

Living With Chronic Conditions: Healthcare experiences, challenges and opportunities

Consumer Insights Study

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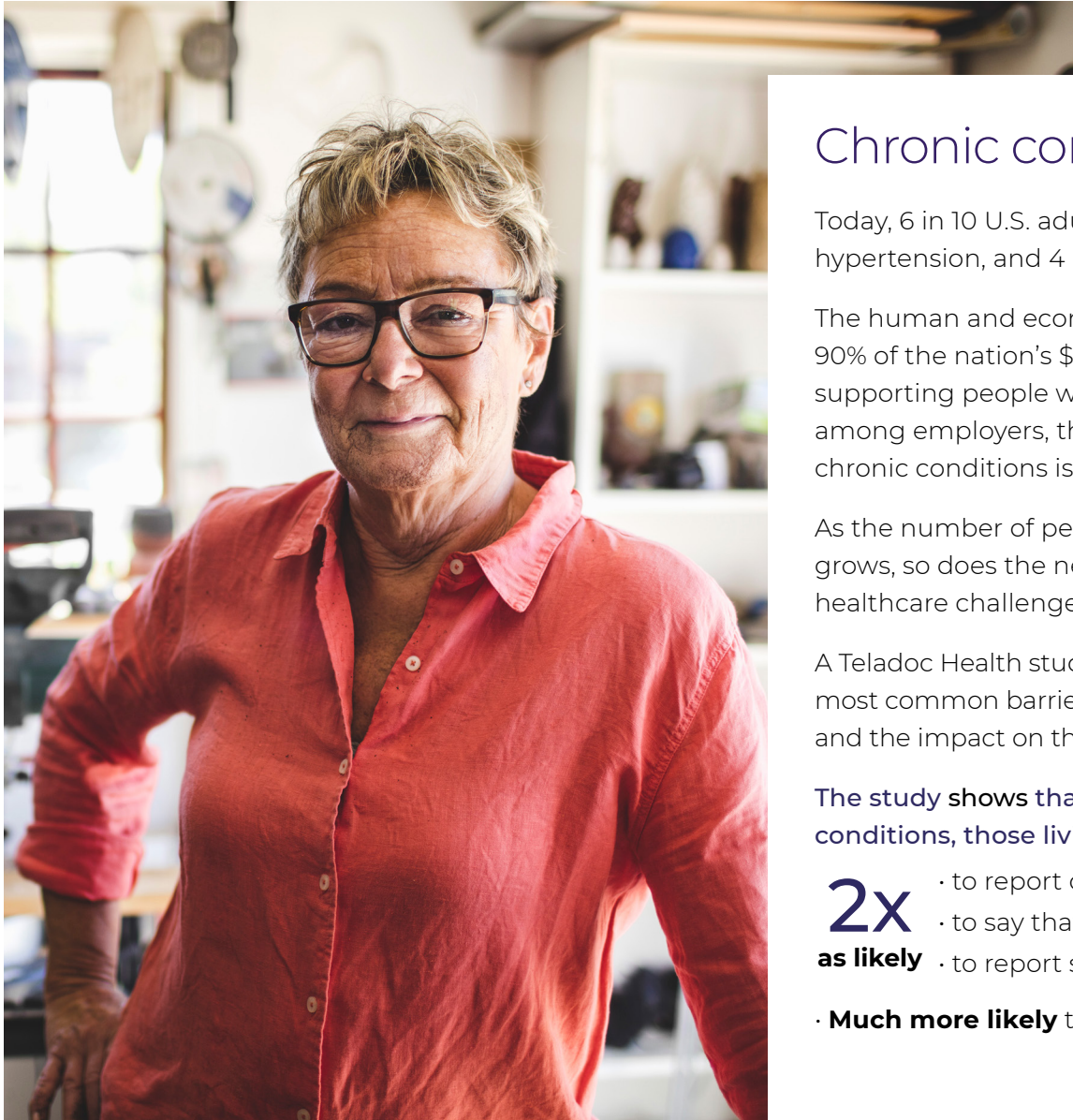
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Chronic conditions do not exist in isolation

Today, 6 in 10 U.S. adults live with a chronic condition such as diabetes or hypertension, and 4 in 10 live with two or more conditions.¹

The human and economic impact of these trends is staggering. In fact, 90% of the nation's \$4.1 trillion annual healthcare expenditure goes toward supporting people with chronic and mental health conditions.² And among employers, the healthcare expenditure on individuals with complex chronic conditions is 12 times higher than it is for healthy individuals.³

As the number of people living with one or more chronic conditions grows, so does the need to understand and address their unique healthcare challenges.

