



Mental Health Research Report

Consumer experience with mental health services



A new era for mental health services

During the pandemic, more consumers sought out virtual visits for mental health concerns than ever before. As employers and health plans reorganize following the disruption of COVID-19, they are eager to gain a deeper understanding about the full potential of a virtual-first approach to mental health.

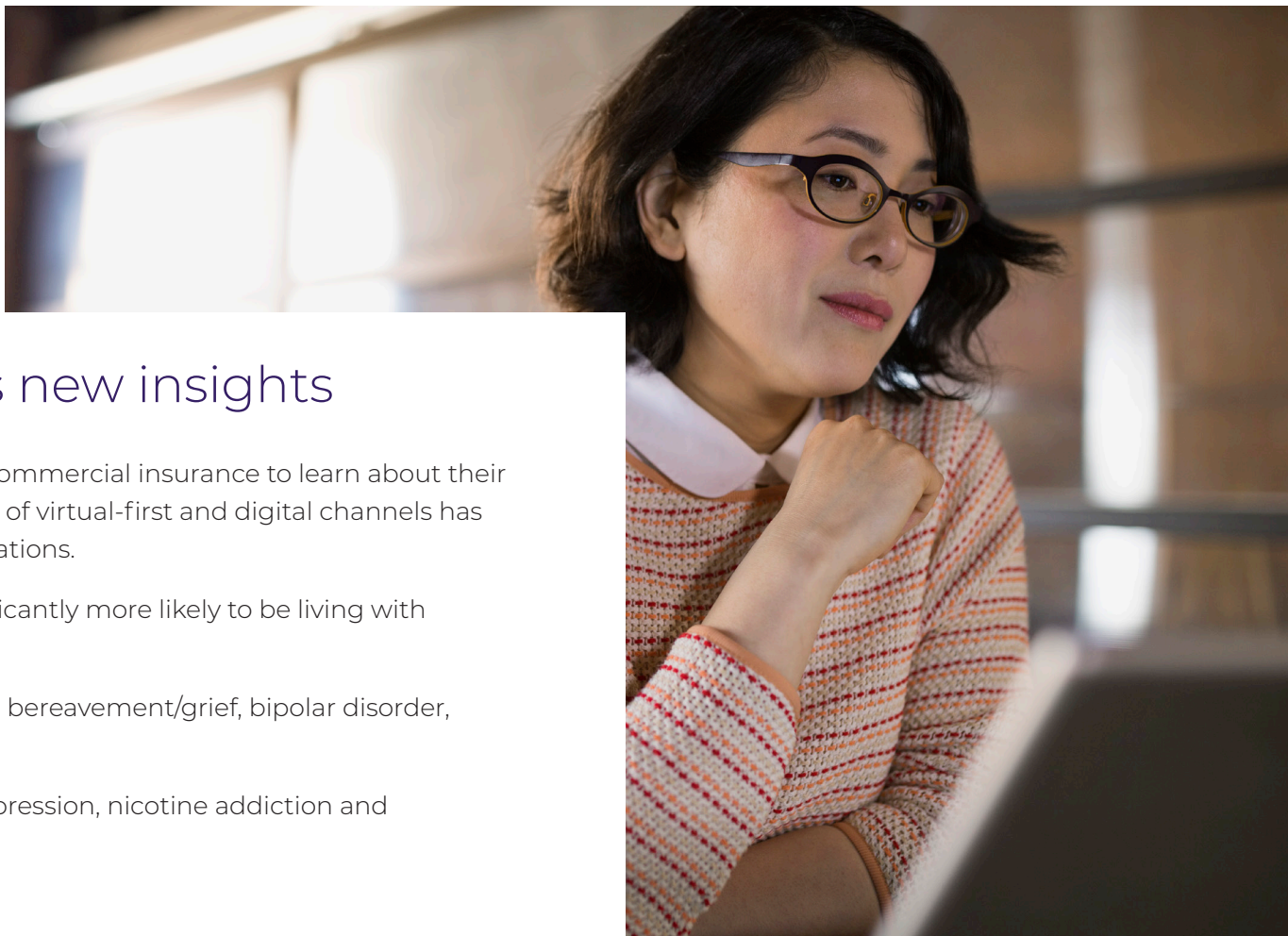
However, in order to transition to an enduring, virtual-first model, we must reassess the way we think about how we address access, meet a full spectrum of mental health needs, and design a highly valued consumer experience. To prepare for the ongoing expansion of virtual-first and digital channel strategies, Teladoc Health surveyed consumers to better understand their experience with virtual mental health care.

