacting those with chronic conditions.

Mental health and sleep weigh heavier on those with chronic conditions.

SINCE MARCH 2020, CONSUMERS REPORT NEW OBSTACLES TO HEALTH:

People with **2+ chronic conditions** report **more obstacles** than those with no chronic conditions.



... AND YET THEY AREN'T DISCUSSING ALL OF THEIR NEEDS:

- 89% of consumers didn't discuss talking to a therapist or mental health professional with their doctor as part of a plan to improve their overall health.
- 79% of consumers didn't discuss getting more/better sleep, and 76% didn't discuss achieving or maintaining a healthy weight
- HCPs agree: When asked about topics they discuss most frequently with their patients, **sleep (33%)** and **mental health (37%)** were among the topics HCPs called out **discussing the least.**

What role is telehealth playing?

While many have pointed to increased adoption of telehealth as a potential solution to care delivery issues, data show that increased access to a physician alone won't solve all health concerns.

In fact, those with the most complex, ongoing health concerns have been early adopters of telehealth — yet still struggle with their health.



For those with chronic conditions, telehealth was already the new normal.

Those with multiple chronic conditions use telehealth services more than the overall population. Out of all consumers:



62% **have not used telehealth services** during the past year



Just 11% report **using telehealth more since the start of the COVID-19 pandemic** (March 2020)



Only **6% of all consumer respondents** said they'd been in touch with their doctor more frequently at all, despite health concerns increasing during the pandemic

EARLY ADOPTERS



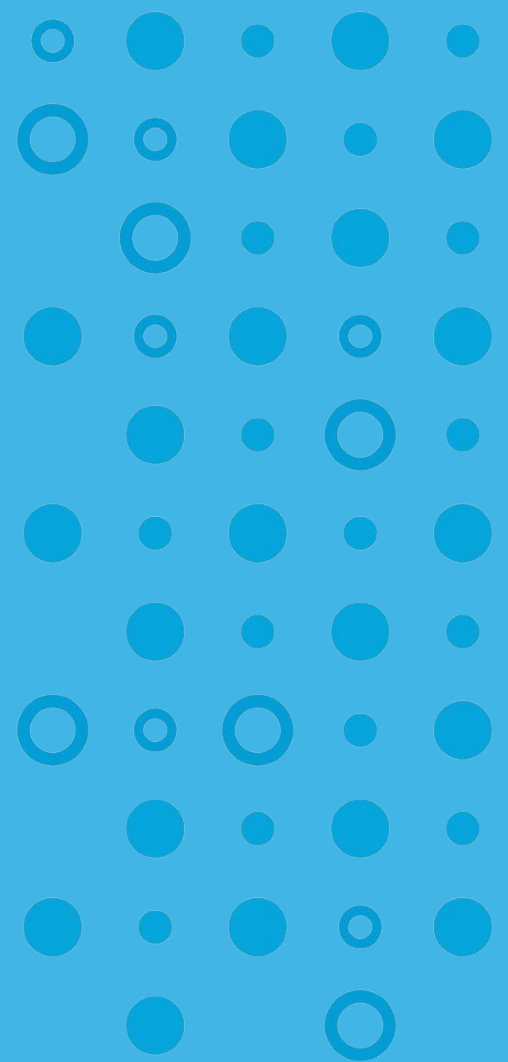
of those with **two or more chronic conditions** have used telehealth services in the past year, while just **23%** of those reporting **no chronic conditions** used telehealth

Moving people on a path to better health.

Increased doctor appointments, or access to a doctor via telehealth, is not the single solution for consumers who continue to grapple with external factors impacting their health. For those with chronic conditions, a high volume of touchpoints with healthcare providers is the norm — and healthcare providers themselves are divided on whether the system is effectively configured to improve health outcomes for patients with chronic conditions. These data examine this problem, and how COVID-19 has made it worse.

People are reporting an increased need for guidance to help identify and address nutrition, fitness, sleep, social, and emotional health issues that are exacerbating health problems. They report a lack of understanding on how to improve their health in these areas, and they don't report any one single barrier preventing them from implementing positive changes outside the doctor's office — but motivation, cost, and limited time are among the most common challenges they face.

The good news? Helping people with complex health concerns move on a path to better health is possible through personalized guidance and support. By identifying the people who are utilizing the healthcare system the most — and helping them connect with the support they need — we can tackle systemic issues head on.



MOBE[®]

MOBE was founded in 2014 by health industry veterans who uncovered a way to use deep data science to identify people whose health care needs (and costs) are going up, but whose health concerns are not resolved.

MOBE combines this deep data science with digital health and a novel one-to-one personalized approach that engages and supports its participants to achieve healthier and happier lives without any additional cost to the health system, employers or insurers.

For more information on MOBE, visit MOBEforlife.com.

