



THE RISING TIDE OF MULTIPLE CHRONIC CONDITIONS

Consumer insights to help you stay ahead of health care cost trends



The health care horizon

Although organizations continue to make substantial progress in managing health care costs, there's a fast-moving tailwind on the horizon: a significant increase in the number of people who are dealing with multiple chronic conditions.

At Optum[®], we have been studying this population as part of our commitment to remain on the forefront of workforce trends. As organizations begin to navigate this complex issue, they'll need a strong partner that can share critical insights and knowledge about this growing consumer segment.

By understanding more about these individuals and how they approach life, work and health care, we can better relate to and serve them. We can help them become more actively engaged in their care — an effort that can lead to improved quality of life and better health outcomes for them, and lower costs and greater productivity for organizations.

Let's get started ...

A handwritten signature in blue ink, appearing to be 'O.B.' with a stylized flourish.

Omar Baker M.D.

Executive Vice President & Chief Medical Officer,
OptumHealth

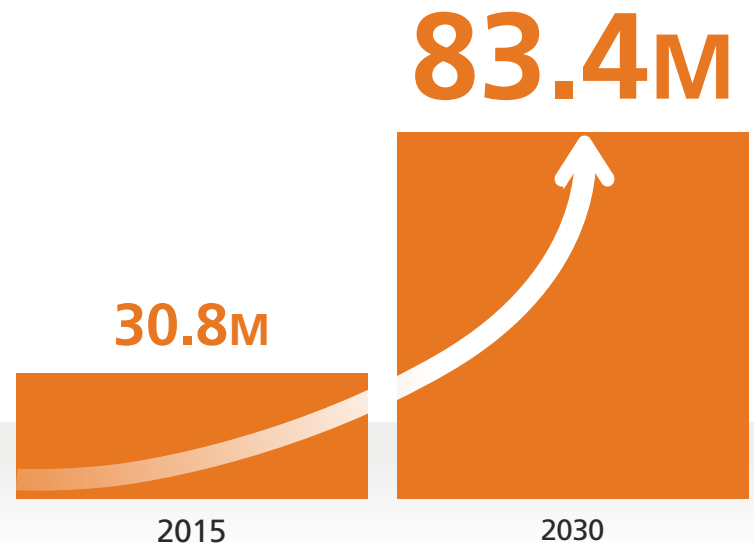
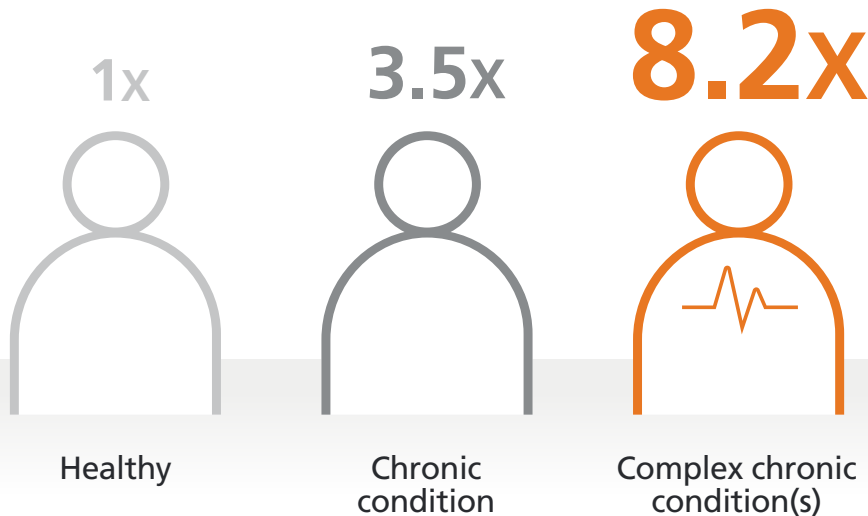
WHY FOCUS ON MULTIPLE CHRONIC CONDITIONS?

People living with chronic conditions spend significantly more on health care than those without chronic conditions. Moreover, this population is expected to grow exponentially over the next several years.

By 2030, an estimated 83.4 million people in the U.S. will have three or more chronic conditions — compared to 30.8 million in 2015.² The rising numbers of people with multiple chronic conditions are likely to make increasing health care costs an even bigger issue for organizations than it is today.

Spending on individuals with multiple chronic conditions is 8x more than for healthy people.¹

The population with multiple chronic conditions is rising exponentially.²



Chronic condition = one condition affecting a single body system.
Complex chronic condition(s) = one or more conditions affecting multiple body systems.

UNDERSTANDING PEOPLE WITH MULTIPLE CHRONIC CONDITIONS

Recognizing the coming wave of individuals with multiple chronic conditions and its impact on the U.S. workforce, Optum used Forrester Analytics Consumer Technographics® survey data to study these consumers and better understand how to engage them in their care.