Specifically, we wanted to learn:

- What drives adoption of these channels?
- How do consumers describe their experiences?
- What has been the impact on mental health outcomes?
- How are consumers likely to engage going forward?

The following pages outline our methodology and findings.





Surge in demand reveals new insights

Teladoc Health surveyed consumers covered by commercial insurance to learn about their mental health (MH) and how the recent adoption of virtual-first and digital channels has changed their perceptions, behaviors and expectations.

- Those citing mental health concerns were significantly more likely to be living with a chronic medical condition.
- Women more commonly reported anxiety, ADD, bereavement/grief, bipolar disorder, burnout and parenting challenges.
- Men more commonly reported chronic pain, depression, nicotine addiction and substance abuse.

Survey Methodology

Number of respondents

2,253

Demographics

U.S. consumers
Full- or part-time employees
Employees receiving benefits
through their employer

A total of 2,051 survey respondents indicated having mental health concerns. Of these, a majority of 52% sought support, while 48% did not. We call these two groups Support Seekers and Non-Support Seekers. Support, in this study, means websites/mobile apps for self-management of mental health, or virtual or in-person visits with a mental health professional.

Support Seekers

Support Seekers
52% sought support

1,075
respondents

Over half of respondents sought support. Of those who did, 47% used virtual visits with a licensed professional weekly, and reported achieving improvements through their treatment.

91%

of Support Seekers reported at least some improvement during the pandemic.

67%

of Support Seekers reported that mental health services had a significant positive impact on workplace productivity.

76%

of Support Seekers found virtual visits to be very good or excellent — and nearly equivalent to their in-person experience.

Providing mental health support can promote affinity. Nearly 8 in 10 Support Seekers have a positive perception of their employer/health plan.

Non-Support Seekers

Non-Support Seekers
48% did not seek support

976
respondents

People who did not seek support, despite having a mental health concern, most commonly reported stress and anxiety as a concern.

67%

of Non-Support Seekers report deteriorated mental health since the pandemic.

51%

of Non-Support Seekers cited “stress” as a common concern.

58%

of Non-Support Seekers cited “anxiety” as a common concern.

Four external factors set Support Seekers apart

Our research revealed four contextual factors that contribute to a positive, productive mental health care experience: Mental health Support Seekers cited higher levels of success in each of these categories below. These factors fall within the influence of health plans and employers, and drive adoption of virtual and digital mental health services. When combined, they result in higher engagement and more positive perceptions of the health plan/employer contribution.

Access

I know how to access mental health services.



Support Seekers 77%

Non-Support Seekers 57%

Awareness

I know what mental health services are available to me.



Support Seekers 72%

Non-Support Seekers 55%

Support

Where I work, mental health services are given the same level of importance as physical health services.

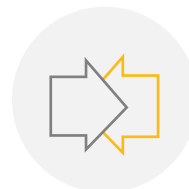


Support Seekers 58%

Non-Support Seekers 41%

Stigma

There is no health stigma where I work.



Support Seekers 53%

Non-Support Seekers 45%

Leveraging learnings for health plans and employers

Health plans and employers should focus their efforts on levels of access, quality of communications, a supportive work culture and how they balance their physical and mental health benefit choices. While Support Seekers powerfully emphasize each point, Non-Support Seekers also indicate the value of each of these elements.

Access



Offer unified access to the full array of channels.

Consumers indicate they are willing to engage in an integrated combination of virtual, digital or in-person services. And the availability of a wide variety of mental health services was significantly higher among those who sought support.

However, nearly 70% indicated it would be difficult, and/or overwhelming to use multiple websites, mobile apps or virtual care platforms to address their mental health needs. They want one single entry point.

Awareness



Educate consumers on how to find and utilize services.

Support Seekers are more likely to know what services are available and have a better understanding of how to access them than Non-Support Seekers.

Consumers have difficulty with self-diagnosis and cannot be expected to self-diagnose. They need to know they have services that can meet them where they are: services that can provide them the type of care they need when they need it. Clear communication becomes a keystone to early engagement and taking the right path to care.

Support

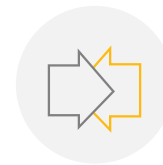


Support mental health and physical health equally.

Support Seekers are more likely to report that their mental health benefits are given the same level of importance as physical health benefits.

