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**BREAKTHROUGH
BEHAVIORAL
HEALTH ACCESS
THINK VIRTUAL**

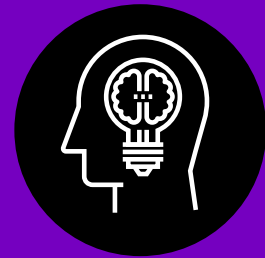


Accenture research reveals latent demand for virtual behavioral health services among US consumers suffering from these disorders. Use of virtual health channels could expand behavioral health treatment access to 53 million Americans.

BEHAVIORAL HEALTH IS A PRIORITY

The statistics tell the story. Behavioral health is of increasing importance in our society. [Nearly 58 million adults in the United States](#) —one in four—and [8 million youth between the ages of 6 and 17](#) have mental health and substance abuse conditions.^{1,2}

[Today's environment is amplifying this crisis](#)³. People are afraid of being infected with COVID-19. They are anxious about record unemployment. They are overwhelmed by widespread social unrest. It's common for times of uncertainty to negatively impact mental well-being. Take the Great Recession, for example. [People who experienced even a single impact were more likely to have struggles with issues like depression and drug use three years after the initial crisis](#).⁴



Behavioral health is the promotion of emotional, social and psychological resilience and well-being and the treatment of mental and substance use disorders.

ACCESS TO CARE IS A SIGNIFICANT BARRIER

Even with so many people experiencing behavioral health disorders today, [only 43% of those adults are receiving treatment for these issues.](#)⁵ There are a myriad of reasons why. The cost of care is often prohibitive. People believe they can handle things on their own. Social stigma keeps them from seeking help. The list goes on.

Access to behavioral healthcare is especially challenging. It is difficult to find a behavioral health clinician, and when one is available, [the average wait time for the first appointment is 25 days.](#)⁶ This is a lifetime for people in crisis. And projections of a [shortage of 250,000 behavioral health and mental health professionals by 2025](#)⁷ suggest that this delay will get worse. Beyond the burden on individuals, the challenges of accessing and delivering behavioral health services have a ripple effect across healthcare. Payers, providers, employers, government and life sciences companies are all impacted differently [\(See infographic\).](#)

