



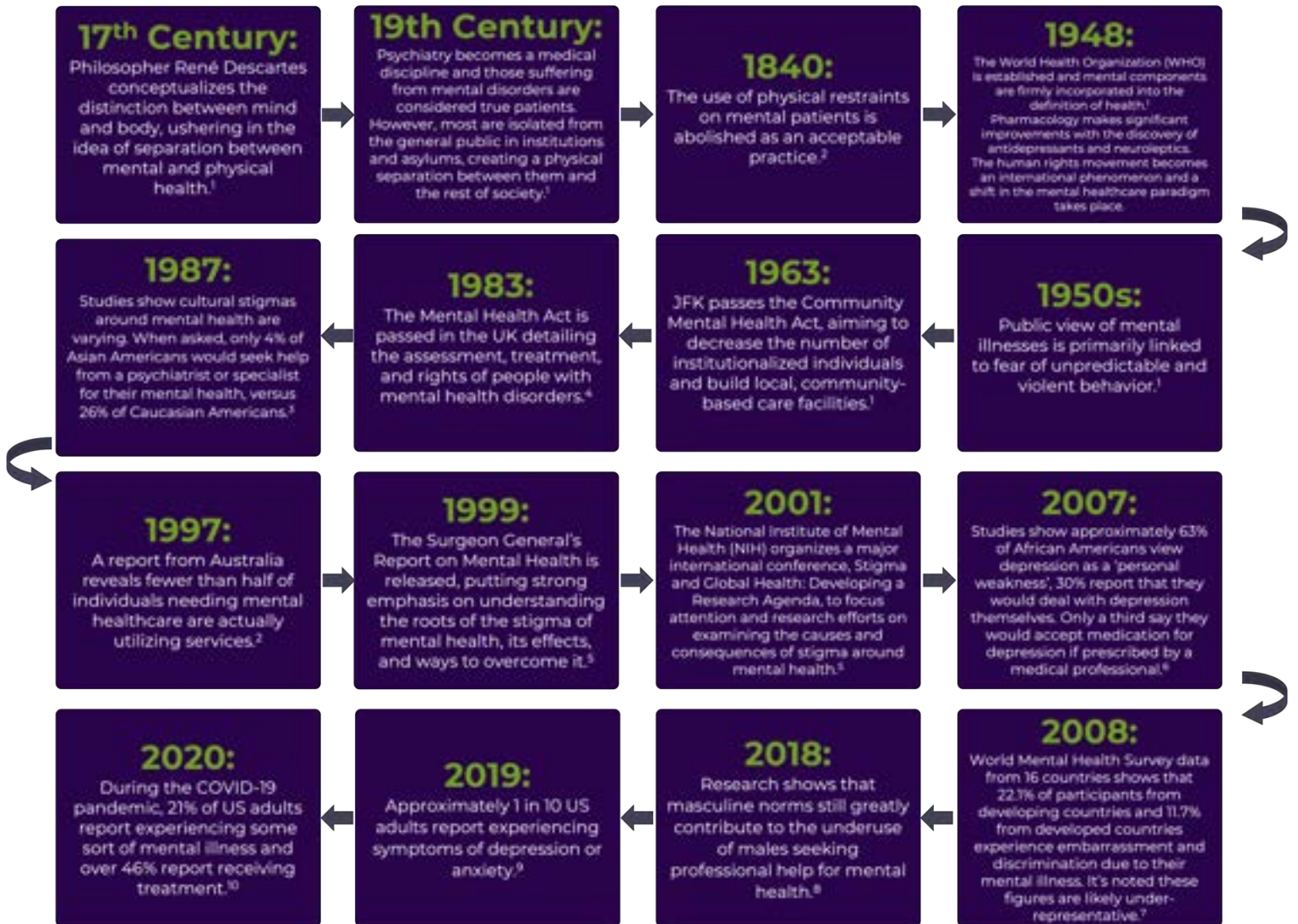
The Mental Health Movement Driving Healthcare Innovation

AUTHORED BY: Lauren Gelles & Bridget Leyden

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MENTAL HEALTH: ONCE A TABOO TOPIC

Mental health has long been a taboo topic, dating back to the early 1600s when science, psychology, and our understanding of the inner workings of the human body were limited. What's surprising is that as knowledge of the human physiology and psyche grew, the stigma around mental illnesses remained.