Support Seekers and Non-Support Seekers alike voiced a strong preference for a single app for self-management of both their physical and mental health. Consumers want equal availability and easy access.

Stigma



Eliminate the stigma of mental health services.

Digital and virtual platforms offer new levels of privacy and discretion for receiving mental health services. All respondents want a work environment that minimizes the stigma associated with mental health.

More than 8 in 10 Support Seekers now say they are comfortable using mental health resources through their employer. This is a marked shift away from historical concerns with workplace stigma.

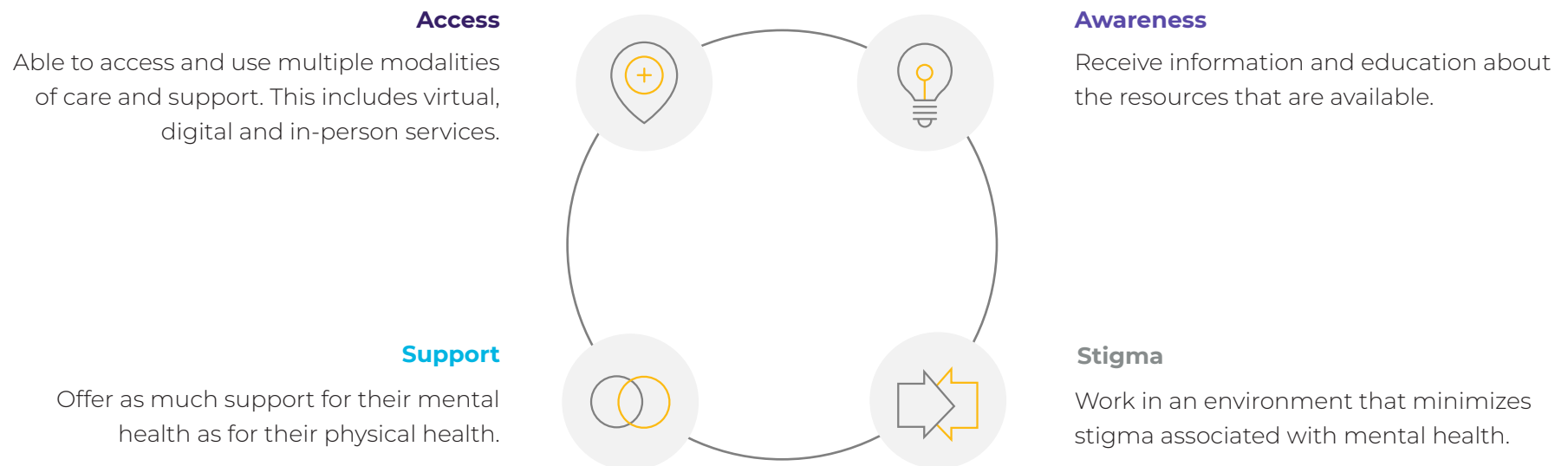
Digital and virtual care usher in a new era of mental health support