VIRTUAL HEALTH CAN SHATTER BARRIERS

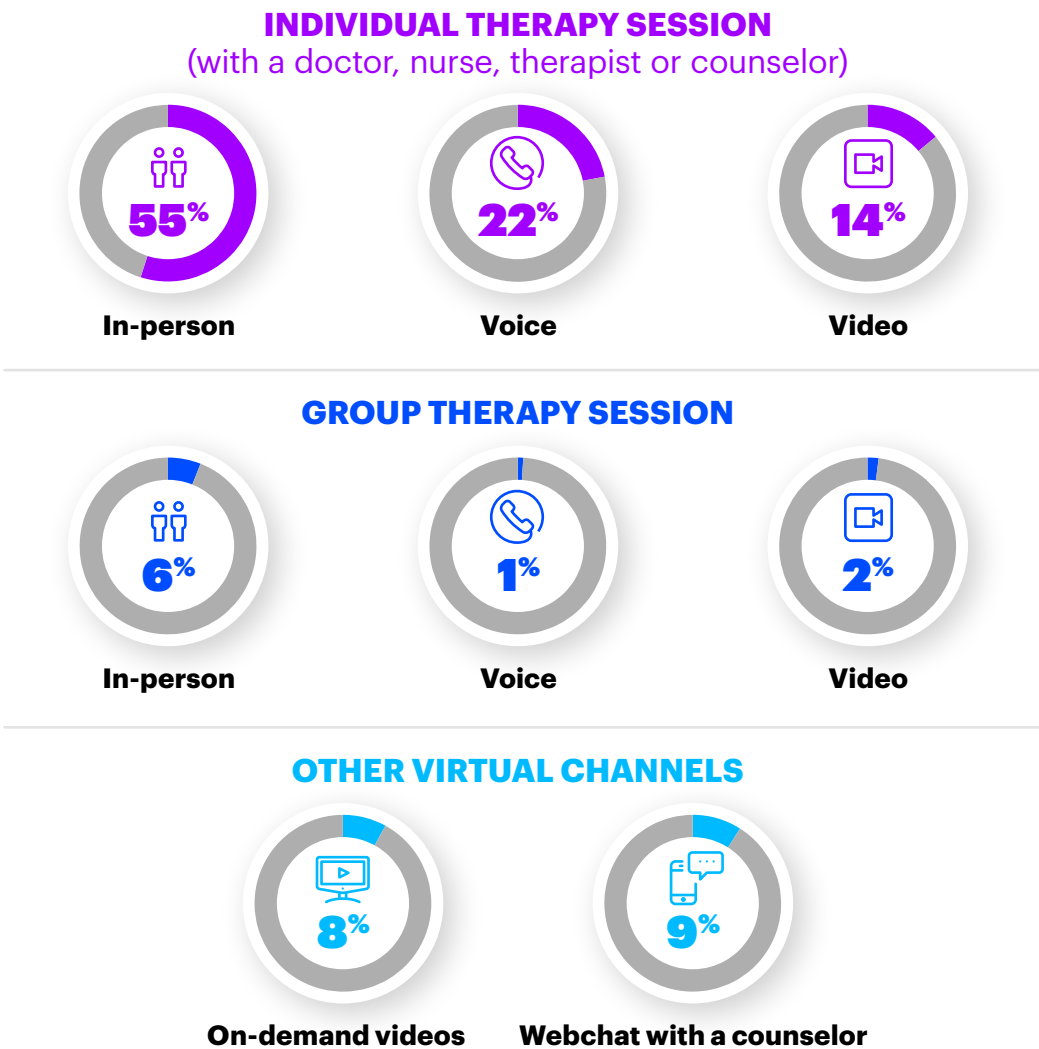
Virtual behavioral healthcare services can eliminate these access issues. They remove geographic, physical and other barriers to free-up clinician time and enable people to self-manage their situation more effectively. But will people use them?

The answer to this question has traditionally been a lukewarm maybe, at best. When asked about behavioral health interactions in the past three years, 55% of US consumers diagnosed with or experiencing a behavioral health condition say they participated in individual, in-person therapy sessions with a doctor, nurse, therapist or counselor.

Thirty-eight percent had engaged in a virtual channel, a majority of which likely occurred during the last few months, as the coronavirus pandemic advanced in the US. Just 22% had these sessions over the phone, and only 14% participated through video chat. Few engaged in virtual group therapy and other virtual channels (Figure 1).⁸

FIGURE 1: Over the last three years, consumers were minimally engaged in virtual channels for behavioral health services

Question: Over the past three years, have you done any of the following to address your mental health condition or addiction? Select all that apply.



Source: Accenture 2020 Behavioral Health Consumer Survey

EVERYTHING CHANGED IN 2020

The role of technology in healthcare's response to COVID-19 is a tipping point for virtual behavioral health services.