Our timeline illustrates the complicated viewpoints society has held on mental health and the effects these views have had on those suffering with mental illnesses. But with the onset of the COVID-19 pandemic came a much-needed shift. Mental health and wellness was pushed to the forefront and we're now seeing consumers put more of their focus and spend towards improving their mental health. This is reflected in the exponential growth of the behavioral health market, estimated to be worth \$242 billion by 2027 – a growth rate of over 5% per year.¹⁷ Repercussions from this are being felt throughout healthcare as industry players work to quickly adjust to meet patient needs.

A NEW ERA OF MENTAL HEALTH

The COVID-19 pandemic served as a catalyst for change when it comes to talking about mental health. Since the pandemic, levels of anxiety, depression, and isolation are at an all-time high across the world, and historic societal coping mechanisms, such as escapism, just aren't cutting it anymore.²

“Before the pandemic, I think people viewed personal and internal connection practices as a ‘luxury,’ but now we know them to be a necessity.”

Justin Michael Williams, transformational speaker, meditation teacher, and author.¹¹

In a 2021 survey conducted by the National Alliance on Mental Illness, 52% of respondents said they have been more open with others about their mental health since the pandemic started.¹⁴ Between this new-found openness, sharing on social platforms, more accessible resources, and a society that's becoming increasingly more aware and accepting, the mental health conversation has progressed more than ever before, chipping away at the stigma little by little.

As a result, more and more people are realizing that mental and physical health are very much interconnected, and we can't fully achieve holistic health without both. According to a recent survey, more than 50% of consumers said they want to prioritize mindfulness and mental health more than they did pre-COVID.¹² This is reflected in an increased demand for mindfulness apps, counseling services, and prescription medications.

According to the American Psychological Association, more than 80% of psychologists who treat anxiety disorders say they have seen an increase in demand for anxiety treatment since the start of the pandemic: “These numbers highlight what we have been saying since the early days of the pandemic—we are facing a mental health tsunami. We need to continue to support treatment via telehealth, and we must invest in screening, prevention, and innovative interventions to expand access to various levels of care,” - Arthur C. Evans Jr., PhD, APA's CEO.¹³

As we continue into year three of the pandemic and beyond, it's critical that the healthcare industry keeps pace with this increased demand for mental health support, and they must do so at the consumer's convenience.

IMPACT ON THE HEALTHCARE INDUSTRY

It's no secret that, historically, mental healthcare has taken less precedence than physical healthcare. Between stigma, high out-of-pocket costs due to narrow networks, a shortage of mental health providers, limited access to care, and sociodemographic barriers, it has become increasingly challenging for consumers to find affordable, adequate care. However, as conversations and demand for mental healthcare progress, so must the healthcare industry. We've seen accelerated growth of burgeoning start-ups with a passion for mental health, and legacy contenders eager to meet the new needs of their current consumers.

Integrated Care

Over the past decade, the integration of behavioral health and primary care has been shown to improve patient outcomes, reduce costs, and minimize stigma around mental health. This integrated care concept, known as the Collaborative Care Model, is a systematic approach to the treatment of depression and anxiety in primary care settings. It involves the integration

of care managers and consultant psychiatrists, with primary care physician oversight, with the aim of more proactively managing mental disorders.²²

Collaborative care is focused on connecting a patient's physical and mental health, aligning to the belief in modern healthcare that physical and mental health are undeniably intertwined. By formalizing processes for patient follow-up, guidance, and support, it's hoped that individuals who require mental healthcare won't fall through the cracks or find themselves receiving suboptimal care.¹¹

Today we're seeing the Collaborative Care Model continue to evolve and come to life. For example, as of September 2022, a panel of medical experts (known as the U.S. Preventive Services Task Force) recommended for the first time that doctors screen all adult patients under 65 for anxiety.²⁴

Innovative Partnerships and Expanded Coverage

As mental health needs become more complex, health plans realize that they can't tackle the stigma and access challenges alone. Over the past several years, there has been a growing emphasis on a collaborative ecosystem. Health plans have been partnering with innovative startups and other mental health-focused companies to meet the needs of their populations when and where they need it. These partnerships allow health plans to provide greater access to their beneficiaries, while also enhancing data capabilities to proactively identify patients' needs. A recent example of this in the Philadelphia market is the partnership between Independence Health Group (Independence) and Quartet Health, a technology and services company that quickly connects patients to mental health solutions that fit their preferences, match their clinical needs, and link with the rest of their healthcare experience.²³