The Forrester survey was conducted of nearly 48,000 U.S. online adults, of whom more than 7,600 reported three or more chronic conditions. Among those two groups, we compared gender, age, marital status, industry employment, lifestyle behaviors and attitudes, concerns about health care and costs, and use of home-based technology devices.

Forrester's Consumer Technographics Online Benchmark Survey (Part 2), Q1 2019. Base: 47,905 U.S. online adults, 7,647 diagnosed with three or more chronic health conditions. Source for data found on pages 6–17 unless otherwise indicated.

EXAMPLES OF CONDITIONS REPORTED BY SURVEY RESPONDENTS:

Diabetes, cardiovascular disease, cancer, musculoskeletal conditions, chronic kidney disease, gastrointestinal disease

1

DEMOGRAPHICS

Learn before you engage

A growing segment of the population is managing three or more chronic conditions. To engage this group of people — which includes working-age adults — it's important to understand their demographics.



For more insights, visit optum.com/healthcarecosts and optum.com/workforcestrategy

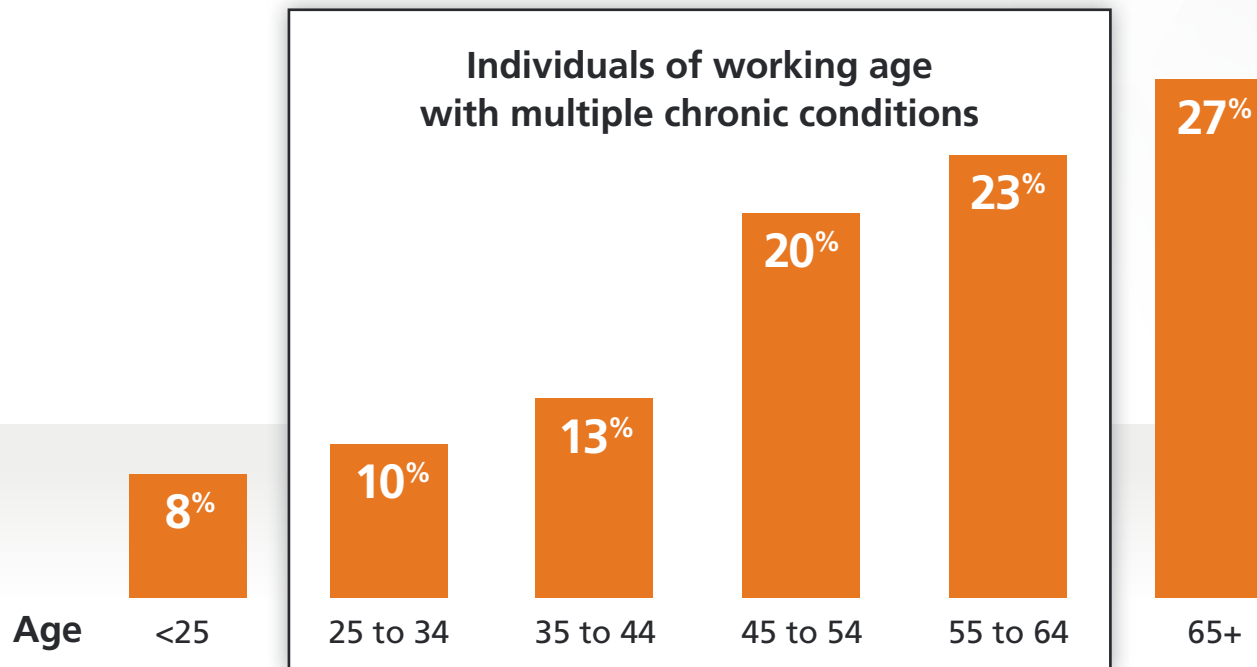


GENDER

When compared to the general population, people with three or more chronic conditions skew slightly female (57% versus 51%).²

