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Insights

The future of behavioral health

Innovating across sectors to address the global crisis

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Executive summary

THE GLOBAL COVID-19 pandemic, its economic fallout, and the companion global confrontation with issues of social justice have together caused enormous strain on the mental and behavioral health of people across the globe. Everywhere, there have been spikes in anxiety, depression, and other behavioral health issues as people navigate the complexity of the current moment. These spike are extensions of a long-simmering crisis in global behavioral health. But change is coming. We have shared our overarching perspective on the Future of Health already, and the future of behavioral health is a critically important aspect of that overarching vision.

Today's global challenges have made clear the need for players across the behavioral health landscape—including but not limited to both private and public insurers, care providers, employers, and government policymakers—to innovate to better serve the behavioral health needs of people across the world. Doing so could not only address a pressing social challenge but also improve health care outcomes; reduce health care costs; and create a healthier, happier, and more productive workforce.

Disruption from cultural change, scientific and technological advancement, increased care access, data sharing, interoperable data, and empowered consumers is creating opportunities across sectors to forge a new future in behavioral health. Illustrative opportunities include:

- Insurers leveraging the incredible array of data at their fingertips to forge new relationships with members, allowing for preventive interventions to address behavioral health needs

- Care providers incorporating an array of new technologies into their practice to provide personalized care to their patients

- Employers offering differentiated behavioral health support to their employees that improves performance and retention

- Government policymakers facilitating deeper partnership across industry players by helping to create shared ethical and regulatory frameworks focused on innovative behavioral health technology

Today's players in the behavioral health ecosystem can seize on these trends and opportunities to address many of today's behavioral health challenges and radically transform people's lives. Doing so will improve health and wellness, create business value, and build stronger, more resilient societies across the world.

The problem: Global behavioral health has long been in crisis and was made worse with 2020's stressors

THE WORLD IS facing a long-simmering crisis with mental and behavioral health. Consider these statistics:

- As of 2017, at least 300 million people were struggling with depression, 284 million with anxiety, and more than 178 million with alcohol or drug addiction.[1] Even though fewer people suffer from the most severe behavioral health problems such as schizophrenia, these illnesses can have devastating impacts on individuals and their families.

- Estimates suggest that at least 1 in 4 people experience significant behavioral illness at some point in life,[2] and an estimated 20% of the working age population in Organization for Economic Co-operation and Development (OECD) countries are affected by mild to moderate disorders at any given moment.[3]

- The consequences can be devastating, especially when behavioral health struggles lead directly to overdose, suicide, or premature death—as

tragically is the case for 1.15 million people annually across the world.[4]

Behavioral health issues limit employees' ability to work at their highest level and, in extreme cases, drive absenteeism.

These challenges create a significant socioeconomic burden on societies everywhere. One study estimated a US$210.5 billion cost to the global economy each year from major depression alone.[5] The direct and indirect costs of behavioral illness are estimated to total up to 4% of global Gross Domestic Product (GDP),[6] exceeding the burden of cancer, diabetes, and respiratory disease combined.[7] Another study projected a US$16 trillion negative impact on the global economy from 2020–2030 if the world does not adequately respond to behavioral health problems.[8]

More concerning still, these studies all predated the COVID-19 pandemic, the resulting economic fallout, and the social unrest related to systemic inequity that emerged in 2020—all of which exacerbated the behavioral health crisis. One recent study in the United States, for example, found that the share of people reporting negative behavioral health impacts from COVID-19 rose from 32% to 53% between March and July 2020.[9]

There is an enormous need for organizations and governments across the world to address these issues. For insurers, acute behavioral health issues are among the greatest drivers of need for medical care and associated costs. Care providers not only have the intrinsic drive to address issues for their patients but also the business imperative to treat their patients and find ways to address their needs. For employers across the world, behavioral health issues limit employees' ability to work at their highest level and, in extreme cases, drive absenteeism. And for government policymakers, ensuring that their citizens can thrive is at the core of the work they do every day.