A Teladoc Health study of more than 7,800 people reveals some of the most common barriers faced by consumers living with chronic conditions and the impact on their ability to manage their health.

The study shows that compared with people living without chronic conditions, those living with one or more are:

2x

- to report challenges in managing their healthcare
- to say that getting quality healthcare is "very difficult"

as likely

- to report seeing a mental health specialist*

- **Much more likely** to struggle with food and medication affordability

*Mental health counselor, psychologist, psychiatrist, therapist, etc.

Our study findings provide a deeper understanding of people living with chronic conditions. The research also reveals opportunities to better support these individuals, and underscores the importance of delivering whole-person care to this growing population.

Here are our 5 key findings:

1 The traditional healthcare experience poses **unique challenges for people living with chronic conditions**—especially for those living with more than one.

2 **Virtual care can facilitate care coordination** among doctors and specialists and improve the consumer experience for those living with chronic conditions.

3 **Mental health concerns amplify pain points** for all people, but the impact is greater for those with chronic conditions.

4 Certain **social determinants of health are more prevalent among people with chronic conditions**—negatively affecting their healthcare experience and their ability to manage their care.

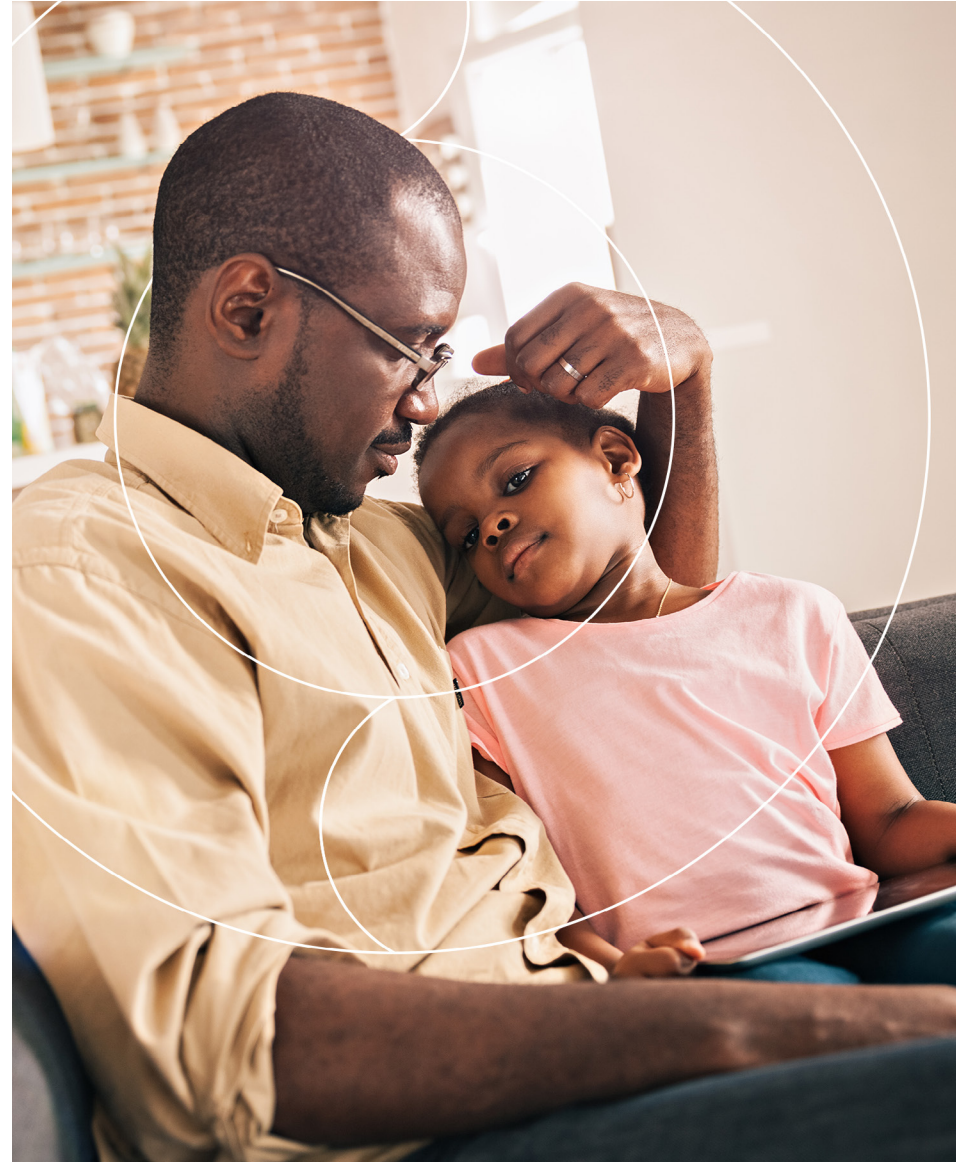
5 **Primary care physicians (PCPs) play a critical role** in chronic condition management and support—especially for those living with multiple conditions.