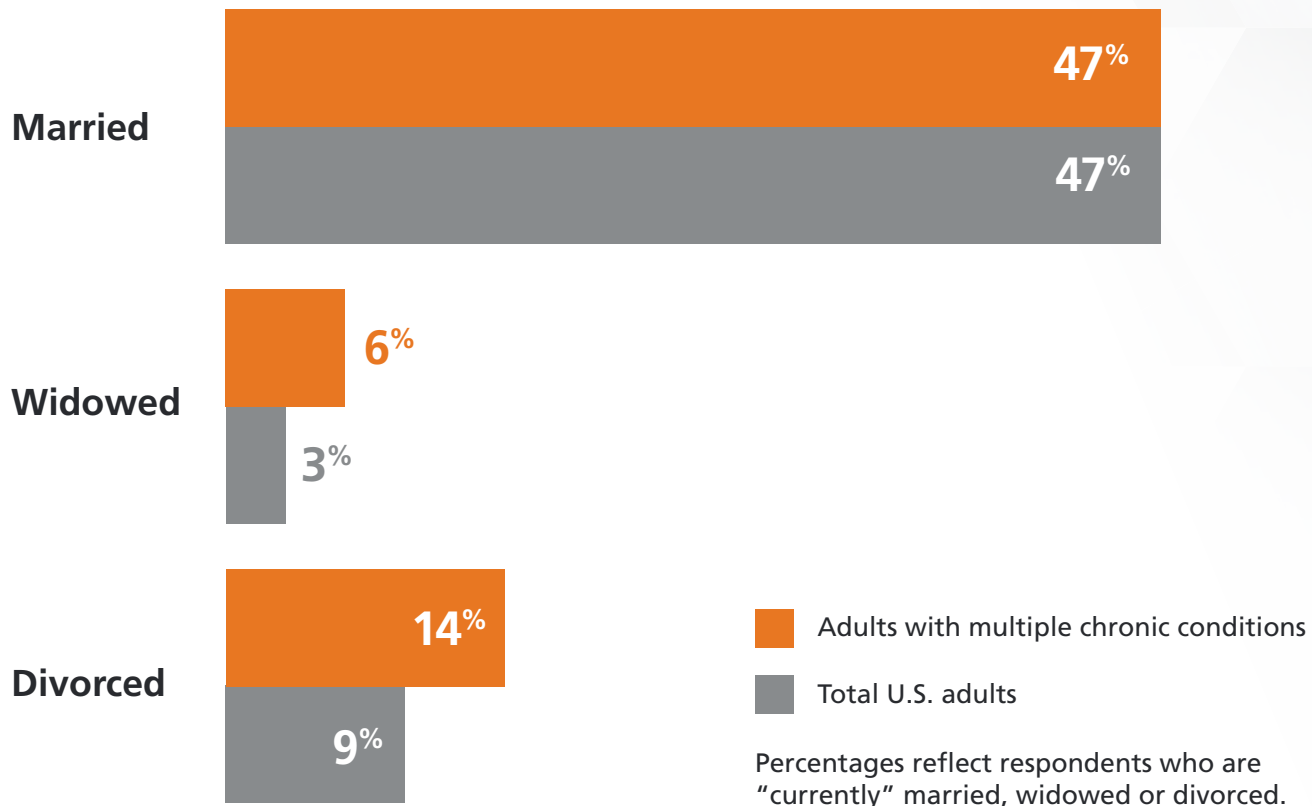
AGE

While over a quarter of respondents age 65 and up have three or more chronic conditions, a major portion of those in the working-age population does as well. In fact, 66% of individuals with multiple chronic conditions are of working age.



MARITAL STATUS

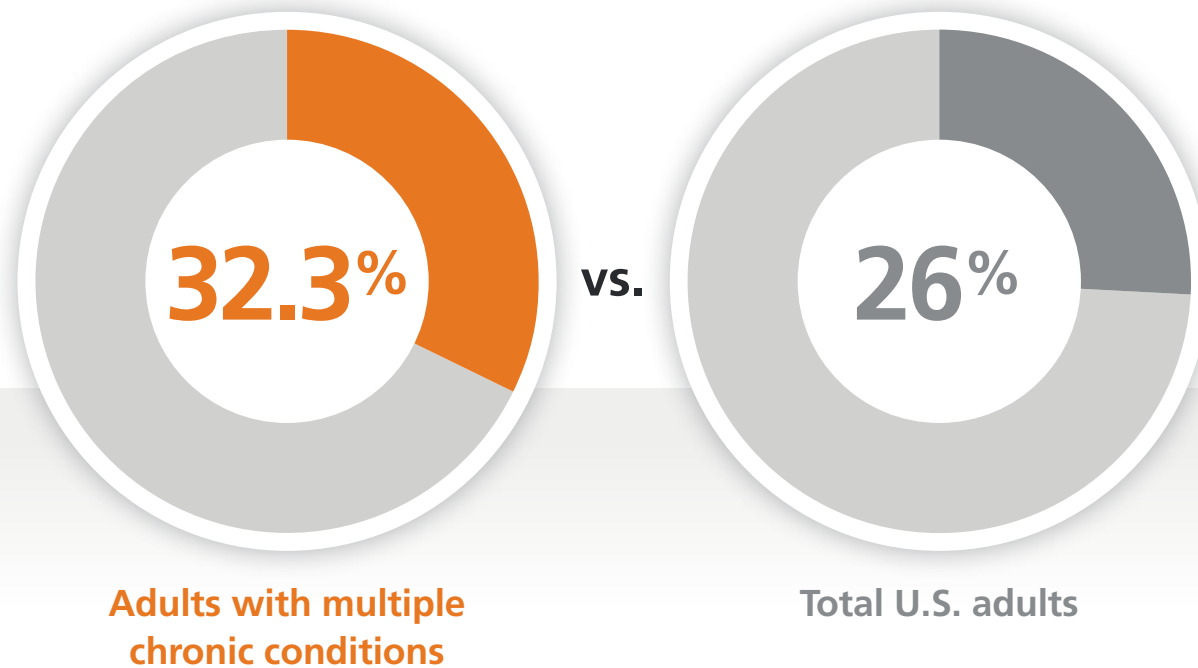
When it comes to marital status, the percentage of married individuals is the same among the general population and the population with multiple chronic conditions. However, the percentage of individuals who are currently divorced is higher among those with multiple chronic conditions. These individuals are also more likely to be widowed, possibly because a substantial percentage are 65 or older.