What are the barriers to improving behavioral health?

NSURERS, CARE PROVIDERS, employers, and government policymakers are investing significant resources in addressing the behavioral health crisis. However, these players all face considerable challenges in addressing the large scope of the crisis. Four challenges particularly merit attention:

1. **Gaps in clinical and scientific knowledge**
   Research into understanding behavioral health disorders is still in an emerging phase. Behavioral disorder classifications deal with multiple causalities, and diagnoses have less discrete categorizations, unclear thresholds between disorder and non-disorder markers, and frequent comorbidities where consumers present with multiple conditions. Less well-defined diagnostic categorization can be based more on dialogue than physical biomarkers. In turn, consumers are often recommended treatments on a trial-and-error basis, and consumers are often unclear about the actions needed to address their behavioral health. Even well-defined disorders can be notoriously difficult to categorize, diagnose, and treat. For example, research suggests that 70% of people with bipolar disorder are initially misdiagnosed.[10]

2. **Stigma and drivers of health**
   In many parts of the globe, individuals struggling with behavioral health face stigma, which is less common for physical health problems.[11] This can make people with behavioral health problems less willing to seek treatment or to share their personal information with others, including clinicians. Meanwhile, drivers of health, such as access to healthy food, a steady income, and a place to live, can contribute to the illness, make it harder to provide effective care, and undermine overall health. In many ways, behavioral health challenges can drive broader health outcomes as well, standing in the way of individuals seeking care for physical health needs and fully participating in society.

FOUR BARRIERS TO POSITIVE CHANGE

The four largest barriers to improving behavioral health are **gaps in scientific and clinical knowledge, the stigma associate with behavioral health, ineffectual and sub-scale care systems, and siloed health care management.**

Gaps in scientific and clinical knowledge limit the ability to accurately diagnose and treat behavioral health conditions. The stigma associated with behavioral health makes consumers less willing to share their information and seek treatment, which in turn makes it harder to provide effective care. Globally, the volume of unaffordable and inaccessible care systems limits consumers' ability to access behavioral health care. Finally, the negative impact of siloed health care data extends to behavioral health data and limits clinicians' insight into clinical decision-making.

3. **Ineffectual and sub-scale care systems**
   This general challenge is made worse by an array of unaffordable and inaccessible care systems across the world. Globally, less than 1% of government health expenditure goes to mental health services.[12] This in part drives a shortage of behavioral health specialists: The rate of behavioral health workers in low-income countries can be as low as 2 per 100,000 people, according to the WHO.[13] The challenge is also pervasive in high-income countries. For example, in the United States, more than 100 million people live in communities designated as "health professional shortage areas" for behavioral health professionals.[14] Although telehealth and app-based access to behavioral health support are expanding, there is a need for diagnosis and care to be more readily accessible and integrated with all medical and social services.

4. **Siloed health care data management**
   As with physical health problems, data sharing is imperfect across available data sources, and the sources for behavioral health information are not interoperable to support clinicians' decision-making and other insights. What's more, even when there is data sharing, it is not necessarily usable by everyone because data is not interoperable across users and systems. Because of the associated stigma, behavioral health challenges may be underreported even when data is available.[15]
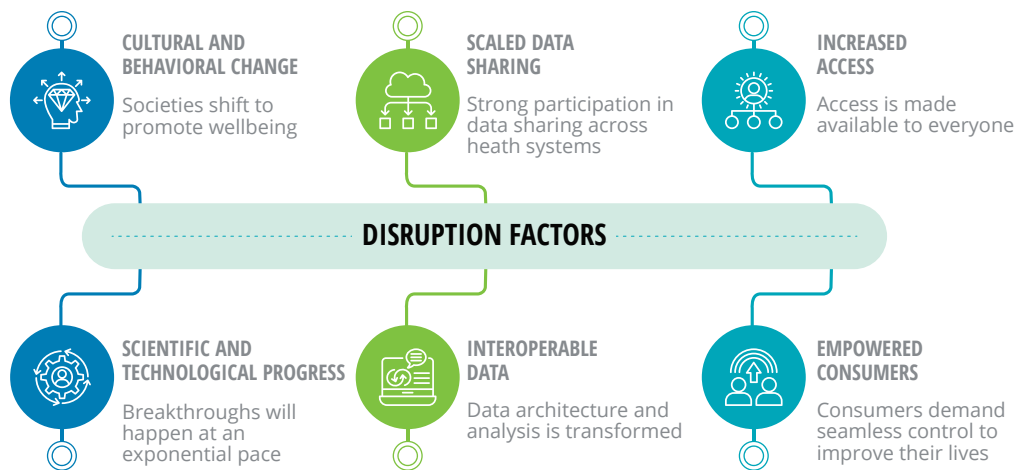
Disruption factors that will create change