Healthcare challenges

Living with a chronic condition makes it more challenging to manage healthcare—and these challenges increase with the number of conditions a person has.



Although the COVID pandemic drastically increased the use of virtual care services, the majority of study respondents say they primarily receive in-person care today. But this more traditional way of engaging with the healthcare system presents unique challenges for people living with one or more chronic conditions.

From coordinating care among specialists to juggling multiple care plans, medications, doctor's visits and more—the healthcare experience quickly starts to feel overwhelming.

Chronic conditions impact not only a person's ability to manage healthcare but also their perceived ability to access quality care

People living with multiple chronic conditions are*:

3x

more likely to report
managing healthcare was
extremely challenging

2x

more likely to say that
getting quality healthcare is
very difficult

Having multiple chronic conditions incrementally impacts a person's ability to manage their healthcare



Q: In general, how challenging would you say it is to manage your healthcare?

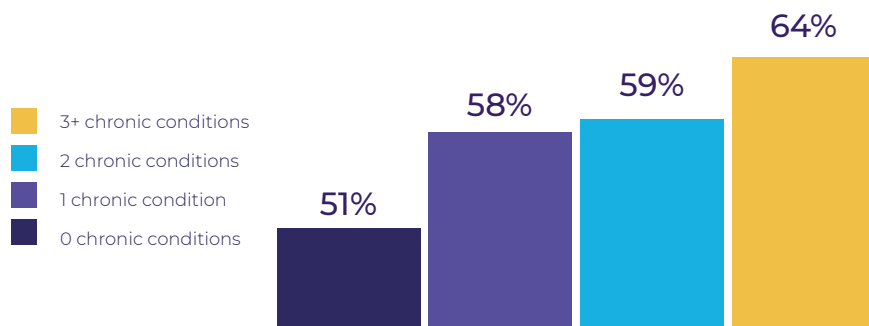
*When compared with those with no chronic conditions



With challenges come opportunities. Our study revealed that although access to a health coach can facilitate care coordination for all populations, it is increasingly valuable for those living with multiple chronic conditions.

**RECOMMENDATION**

Organizations can leverage the ease of virtual and digital tools to facilitate the healthcare experience and reduce care gaps. Providing access to a coach, for example, can provide valuable support to individuals managing chronic conditions.

% respondents who say access to a coach would be helpful

Q: How helpful would it be for you to have access to a coach for times when you are unable to meet with your doctor/specialist?

Solutions that streamline care are especially valuable for consumers living with multiple chronic conditions, who are:

2.5x

more likely to say having access to a coach would be extremely helpful*



Virtual care

Virtual care can facilitate care coordination and improve the consumer experience for those living with chronic conditions

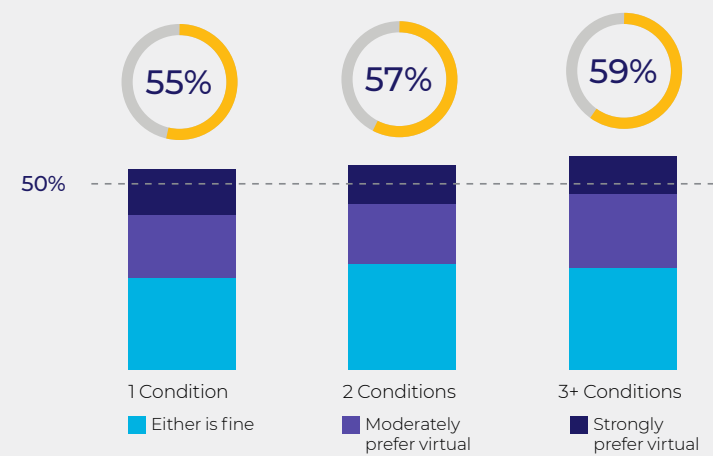




Accelerated by the pandemic, the trend toward virtual care is here to stay. Our study reveals that regardless of their health condition, consumer openness to virtual care and satisfaction with the experience is high.