INDUSTRIES

Of all industries researched, we found the health care, retail and government sectors employ more individuals with multiple chronic conditions. In addition to greater health care costs, employers in these industries may also see a drop in productivity associated with declining health.

Percentage who work in government, health care and retail sectors



INSIGHT ACCELERATOR



Insights from our research show significant demographic differences among people with multiple chronic conditions. In your communications, be mindful of this diversity at each work location.

2

LIFESTYLE

Leveraging lifestyle-driven preferences

Understanding how people with multiple chronic conditions approach life is key to understanding how to build a health care experience that works for them.

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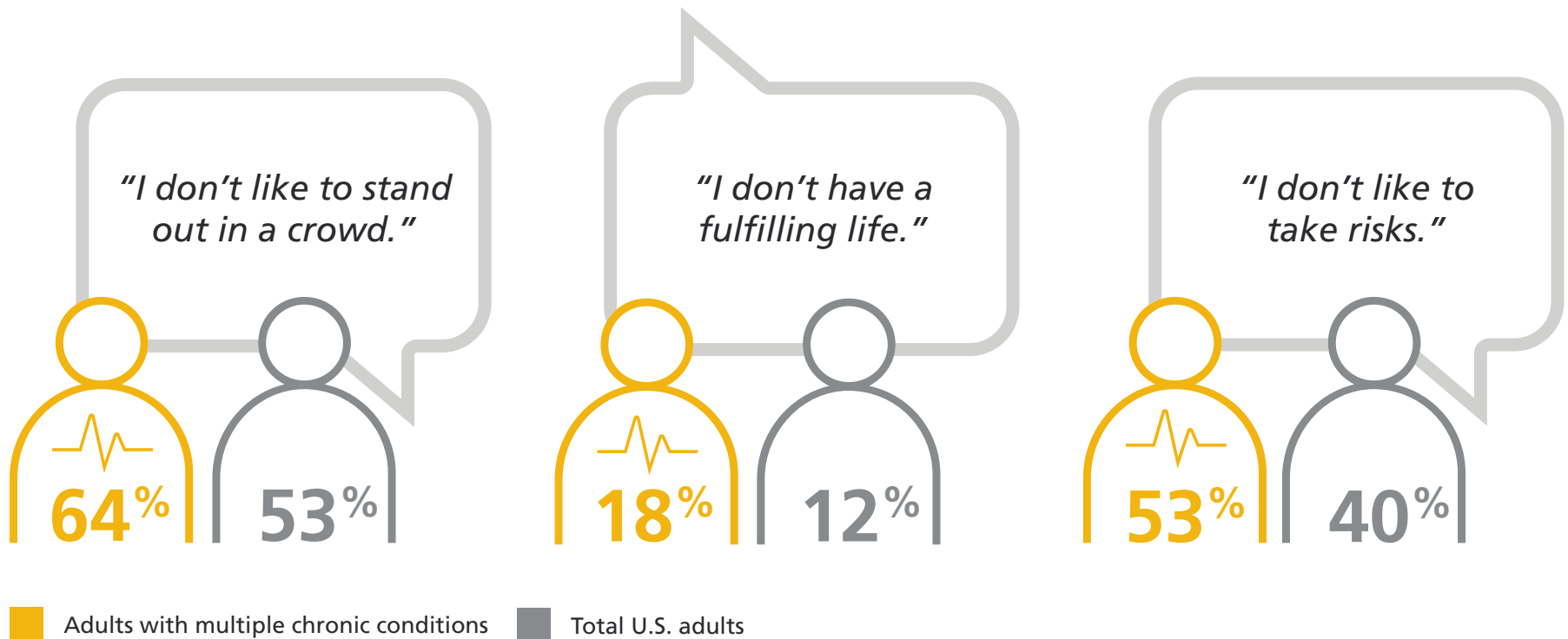
Living with multiple chronic conditions impacts how people approach life. Compared to the general population, they tend to shy away from crowds and avoid taking risks. They are more likely to struggle to feel fulfillment in their daily lives.

