

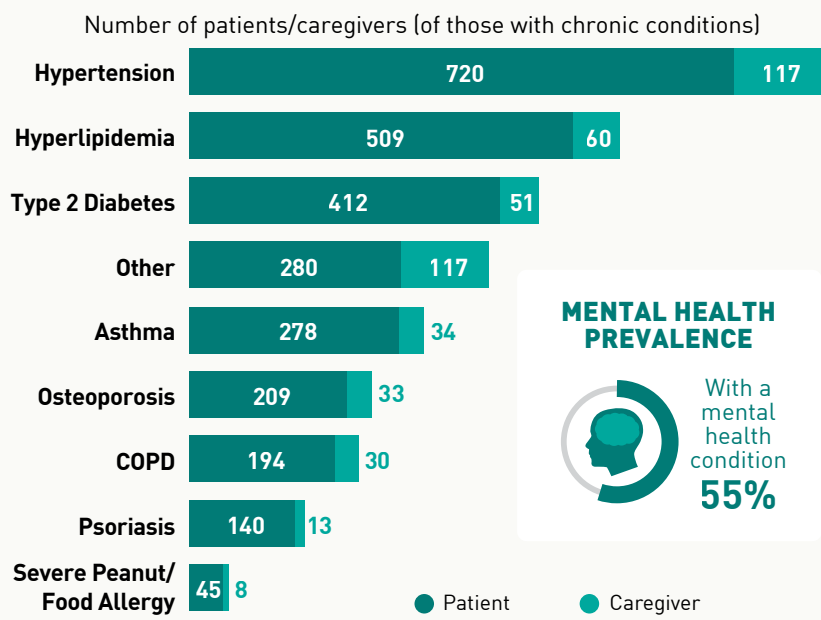
TODAY'S CHRONIC PATIENTS: WHAT WE NEED TO KNOW

For the majority of patients living with chronic conditions, "health" is often focused around treatment and disease control. And while healthy living has historically been associated with longevity, it has evolved to be multidimensional — inclusive of mental and even spiritual health. This expansion of mindset, coupled with rapid technology innovations and adoption, presents an opportunity for more advanced, personalized care, guiding patients towards more optimized outcomes for living a healthier life.

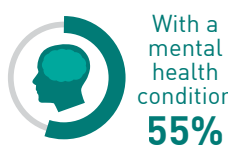


CHRONIC CONDITIONS

Multimorbidity is prominent. Over 50% of chronic patients have been diagnosed with a mental health issue.



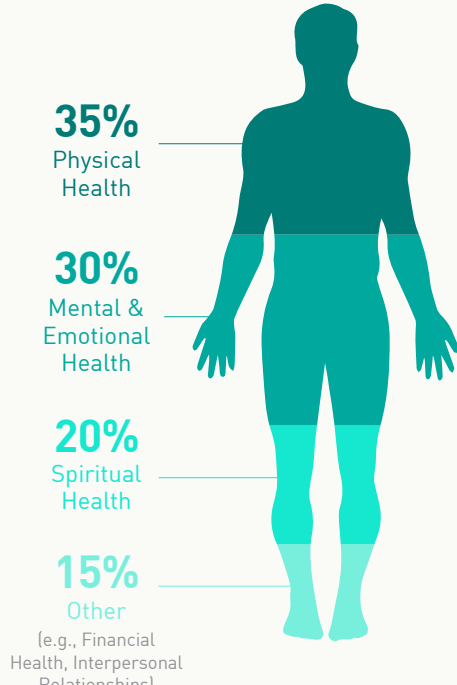
MENTAL HEALTH PREVALENCE



Other includes: Lupus, Hypothyroidism, Migraines, Irritable Bowel Syndrome, Bipolar Disorder, Fibromyalgia, Tinnitus, Arthritis, Gout, etc.
Mental health conditions includes: Anxiety, Depression, PTSD, etc.
Total sample N=1,325 | Patients N=1,107 | Caregivers N=218

WHAT IS HEALTH?

Balanced in all aspects of life — mind, body, and spirit — and a positive sense of well-being.



