



Health Care Strategy Insights: Implications of Rising Behavioral Health Demands

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It is widely accepted that the [COVID-19 pandemic has exacerbated mental and behavioral health challenges](#) around the world. Since the beginning of the pandemic, [Americans have struggled with unprecedented feelings](#) of isolation, economic pressure, social unrest, and health concerns leading to an increased need for behavioral health support¹. This steady rise in demand has made it difficult for health care organizations to meet the needs of both the populations they serve and their own employees. Organizations were forced to exhaust available finances and staff resources to manage and cope with the pandemic, leaving limited resources to support growing behavioral health needs.

Increased demand due to the pandemic and robust forecasted market growth (global behavioral health market size is expected to grow at a 5% CAGR and surpass \$240B by 2027)² is making way for new behavioral health solutions to enter the market. CSOs are now tasked with steering their organization towards the solution which best meets the needs of both their patients and staff. Approaches currently run the gamut- while

some CSOs are championing behavioral health as a pillar of their organizational strategy, others are increasing staff, implementing digital solutions, and redesigning employee resources.

Considerations for CSOs to Meet Growing Behavioral Health Demand

As health care CSOs develop strategies to meet their organization's rising demand for behavioral health needs, they should take following considerations into account:

- **Pathways to care must create meaningful access** – Many consumers face immediate challenges with accessing behavioral health services. Recent federal data shows that amidst increasing rates of depression and anxiety symptoms, access to in-person behavioral health services has dwindled³. This difficulty in finding resources can be attributed to the lack of existing providers; according to the National Alliance of Mental Health, 60% of U.S. counties do not have a single practicing psychiatrist⁴. With these resource limitations, it is even more critical that CSOs strategize around connecting consumers to the right channel for care.
- **Prioritizing Drivers of Health and Equity is critical to care outcomes** -- Diverse populations often have higher rates of mental health disorders, and lower access to mental health care. According to the National Alliance on Mental Illness, 31.7% of mixed/multiracial US adults experience mental illness, compared to 22.2% of white US adults⁵. These issues stem from a multitude of causes including intergenerational trauma and overrepresentation in lower quintiles for measures of social determinants of care⁶. Behavioral health solutions need to expand their focus to encompass addressing factors such as identity, housing, food insecurity, and safety. CSOs should tailor their organization's care delivery to meet individuals' specific needs based on their identities and social determinants of health.
- **Human connection will remain integral** – Pandemic-driven lockdowns and long periods of isolation reinforced the importance of human interaction and social connection. Patients seeking behavioral health support require a trusted provider or program for treatment to be successful. However, finding that correct match between the patient and the right behavioral health provider is often more complex than seeking care for an acute condition. As CSOs work towards expanding behavioral health programs in their organizations, they should prioritize strategies that enable flexibility for provider-patient matching and retain ongoing connection between both parties.

- **Interoperable data will help drive clinical decision making –**
Creating a robust data-sharing environment across providers and health care organizations will allow for proactive identification of behavioral health issues. Similarly, interoperable data will support the sharing of diverse data types to better tailor behavioral health treatments based on a more detailed understanding of a consumer's behavioral health, including insights into a consumer's background, identity, and socioeconomic status.

Current Limitations and Challenges with Digital Behavioral Health Solutions

In response to rising needs, there has been an influx of new digital behavioral health solutions entering the market. CSOs must sift through the solutions to identify the options that will best meet their strategic objectives and serve their customers. Digital solutions can deliver greater access and affordability, but must be evaluated for regulatory compliance, their impact on clinical outcomes, and data security. The World Economic Forum, in collaboration with Deloitte, has created a Global Governance Toolkit for Digital Mental Health to help organizations adopt and incorporate these digital solutions as the prominence of digital solutions continues to grow⁷. Organizations must also consider technology implications, integration into current systems and the workforce demands that any new solution creates.

For example, many digital solutions require clean data to integrate into existing systems. This integration is core to understanding the patient's health and wellness history and to supporting and addressing the patient's behavioral health needs. However, hospital EMR and CRM systems are complex, in turn requiring a significant effort to bring these systems together. A further risk emerges if digital solutions lack proper data integration tools, as it runs the risk of creating gaps in care and in turn may affect patient outcomes.

In addition to challenges associated with digital integration, current digital solutions may not address the full cycle of care and instead focus on getting the consumer in the door by scheduling a virtual appointment. However, behavioral health needs are not an acute condition that can be treated within one virtual visit. If a consumer's virtual behavioral health experience does not provide continued support after the first visit, their care journey will end without successful outcomes. As a result, an innate complexity in behavioral health care exists due to the necessity of multiple (and often many) interactions with an established provider or another allied health professional. Digital solutions that do not address both availability and supply, as well as the more transactional aspects of scheduling visits, may lack viability and instead cause increased strain to already resource-strapped organizations.

Conclusion

The COVID-19 pandemic revealed and amplified the need for better, more accessible behavioral health care. CSOs have a significant role to play in identifying, defining, and helping their organizations to implement solutions that increase access to behavioral health.

Please reach out to David or Olga with any additional questions.



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