INSIGHT ACCELERATOR



Providing additional means of confidential communication and support may help those with multiple chronic conditions engage more fully in their care.

Percentage who agree with these statements



Compared to the general population, people with multiple chronic conditions are more likely to seek out meaningful activities, such as volunteering, visiting museums and galleries, and pursuing arts and crafts. By contrast, their participation in sports, exercise and other outdoor activities is lower than that of the general population. While they may benefit from more physical activity, their chronic conditions may make it more challenging to do so.

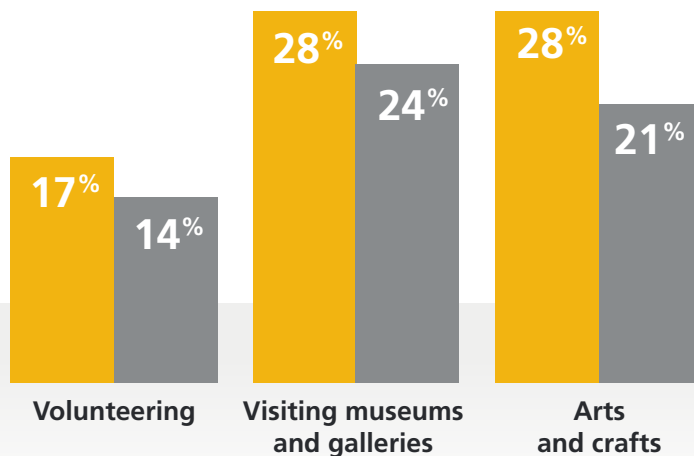
INSIGHT ACCELERATOR



Leverage these insights to suggest creative ways to combine exercise with activities of interest to those with multiple chronic conditions, such as visiting a local museum.

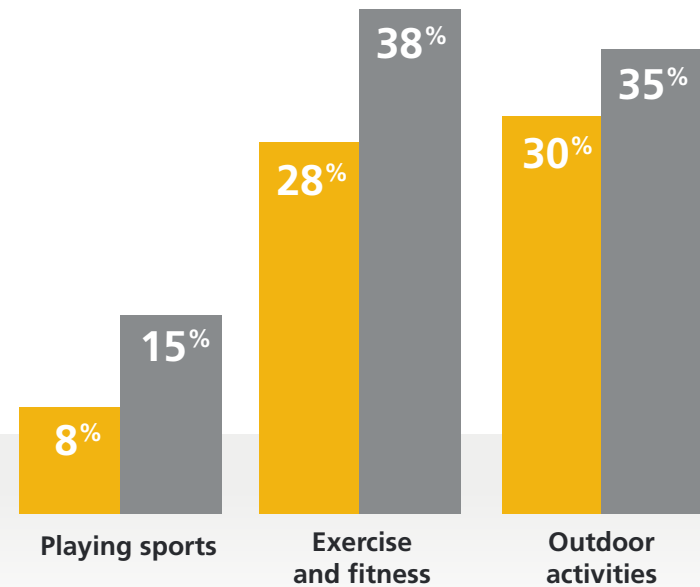
More likely to engage in volunteering, visiting museums, arts

Percentage who participate



Less likely to participate in strenuous activities

Percentage who participate



■ Adults with multiple chronic conditions ■ Total U.S. adults

3

HEALTH CARE ATTITUDES

Opportunities to support and educate

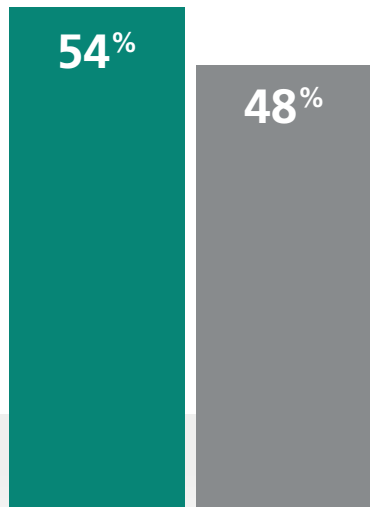
As the number of workers with multiple chronic conditions grows, there's an urgency to ensure we connect them to appropriate benefit resources and help them manage their health care costs without compromising quality and outcomes.