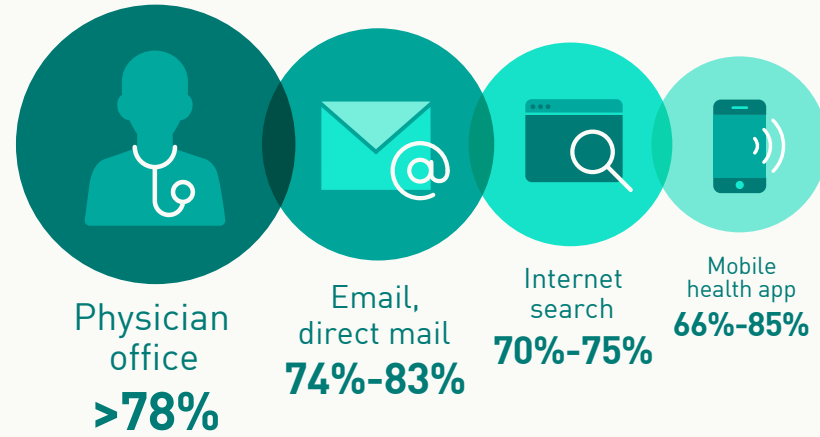
HEALTHCARE ACCESS

While quality care is attainable, affordable care could be challenging — 1 in 4 feel they do not have access to comprehensive health insurance. This is likely driven by social determinants of health, which are economic and social conditions that influence differences in healthcare status.



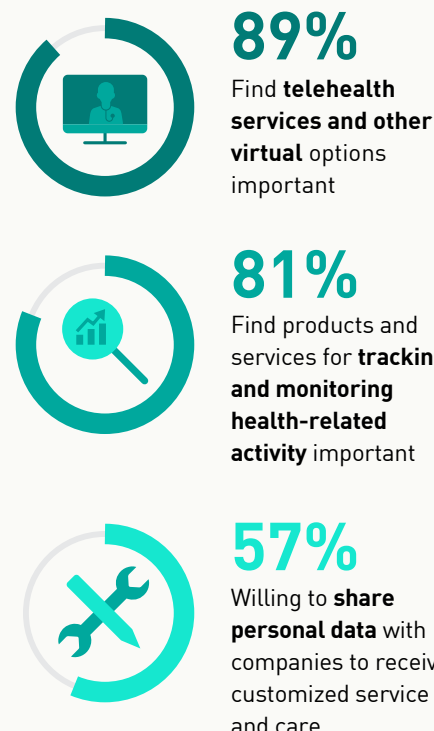
CHANNEL PREFERENCE

A physician's office is the preferred channel as patients become aware of their condition, while online resources and mobile apps help patients measure ongoing progress following diagnosis.