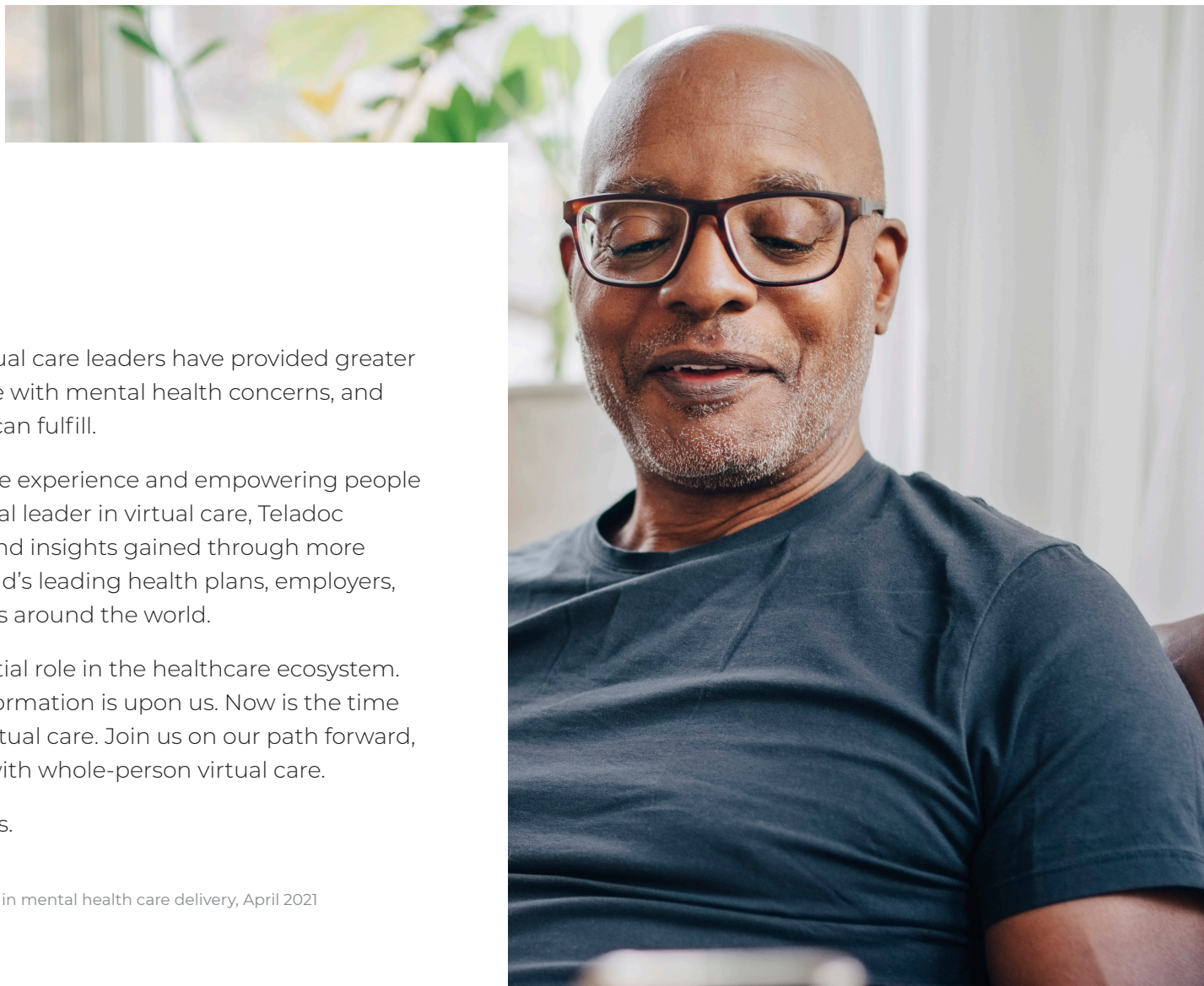
Virtual visits with a mental health professional topped the list of mental health services used during the pandemic. And yet, people who engaged experienced significant mental health benefits. Mental health experts know there are moments when a digital app is just the right tool and other moments where only a visit with a licensed professional will do. But many consumers still need help knowing when they need assistance and where to begin their journey.

A unified digital front door that brings physical and mental health services together is what consumers seek. They want care options that maintain their privacy and create a safe set of experiences.

Effective therapy requires creating meaningful connections to credible mental health resources. And this can be defined differently for any individual.

As consumers build trust with employer/health plan benefits—and digital and virtual tools—we can move out of the early stages of mental health benefits into a rich array of integrated services. Today's tools range from self-serve applications to personalized interventions. Consumers are ready. And with a focus on these four actions, health plans and employers can accelerate engagement of the services that meet people where they are and when they need it.





Conclusion

We hope the perspectives shared by our virtual care leaders have provided greater insight into the behaviors and needs of those with mental health concerns, and the potential that virtual mental healthcare can fulfill.

Teladoc Health is transforming the healthcare experience and empowering people everywhere to live healthier lives. As the global leader in virtual care, Teladoc Health is recognized for quality, innovation and insights gained through more than a decade of experience serving the world's leading health plans, employers, hospitals and health systems, and consumers around the world.

Today, virtual care is primed to play an essential role in the healthcare ecosystem. Without question, the opportunity for transformation is upon us. Now is the time to realize the promise and full potential of virtual care. Join us on our path forward, as we transform the healthcare experience with whole-person virtual care.

Visit TeladocHealth.com for the latest insights.

Sources: Teladoc Health Mental Health White Paper: A new era in mental health care delivery, April 2021

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About Teladoc Health

Teladoc Health is the global virtual care leader, helping millions of people resolve their healthcare needs with confidence. Together with our clients and partners, we are continually modernizing the healthcare experience and making high-quality healthcare a reality for more people and organizations around the world.