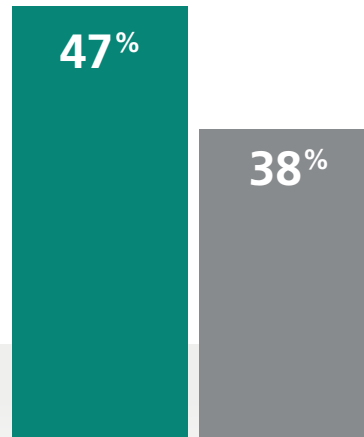
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People with multiple chronic conditions use their health care benefits more than the general population.² This may be why they tend to have a better grasp of their health care services and benefits, including premiums, copays and coverage. However, given the utilization of health care services by this group, it is surprising that approximately half do not understand the health care services and benefits available to them, which points to more opportunities for support.

Percentage reporting they know how their health plan works (e.g., copays and coverage)



Percentage reporting they understand the services and benefits available to them



■ Adults with multiple chronic conditions ■ Total U.S. adults

U.S. adults with multiple chronic conditions

52% are the primary health care decision maker for the household (compared to 42% U.S. adults)

52% are decision makers for health care finances for the household (compared to 43% U.S. adults)

10% are caregivers or health care decision makers for someone with a health condition (compared to 5% U.S. adults)

We also found that those with multiple chronic conditions are:

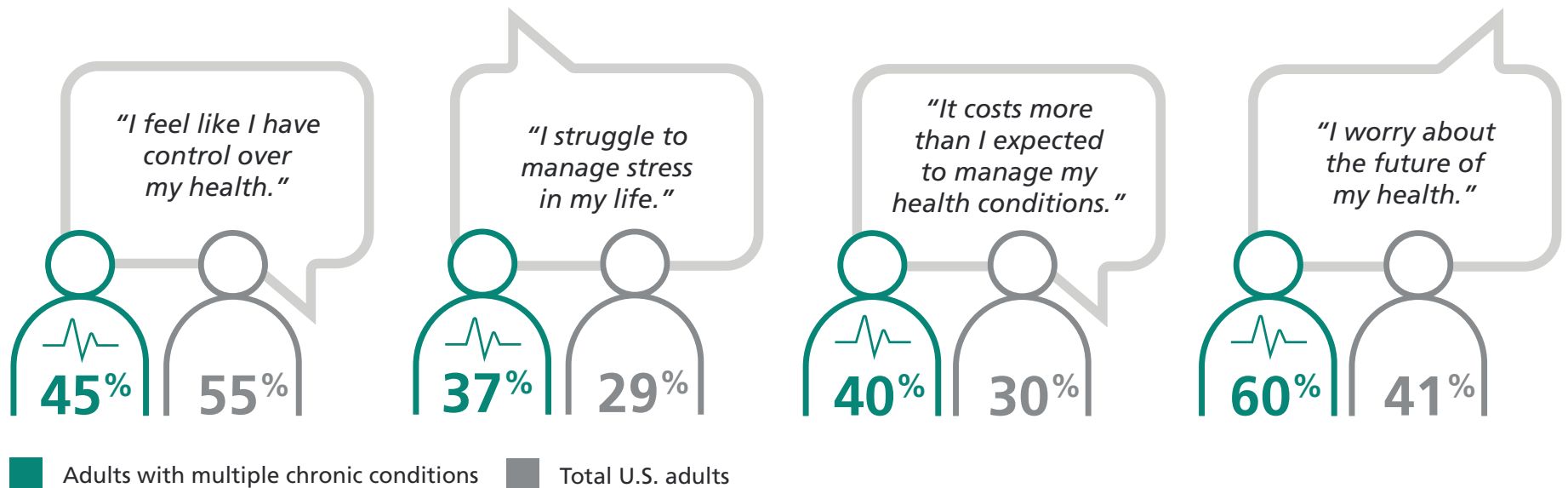
- Less likely to feel like they have control over their health
- More likely to struggle with managing stress
- More likely to feel their health care costs are higher than expected
- Much more likely to worry about the future of their health

INSIGHT ACCELERATOR



Advocacy services can play a key role in guiding individuals with multiple chronic conditions to resources that can help them manage stress, finances and so much more. Talk to your health management vendor for more information.

Percentage who agree with these statements³



4

TECH ADOPTION

A path to better outcomes, lower costs

Technology offers a tangible opportunity to help those with multiple chronic conditions actively engage in their care.