Health plans are also addressing mental health challenges through community programs and enhanced plan designs. Beneficiaries can take advantage of complementary social programs and events that promote connection and wellbeing, helping to reduce feelings of isolation and further minimize the stigma around mental health challenges. Also, many plans have also introduced a significantly lower copay for telehealth services (which includes access to behavioral health specialists) and are expanding their networks, increasing access to convenient, affordable care.

Evolving Healthcare Technology

Advances and adoption in technology have opened up new doors when it comes to treating mental health. While healthcare technology has been advancing steadily over the past several years, the pandemic has accelerated technology adoption at an astronomical rate, allowing for new models of care. When the pandemic started, there were significant barriers to delivering virtual care, including a reluctance from patients and heightened regulations. Virtual care was initially treated as a backup plan for in-person treatment, but we've now seen first-hand that virtual care is real care. In fact, telemedicine companies have described a decade's worth of growth in just a few weeks. Prior to 2020, telehealth represented less than 1% of outpatient care. During the pandemic, 40% of outpatient visits relating to mental health were conducted via telehealth.¹⁶

Additionally, virtual therapy applications such as TalkSpace, BetterHelp, and Amwell provide patients with the flexibility to call and video conference with therapists and other counselors on their schedule in the comfort of their own space. These applications are just the first of many to come; the behavioral health software market was projected to reach \$2.31 billion in 2022, growing 14.8% annually, according to a MarketsandMarkets research report.¹⁸

This increased technology adoption has helped to reduce the barriers to care, and has led to lower costs, scalability, and around-the-clock access but also unforeseen obstacles around over-prescribing.

Treatment Innovation

With heightened focus on the need for mental health support, the pharma industry has been eager to fill treatment gaps with new therapies and prescription drugs and break into this booming behavioral health market. Exciting developmental programs

are focused on treating a multitude of previously undertreated disorders including anxiety, schizophrenia, depression, substance abuse, PTSD, brain trauma, bipolar disorder, and neurological conditions.^{5,6} It's hoped that coupling counseling and prescriptions drugs and therapies will allow many individuals to overcome or manage their mental illnesses in ways they weren't previously able to before, enabling them to lead more normal lives.

Transformative treatments are coming in all shapes and sizes, including through the resurgence of psychedelics. The psychedelic market alone is projected to grow at a compound annual rate of 16.3% over the next five years, reaching \$6.85 billion by 2027. This growth is fueled by cutting-edge research of substances once viewed as dangerous. LSD, MDMA, and psilocybin, for example, may benefit individuals with severe mental disorders who have been unable to effectively treat their conditions before.²¹

There is still much research to be done into these new, inventive therapies, but the possibility of effective solutions that are superior to traditional medicines is a massive jump forward in the mental health treatment space.

CONCLUSION

The COVID-19 pandemic exacerbated the mental health crisis, but also shined a light on what we're facing today across the globe. It sparked conversation around the importance of mental wellness, showcased the normalcy of mental health struggles, highlighted the inequity in mental healthcare, and overall, the need for change.

It's an exciting and rapidly changing landscape in the healthcare industry, with the patient-led push for mental health services and therapies that support patients' current needs and prevent future issues down the line. We're seeing innovation and change reverberate across the healthcare industry in response to this from the growth of integrated care, new partnerships, virtual therapy as the new norm, and an evolving market for treatments.

But there is more work to be done. With fast growth and change comes unexpected consequences. We're seeing overprescribing by telehealth providers, and existing inequities in treatment and support continue to be widespread. The healthcare market must rise to meet these new needs, but in the right way.

Vynamic sees this emerging mental health trend as a necessity to the overall wellness of our society and an exciting opportunity for the healthcare industry to better serve the 'whole person' in whole-person health.

We focus exclusively on the healthcare industry, approaching healthcare as five interwoven sectors, giving you access to our unique perspectives during a time of constant change. Our reimaged approach helps our clients achieve actionable strategy, operational intelligence and a healthy culture – crucial elements for responding to this changing landscape.

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