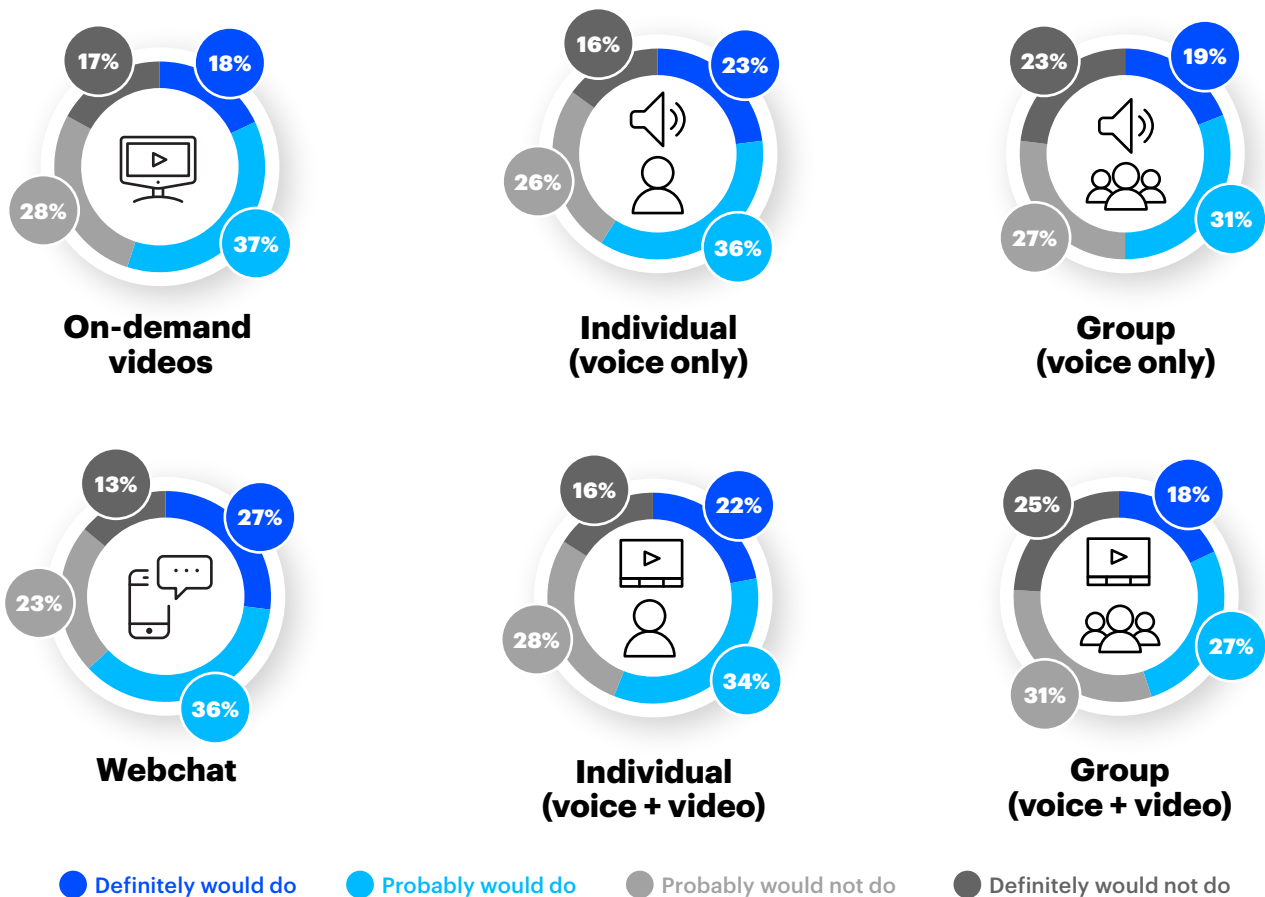
Virtual care models expanded rapidly out of necessity during lockdown, creating new expectations for effective and reliable healthcare at a distance.⁹ This shift likely contributed to the fact that while consumers had not been widely using these services, they are overwhelmingly willing to do so today.¹⁰

Accenture research points to material latent demand in these channels. A full 81% of consumers diagnosed with or experiencing a behavioral health condition “definitely” or “probably” would engage in a virtual channel. Consumer demand varies by channel. Webchat is the most desired channel. Consumers prefer individual therapy options over group, and voice over video, though only marginally (Figure 2).



FIGURE 2: Consumers are open to a variety of virtual health channels for behavioral health services

Question: Which of the following, if any, would you do to better manage your mental health condition or addiction? For this question, you can assume that the payments for these services would be of no cost to you.