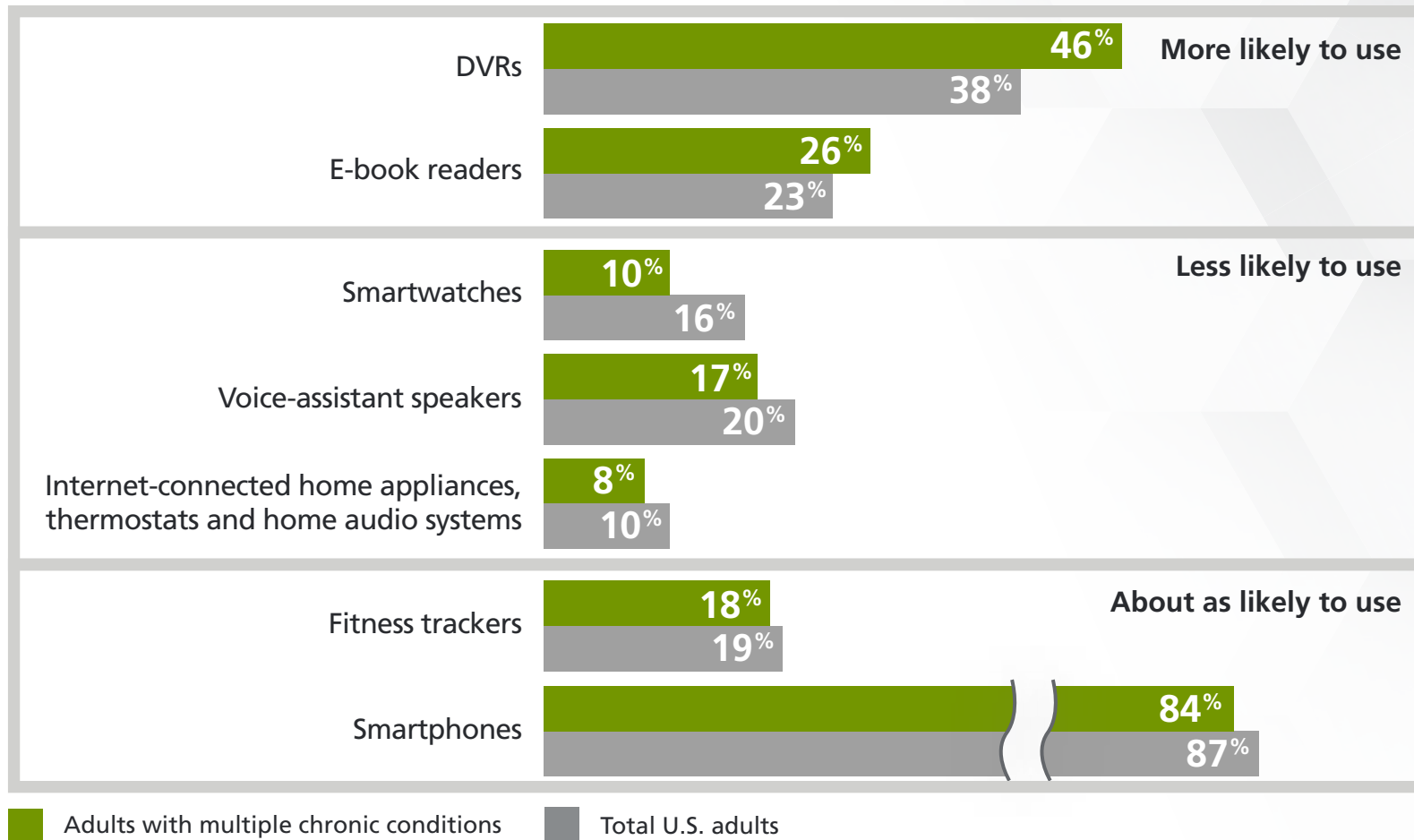


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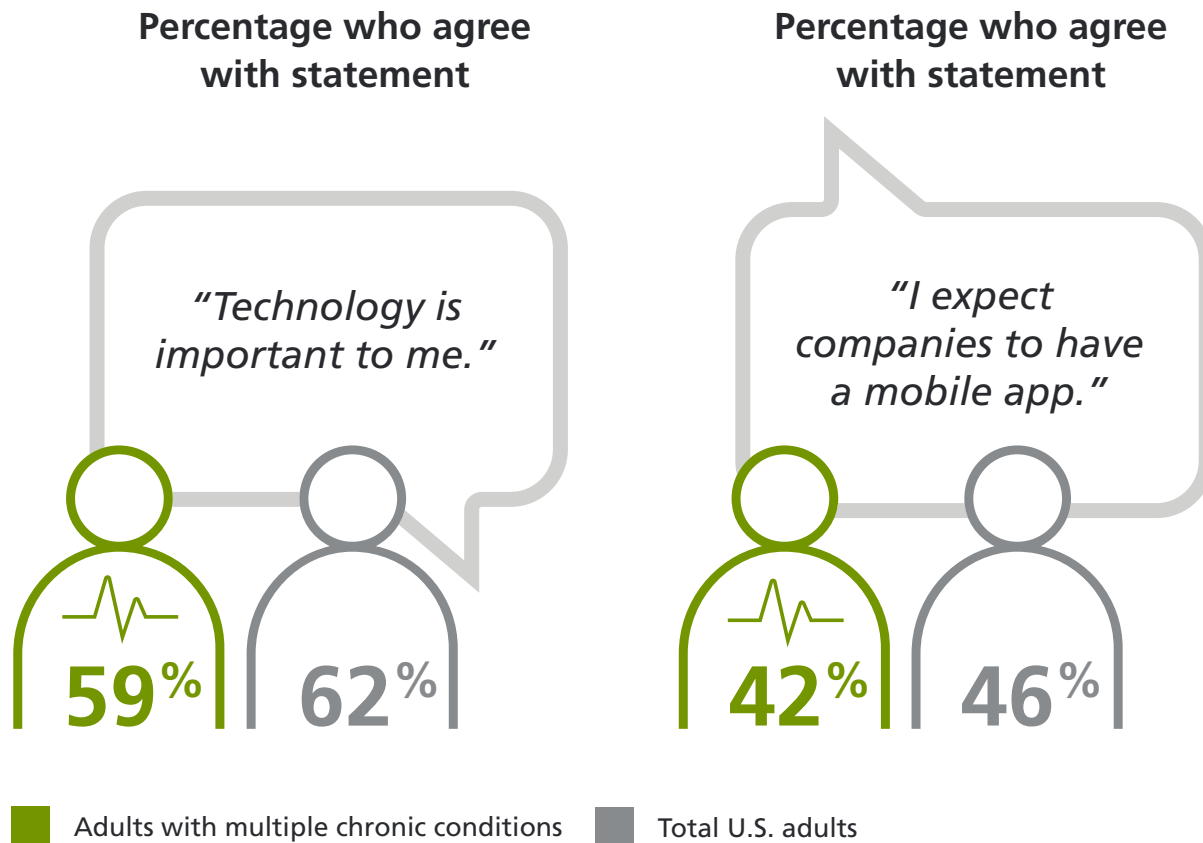


Tech adoption among those with multiple chronic conditions is relatively similar to the general population in many categories, creating opportunities for multi-modal engagement. We find people with multiple chronic conditions are more likely to use DVRs and e-books but less likely to use smartwatches and voice-assisted speakers.

Percentage who use technological devices



While the penetration and adoption of technology is slightly less than that of the U.S. population, the majority of people with multiple chronic conditions say that technology is important to them. This view creates opportunities to leverage mobile technology for clinical and communication support.



INSIGHT ACCELERATOR



Use of at-home, technology-enabled devices by people with multiple chronic conditions is only slightly below that of the general population, and 60% of these individuals agree that technology is important. This creates new opportunities to help manage the needs of this group with remote monitoring devices that can lead to both better outcomes and reduced cost. Connect with vendors who have innovative capabilities to address this need.

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KEY TAKEAWAYS

Keep these points in mind to best engage your population in managing their care:

- Pay attention to the demographics of those with multiple chronic conditions at each work location.
- Provide these individuals opportunities for more confidential support.
- Find creative ways to support physical activity and social engagement.
- Consider advocacy services to help them access important resources.