However, these findings also suggest that as the number of chronic conditions increases, so do the frustrations around care coordination and management—and these consumers increasingly lean toward virtual care as a way to ease those frustrations.

Consumer openness to virtual care is high



In-person vs. virtual preference

Q: In general, when comparing your experiences from in-person visits and virtual visits, which do you prefer?



It is clear that virtual care can provide valuable support to people living with chronic conditions. Consumers today expect solutions that offer virtual care, and want it embedded within their overall healthcare experience.

**RECOMMENDATION**

Chronic condition management delivered through virtual and digital channels can help employers and health plans improve the consumer experience and increase health engagement.

As virtual care becomes a fundamental pillar of healthcare, consider which aspects people find most valuable.

Top reasons for consumer satisfaction with their virtual healthcare experiences

- 1 Eliminated travel time
 - 2 Less likely to be delayed/in the waiting room
 - 3 More motivation to make/attend an appointment
- More meaningful conversation with doctors

Q: In general, when comparing your experiences from in-person visits and virtual visits, which do you prefer?



Mental health

Mental health concerns amplify challenges
for people with chronic conditions

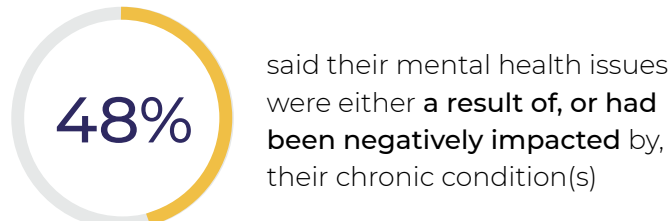
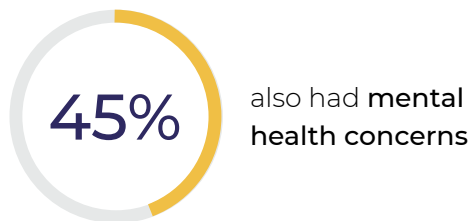


Adding to the complexity of chronic condition management is the fact that people living with chronic illness are at higher risk of developing a mental health condition.⁴

Our findings make it clear that mental health and chronic conditions interact in ways that cannot be disentangled.



Among those living with chronic conditions:



Having a **mental health concern** had the **biggest impact** on whether respondents found it challenging to manage their healthcare

Q: Which of these have you been diagnosed with or received treatment for? / Have you met with a mental health counselor, therapist, psychologist, psychiatrist, etc., in the past year?



But there is a silver lining—respondents with chronic conditions who report the biggest healthcare challenges are also more likely to seek mental health support.

This presents an opportunity to amplify clinical outcomes and improve care for those living with chronic conditions by providing care that addresses both their chronic physical and mental health needs.



RECOMMENDATION

Organizations that take a whole-person approach to chronic condition management can use integrated mental health support as an on-ramp to other forms of care—especially for people struggling to manage their overall health.

Integrated solutions amplify clinical outcomes⁵

Enrolling in a mental health program is the greatest contributor to improved clinical outcomes for members enrolled in Teladoc Health Chronic Condition Management Plus[®]:

▼ 0.5% A1c

average additional A1c reduction over a member's improvement achieved in a diabetes management program alone

▼ 9.6 mmHg

average additional reduction in systolic blood pressure over a member's improvement in a hypertension management program alone

▼ 1.5%

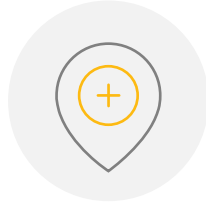
average additional weight loss among members also enrolled in the mental health program

People with chronic conditions are

2x

as likely to have sought mental health support in the last year*

* When compared with those living with no chronic conditions



Social determinants of health

Social determinants of health disproportionately impact people with chronic conditions



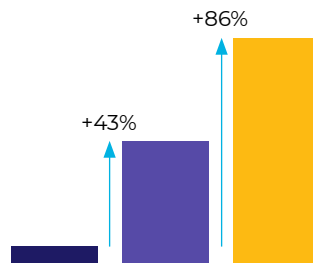
People want to live their healthiest lives, but for many populations, the realities of life—like economic and social challenges—can get in the way. Understanding how social determinants of health (SDOH) impact a person's ability to seek and receive quality care for their chronic conditions is the first step in addressing those factors.

