

2021

Mental Health:

6 Market Insights & Opportunities



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The Healthcare Landscape Survey

Focus: Mental Health Perceptions

The simultaneous pressures of the pandemic and the chronic presence of substance use (most notably the opioid crisis) seem to have finally created a critical mass of consumer sentiment about mental healthcare: It's not an outlier any longer; it's a critical and integral component of overall health.

This study examines more closely key consumer sentiments related to mental health in the hope that healthcare decision makers see the opportunity we see: To deepen the integration of physical and mental health.

About the CT Healthcare Landscape Survey: Key facts

Produced by: Great Blue & drinkcaffeine

Sample size:

302 adults/CT residents; statistical validity: +/-5.6%

Gender skew:

78F/22M

Age Segments:

- 30%: 35-44
- 23%: 45-54
- 19%: 25-34
- 17.5%: 55-64
- 7%: 65-74

Education:

- 37%: College grad
- 37%: Postgrad/professional degree
- 16%: Some college

Race:

- 87%: White
- 5%: Black/African American
- 5%: Hispanic/Latino

Insurance:

- 33%: HMO/Private Insurance
- 25%: High deductible/HSA
- 16%: Other (Medicare, etc)
- 9%: ACA plan

HHI:

- 17%: \$100K-\$125K
- 16%: \$150K+
- 16%: \$75K-\$100K
- 12%: \$50K-\$75K
- 11%: \$40K-<\$50K



About drinkcaffeine

drinkcaffeine is a healthcare-focused digital marketing firm based in Madison, CT that combines strategic insight, branded content, and digital platforms to achieve measureable results for clients. drinkcaffeine.com



About Great Blue

Great Blue is a research firm based in Glastonbury, CT that combines strategic agility and human insight to deliver quantitative and qualitative findings that validate decisions, optimize results, and prevent costly mistakes. greatblueresearch.com

The key questions

1. Has the pandemic affected people's mental health?

50% say yes. The statement we tested is subjective, but half of all respondents agreed that the pandemic has hurt personal mental wellness.

"COVID-19 has had a strong negative impact on my mental health."

Strongly Agree: 16.2%

Agree: 34.4%

Disagree: 37.4%

Strongly Disagree: 7.0%

Don't Know: 5.0%

If the pandemic has hurt mental health, insurers and providers must be ready to respond. Consumers have learned that health insurance and healthcare are equities earned and paid for with hard work. And they may well expect their health insurance and healthcare providers to play a prescriptive role in the mental health care they are eligible – and entitled – to access.

For consideration:

Occupational mental health at home

Mental health can be affected by many pandemic-related factors: confinement, isolation, and risk of exposure chief among them. We think an opportunity exists for healthcare systems to pioneer Occupational Mental Health at Home – a regimen of practices and resources intended to maintain baseline mental and emotional wellness. [This short blog provides details](#) for anyone interested.

Consumers are learning that mental health coverage is a societal equity that is earned and paid for with hard work, just like physical health coverage.

2. Is addiction really both a physical and a mental health condition?

More than 90% say yes. The statement we tested:

“Addiction is both a physical and mental health condition.”

Strongly Agree: 48.7%

Agree: 41.7%

Disagree: 4.0%

Strongly Disagree: 1.3%

Don't Know: 4.3%

More respondents strongly agree than agree.

It's been nearly 65 years since the AMA declared alcoholism an illness, and it seems the battle to get people to see the complexity of addiction as an interwoven physical and mental health condition is moving in the right direction. This represents a potential tipping point for mental health as a component of care delivery.

For consideration:

To deepen consumer understanding of mental health, it's time to address another aspect of its impact.

Recovery from substance use disorder happens on multiple fronts: physical, psychological, familial, emotional, and social. These are the aspects traditionally addressed through treatment. **But there is an economic and vocational recovery from substance use disorder as well** – and this aspect of it can elevate its significance.

Currently gaining ground in several states are **Recovery Friendly Workplace initiatives** co-sponsored by state agencies and private business. They seek to inform employers that retaining employees in treatment and recovery is good business, and equip them with the tools to do so. [Here's an example of one such program](#) we created for the CT Departments of Labor and Public Health.

It advances the idea of holistic recovery from substance abuse by adding the next logical layer of understanding – ***“Addiction is a physical, mental, and often economic health condition.”***

Addiction is a physical, mental, and often economic health condition.

3. Is “behavioral health” the same thing as “mental health?”

Around 49% of consumers say yes. Respondents were asked to indicate the degree to which they agreed with this statement:

“The term “behavioral health” means the same thing as mental health.”