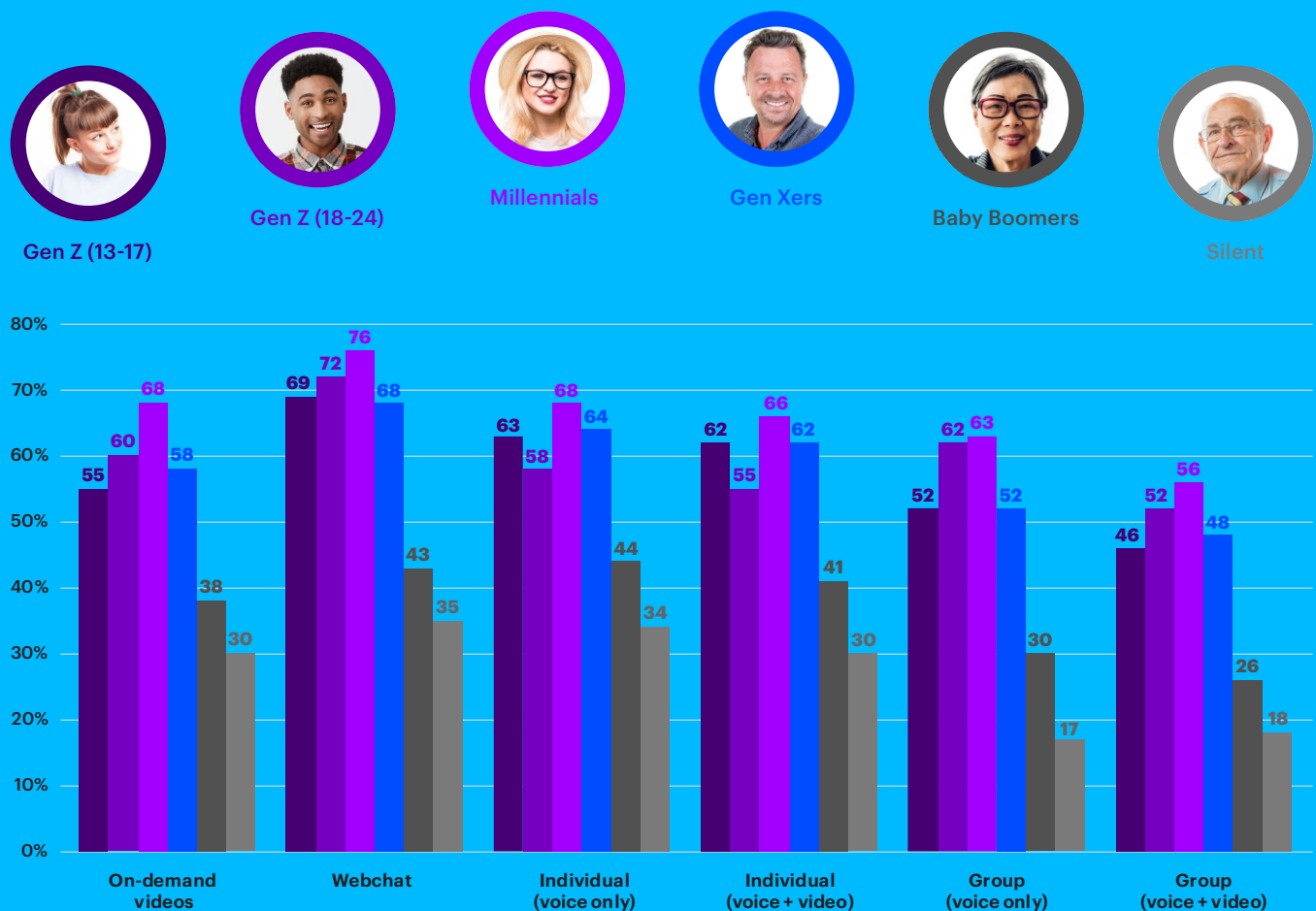
Source: Accenture 2020 Behavioral Health Consumer Survey

For people who are open to using virtual channels for behavioral health services, the biggest draw is that they don't have to leave the house to get care. They also like the option of anonymity (where possible), the chance to use technology and the fact that they don't need any transportation. Not surprisingly, consumers who would not use these services most commonly say it is because they prefer face-to-face interactions.

Younger consumers are especially open to virtual channels

Accenture research shows that younger consumers are much more likely to engage in virtual behavioral health services. This is critical insight for employers as they develop their workforce and talent strategies. [Millennials make up the largest percentage of the US labor force¹¹](#)—and Gen Z is coming right behind them. Prospective employees want assurances that they will be able to address any mental health issues they have through their channels of choice.