Among SDOHs, the biggest differences between those living with chronic conditions and those without are struggles with **medication affordability**, **food insecurity** and **stress management**.

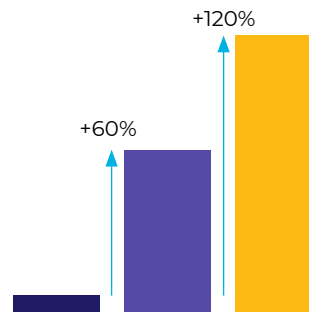


% increase in respondents who report they struggle with medication, food and stress

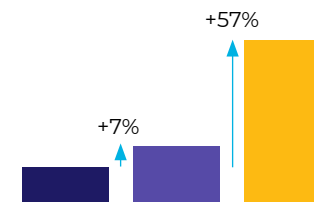
Medication affordability



Food insecurity



Stress management



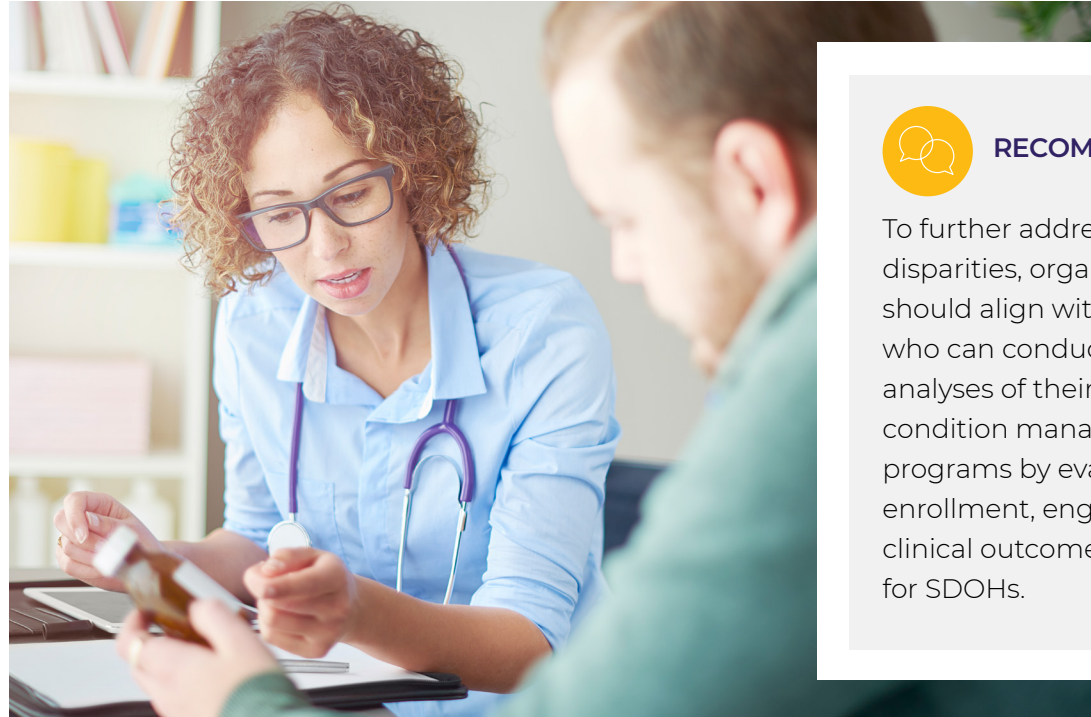
■ 2+ chronic conditions
■ 1 chronic condition
■ 0 chronic conditions

Q: To what extent do you agree or disagree with these statements? "I have enough money to afford the medications I take" / "I have enough money to afford food" / "My stress level is manageable these days"



It's important not only to appreciate the prevalence of these factors across different populations but also to assess which SDOHs have the greatest impact on a person's ability to manage care—especially those with chronic conditions.