Strongly Agree: 23.5%

Agree: 25.8%

Disagree: 33.4%

Strongly Disagree: 5.6%

Don’t Know: 11.3%

But almost 40% disagree. The terms “behavioral health” and “mental health” are often used interchangeably, although behavioral health is understood to be the broader category that includes physical/mental issues like eating disorders and alcohol consumption. If almost half of healthcare consumers don’t fully understand the difference mental health care providers need to define it for them.

For consideration:

It’s time for thought leadership on mental health language

Consumers are hungry for information – and perspective. Any health system (academic or otherwise), CHC, group practice, nonprofit, or insurer invested in mental health care should spell out policies and beliefs. The pandemic has intensified behavioral health issues, and they are unlikely to vanish with vaccines. That’s why now may be a good time for healthcare decision makers to define their views on the physical-behavioral-mental health nexus. [Read a short blog on 3 ways to do this.](#)

Now may be the optimal time for healthcare decision makers to define their views on the physical/behavioral/mental health nexus.

4. Is it important to merge physical and mental healthcare?

More than 90% say yes. And nearly 60% feel strongly about the issue.

“It’s important for healthcare systems to merge physical health and mental health care.”

Strongly Agree: 60.6%

Agree: 32.8%

Disagree: 3.6%

Strongly Disagree: 1.0%

Don’t Know: 2.0%

The pandemic has elevated the profile of mental healthcare. Depression, stress, isolation, alienation, substance use, domestic violence and other side effects of the pandemic are making consumers acutely aware that mental health issues are real and treatable.

For consideration:

Teletherapy as an outreach tool

Health systems in the past have used tactics such as wellness clinics, mobile medical units, and health fairs to engage in a health discussion with consumers who otherwise would not engage. [Teletherapy was successful before the onset of the pandemic.](#) It now seems an ideal outreach tool for behavioral health problems because the video platform reduces stigma and encourages people to speak freely and openly.

Teletherapy reduces stigma and encourages free expression.

Telemedicine is not just a care delivery tool. It can be a powerful way to draw consumers into mental health care delivery.

5. Is mental health seen as a contributing factor in other problems?

Sometimes. Mental health is viewed as a coexisting factor in violence, drug abuse, and crime – but not to the same degree for all these issues. The question:

“Mental health problems and _____ usually go together.”

The answers:

Drug abuse

52% think mental health is also
“usually” a factor.

Violence

39% think mental health is also
“usually” a factor.

Crime

36% think mental health is also
“usually” a factor.

For consideration

The commonly identified social determinants of health – economic, educational, environmental, and so forth – need to include mental health as well. Specifically, viewing mental health as an indicator of population health. Which brings us to the last issue.

Social determinants of health – economic, educational, environmental, and so forth – need to include mental health as well.

6. What's the relationship between mental health and societal health?

They are interlocked. The question we asked was posed as a hypothetical:

"If everyone was mentally healthier, a lot of society's problems would go away."

Strongly Agree: 23.8%

Agree: 52.0%

Disagree: 13.6%

Strongly Disagree: 1.0%

Don't Know: 9.6%

Nearly 76% see mental health and societal health as conjoined. The challenge will be to align healthcare delivery, public health policy, payer policy, and healthy workplace practices to enact change.

For consideration:

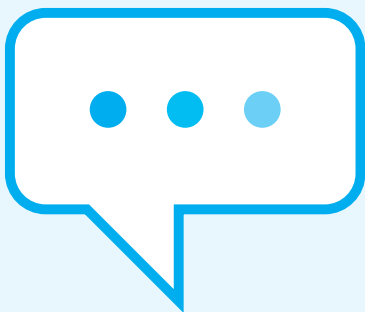
A population mental health study

Strategists in healthcare systems and public health leaders should consider investing in

[research that seeks to understand mental health as a characteristic of population health.](#)

The size and sampling of such a study could be managed with digital distribution and the results could be used to benchmark levels of depression, anxiety, stress, self-care, and other criteria for mental health.

Healthcare systems and public health leaders should consider investing in research that seeks to understand mental health as a characteristic of population health.



To be continued

What we see in this study and others is the ongoing gravitational pull to unite physical and mental healthcare.

Stigmas are not as strong.

The pandemic, opioids, and substance use disorder have reshaped perceptions.

Workplace practices are moving toward better mental health environments.

Consumers are in need and ready to accept help.

Healthcare decision makers, it's your move.

To discuss these findings further, reach out to billm@drinkcaffeine.com