- Work toward better outcomes and reduced costs by helping people manage their needs with at-home, technology-enabled devices.

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As the health care industry continues to change and adapt to trends in the U.S. population, so too must organizations if they are to support individuals' health and well-being in meaningful ways.

This e-book is only the beginning of a conversation about individuals with multiple chronic conditions and the role they will play in driving future health care spending.

We hope these demographic, attitudinal, lifestyle and technology insights help you more effectively engage this important population, ultimately leading to better outcomes, lower cost of health care, and higher levels of productivity and business performance.

Working with a trusted source that invests in consumer insights can assist you in maximizing engagement among employees. When you need a strong partner to help navigate this growing trend, Optum is ready to help.

For more insights on consumers, check out the "Consumer Mindset" section on our "Health Care Costs" and "Workforce Strategy" digital pages at:



optum.com/healthcarecosts

optum.com/workforcestrategy



SOURCES

¹ PriceWaterhouseCoopers. Medical cost trend: Behind the numbers 2020.

² Craig M. Hales, M.D., Margaret D. Carroll, M.S.P.H., Cheryl D. Fryar, M.S.P.H., and Cynthia L. Ogden, Ph.D. Prevalence of Obesity Among Adults and Youth: United States, 2015–2016. NCHS Data Brief No. 288, October 2017.

³ Forrester's Consumer Technographics Online Benchmark Recontact Omnibus Survey, Q3 2019 (U.S.). Base: 10,270 U.S. online adults, 1,403 diagnosed with three or more chronic health conditions. Forrester fielded a set of proprietary survey questions on behalf of Optum.

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