Medication affordability is a **top driver** of healthcare challenges for those living with chronic conditions



RECOMMENDATION

To further address health disparities, organizations should align with partners who can conduct equity analyses of their chronic condition management programs by evaluating enrollment, engagement and clinical outcomes to account for SDOHs.

Social determinants of health: Key factors that make it challenging for respondents* to manage their healthcare

Primary Impact

I don't have enough money to afford food
I don't have access to quality healthcare

Secondary Impact

I don't have enough money to afford the medications I take

Tertiary Impact

My health insurance doesn't cover the services I need to be healthy
My stress level is unmanageable these days

Q: In general, how challenging would you say it is to manage your healthcare? Key Driver Model: dependent variable



Primary care physician relationships

PCPs play a critical role in chronic condition management
and support

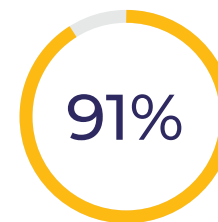




Not surprisingly, survey respondents living with chronic conditions visit their physician more often than their peers do. PCPs can play a critical role in supporting consumers with chronic conditions.

The value of PCP relationships is clear. Virtual care makes it even easier for people to establish and grow these relationships, unconstrained by time and place. With easy access to the right healthcare tools and support, people become more confident in their care decisions and more empowered to improve their overall health and well-being.

Among those with chronic conditions:



visited their PCP more
than once a year



say their PCP's advice is valuable when
making decisions about their health

Q: In the past year, how many visits have you had with a primary care physician? Q: How valuable is your primary care physician's advice when making plans and decisions about your chronic health condition(s)?



Our findings underscore the important role PCPs play in connecting patients to the right care for their overall health and well-being.

As virtual care becomes a fundamental pillar of healthcare, we must continue to consider which aspects of it people find most valuable.



RECOMMENDATION

Organizations can increase consumer engagement by integrating primary care—delivered virtually—into chronic condition management programs to reduce pain points for consumers and support the longitudinal relationships they need to optimally manage chronic conditions.

Having access to a dedicated physician who can help develop treatment plans and coordinate care is ranked as the top feature

Preferred* features in a virtual chronic condition management program



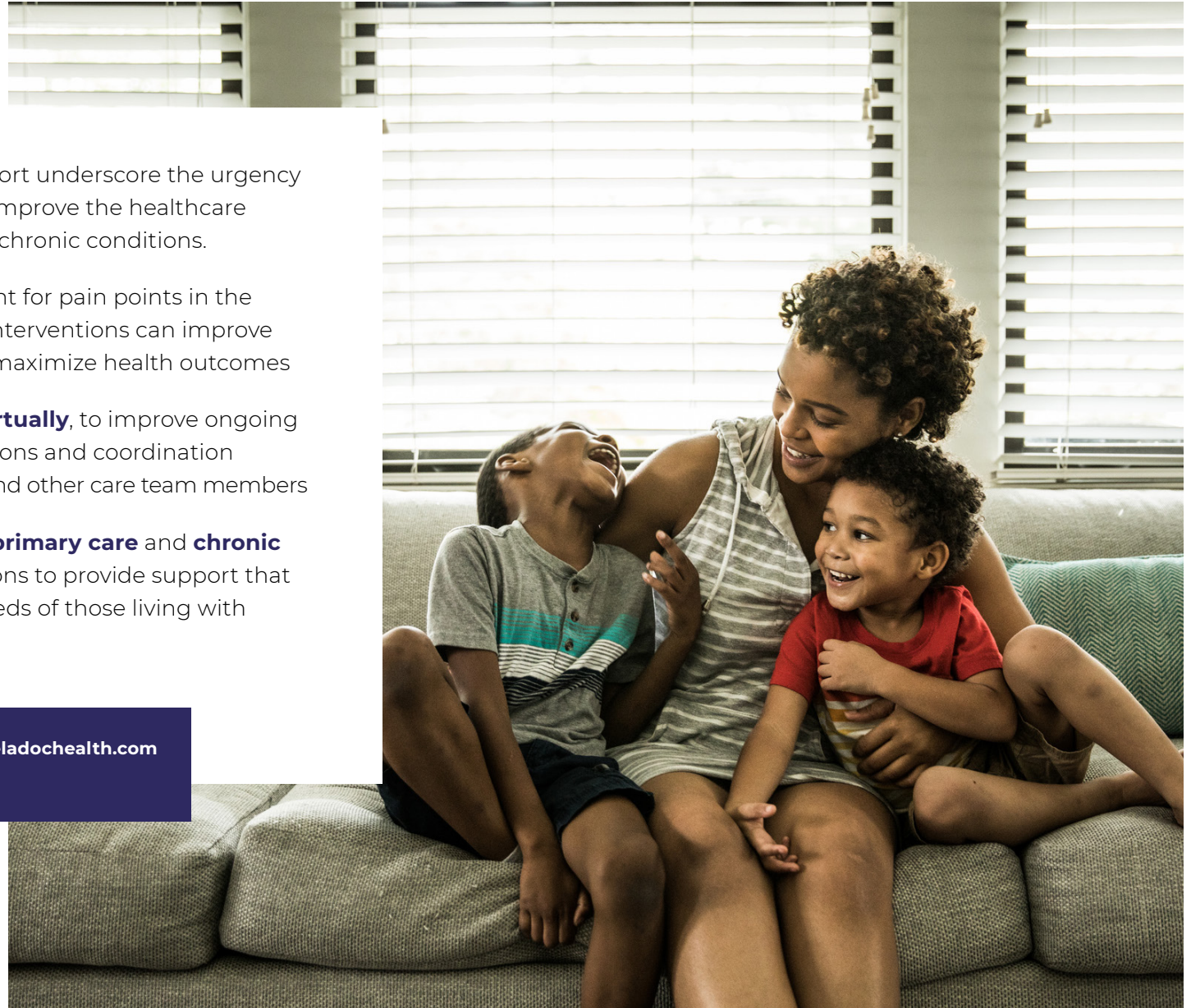
Q: Here are some proposed features of a new virtual chronic condition management program. Which of these features would you find most useful?