Question: Which of the following, if any, would you do to better manage your mental health condition or addiction? For this question, you can assume that the payments for these services would be of no cost to you.



Source: [Accenture 2020 Behavioral Health Consumer Survey](#)

VIRTUAL HEALTH IS A VALUE MULTIPLIER

There are powerful benefits to expanding access to behavioral health services through virtual channels. People can get support to lead healthy, happy and productive lives, contributing to their community in positive ways.

In addition to the effect on people's lives, better access to care is a potential breakthrough in terms of overall outcomes and medical spending. Accenture analysis shows that virtual behavioral health services could materially expand access to treatment for more than 53 million people. This increased access can translate into reduced medical costs. Even a 1% increase in treatment for behavioral health disorders in this country could yield as much as \$2.4 billion in medical cost savings annually in the United States.

These savings largely come from the fact that individuals with behavioral health conditions often have other medical conditions. In fact, 68% of behavioral health patients have a co-occurring medical condition.¹² As a result, [the healthcare system absorbs two to three times more in cost from these patients](#).¹³ In addition, people with behavioral health conditions who get treatment may see up to 30% lower costs than those who do not.¹⁴



FROM TIPPING POINT TO TRANSFORMATION

The case for virtual behavioral health services is clear. There is a great need for these services now. Consumers are ready to adopt them. There is an uptick in investment in innovation in this space. And the possible extension of suspended telehealth restrictions could add to the momentum. As the industry looks to adopt these services, there are three fundamentals to keeping them relevant and responsive to consumers' needs:



CONTROL THE PERSONAL COST

Out-of-pocket cost is the leading factor for people with behavioral health conditions to engage in any virtual channel—44% say that the services must be low or no-cost for them to use them, Accenture research shows. Public and private organizations sponsoring these solutions will need to think through how to lower costs to consumers—particularly those in need.



ORBIT AROUND EXPERIENCE

While consumers are hungry for behavioral health services through virtual channels, the design of the programs and consumers' experiences will make or break adoption no matter the demand. Beyond cost, consumers want convenience and a positive user experience.



MAKE ALL THE CONNECTIONS

Coordination and integration of care with a whole-person approach is critical. Services should be offered in context of individuals' physical health. This is why data sharing and interoperability among different healthcare stakeholders is critical to provide the most effective care.

Americans are facing a very real struggle with mental health and substance abuse issues. Virtual health channels offer exciting options to break through the barriers to access so people get the care they need.

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METHODOLOGY

For the Accenture 2020 Behavioral Health Consumer Survey, Accenture surveyed 3,448 US consumers ages 13 and over to better understand attitudes and behaviors related to virtual health options for treating mental health conditions and substance abuse issues. All survey respondents were either diagnosed with and/or had symptoms related to specific mental health conditions such as anxiety, depression, PTSD, ADD/ADHD, or reported themselves as having addiction issues. Survey respondents received anonymity and represented a cross-section of the population based on age, location, ethnicity, insurance coverage, gender and income. The survey was conducted by Dynata in May and June 2020.

Accenture analyzed the medical cost savings opportunity for increasing treatment of behavioral health services by comparing the average cost differential of those receiving treatment versus those who do not (based on The Impact of Psychological Interventions on Medical Cost Offset: A Meta-analytic Review). The percent difference was then applied to the average per member per month medical and medical prescription costs for a behavioral health patient (based on Milliman Research) and a 1% increase in treatment of the total number of adults impacted by behavioral health issues (based on SAMHSA).

ABOUT ACCENTURE

Accenture is a leading global professional services company, providing a broad range of services in strategy and consulting, interactive, technology and operations, with digital capabilities across all of these services. We combine unmatched experience and specialized capabilities across more than 40 industries — powered by the world's largest network of Advanced Technology and Intelligent Operations centers. With 509,000 people serving clients in more than 120 countries, Accenture brings continuous innovation to help clients improve their performance and create lasting value across their enterprises. Visit us at www.accenture.com

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