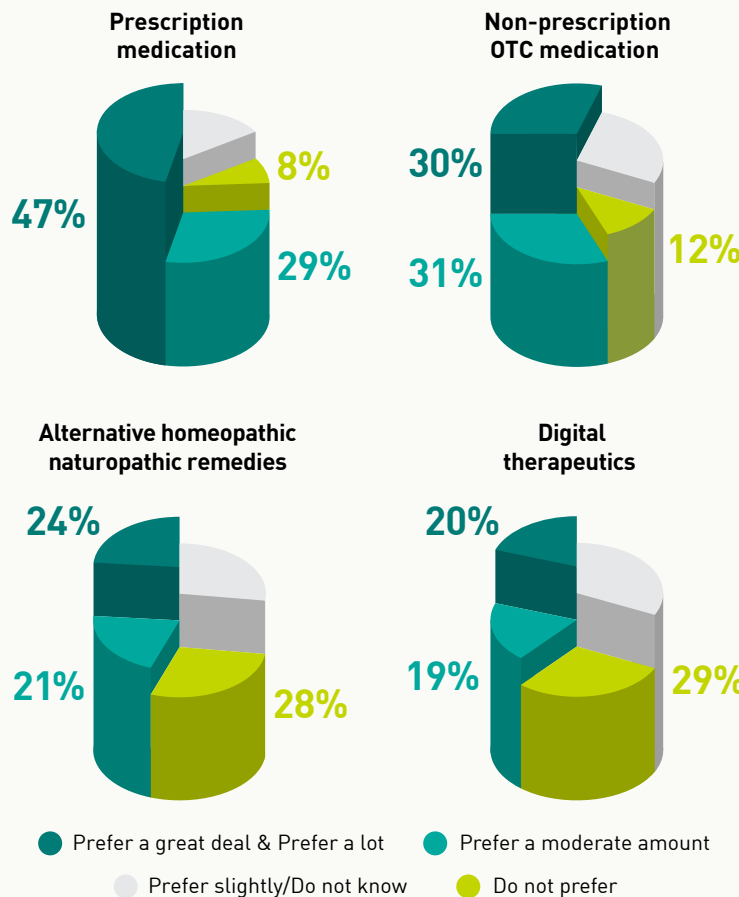
HEALTH TECHNOLOGY AND APPS

Over 80% of patients use products to track their health-related activities and interact with providers, enabling customized and convenient care.



MEDICATION PREFERENCE

Though interest in digital therapeutics and alternative medicine is growing, prescription and over-the-counter medications are preferred by chronic patients.



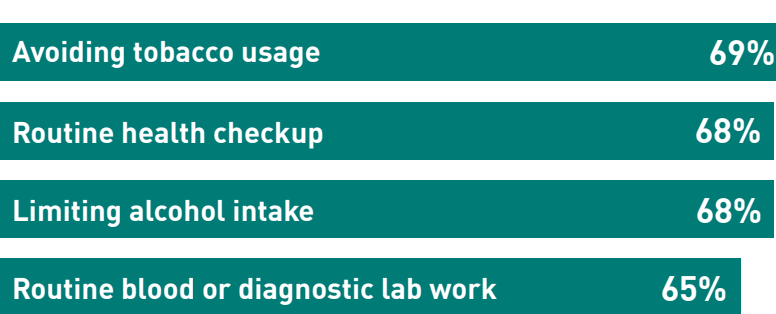
HEALTH AND WELLNESS BEHAVIORS

Immediate-impact behaviors are more ubiquitous than harder-to-adopt habits that can have more lasting effects on health.

RARELY DOING

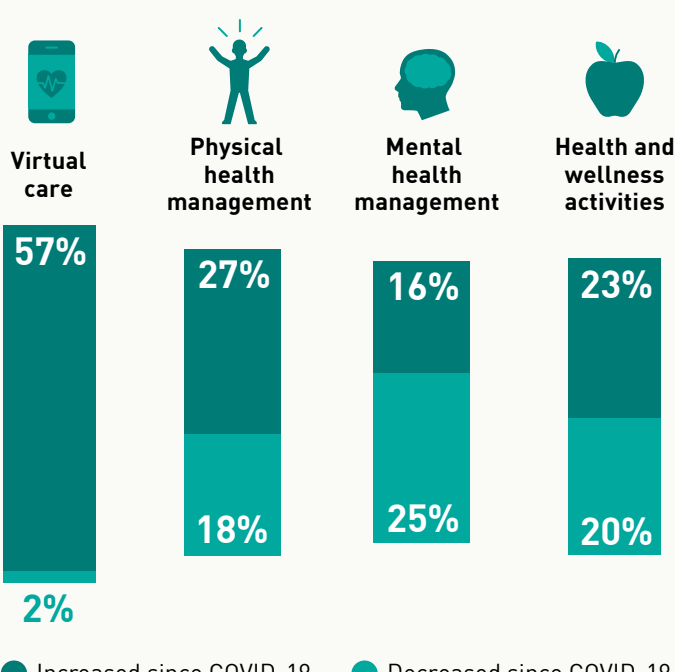


ALWAYS DOING



PANDEMIC-INSPIRED BEHAVIORAL CHANGES

COVID-19 disrupted both access to healthcare and overall approach to health, in some cases signaling lasting change — most notably, a shift towards telehealth and digitization of treatment.



Telehealth visits became a permanent change ... and I am taking care of myself better physically and emotionally (due to the pandemic).