Altogether, insights from this report underscore the urgency and responsibility we all have to improve the healthcare experience for people living with chronic conditions.

- **Leverage virtual care** to account for pain points in the patient journey where remote interventions can improve the healthcare experience and maximize health outcomes
- **Use primary care, delivered virtually**, to improve ongoing management of chronic conditions and coordination between physicians, specialists and other care team members
- **Integrate mental healthcare, primary care** and **chronic condition management** solutions to provide support that addresses the whole-person needs of those living with chronic illness

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Learn More: [TeladocHealth.com](https://www.teladochealth.com)

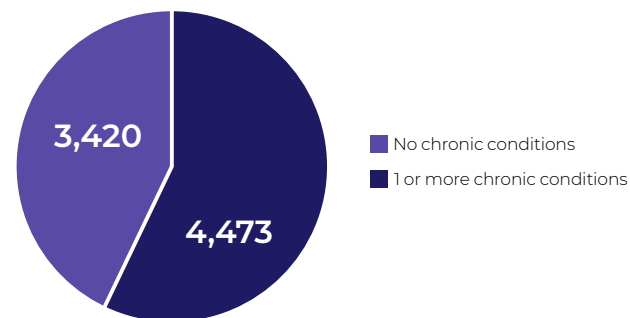


Survey methodology

Teladoc Health surveyed over 7,500 adults to understand how living with chronic conditions shapes their healthcare experience.

Respondents

- 7,893 U.S.-based adults ages 26–70 employed full- or part-time
- 7,688 commercially insured
- 205 Medicare



The 15-minute online survey explored these key topics:

- Healthcare challenges
- Virtual care
- Mental health
- Social determinants of health
- Physician relationships

All of the data in this report (unless otherwise cited) are sourced from our Consumer Insights Study, Teladoc Health, 2022

¹ cdc.gov—Chronic Diseases in America

² cdc.gov—Health & Economic Cost of Chronic Disease

³ pwc.com—Medical cost trend: Behind the numbers 2022

⁴ nimh.nih.gov—Chronic Illness and Mental Health Recognizing and Treating Depression

⁵ teladochealth.com—Multi-program chronic condition solutions amplify outcomes



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About Teladoc Health

Teladoc Health is the global virtual care leader, helping millions of people resolve their healthcare needs with confidence. Together with our clients and partners, we are continually modernizing the healthcare experience and making high-quality healthcare a reality for more people and organizations around the world.