A S WE SCAN the trends in the behavioral health landscape, we see six disruption factors that we believe have potential to drive meaningful change in global behavioral health and help to create a brighter future.

FIGURE 1

Disruption Factors Driving Change

CULTURAL AND BEHAVIORAL CHANGE
Societies shift to promote wellbeing

SCALED DATA SHARING
Strong participation in data sharing across heath systems

INCREASED ACCESS
Access is made available to everyone

DISRUPTION FACTORS

SCIENTIFIC AND TECHNOLOGICAL PROGRESS
Breakthroughs will happen at an exponential pace

INTEROPERABLE DATA
Data architecture and analysis is transformed

EMPOWERED CONSUMERS
Consumers demand seamless control to improve their lives

Source: Deloitte analysis.

SIX DISRUPTION FACTORS DRIVING THE FUTURE OF BEHAVIORAL HEALTH

We believe there are six disruption factors that will drive meaningful change in the future of behavioral health. Cultural and behavioral change will lessen the stigma associated with behavioral health due to an increase in government investment and employer emphasis. Advances in our understanding of genetics, neuroscience, endocrinology, and other relevant fields will lead to more thorough knowledge of behavioral health and effective treatments. Increased access to care will occur due to the spread of virtual care and the use of AI to deliver more customized solutions. A more robust data-sharing environment 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 thanks to a more complete understanding of a consumer's behavioral health situation. At the core of these changes is the consumer, who will be more empowered thanks to greater choice of behavioral health treatment and a higher quality overall experience with behavioral health care.

1. **Cultural and behavioral change**

   We believe that stigma about behavioral illness will dramatically lessen, making it easier for people to confront and manage their challenges. These changes are already underway: For example, a study by the Anxiety and Depression Association of America found that 60% of US adults aged 18–25 view seeing a behavioral health professional as a sign of strength, compared to only 35% of adults over 26.[16]

   Governments are helping to lower stigma by increasing investment in behavioral health, which helps to emphasize that the challenges people face are real and deserve attention. They are also elevating challenges and opportunities into public discussions and protecting individuals against behavioral health-related discrimination. Some governments are enacting policy that integrates population-level behavioral health with considerations about collective economic growth, as in New Zealand, where the health budget explicitly supports behavioral health.[17]

   Employers are also playing a role in lowering cultural stigma by explicitly seeking to serve the behavioral health needs of employees and families. A survey of employers found 68% planned to increase emphasis on behavioral health offerings over the next two years.[18]

2. **Scientific and technological advancement**

   We believe that behavioral health care specialists and researchers will conduct ground-breaking research that will lead to a better understanding of the underlying pathologies that drive behavioral illness and more effective treatment. They will do so by exploring the foundations of behavioral health in a way that creates greater understanding of genetics, neuroscience, endocrinology, and other relevant fields intersecting with behavioral health. New treatments will include cost-effective

therapeutic breakthroughs, augmented by a variety of revolutionary tools that bring down costs and improve treatment efficacy. In turn, organizations offering care will be able to tailor treatments to individuals' personal needs and genetic profiles.

Early-stage innovations give us significant confidence in such potential revolutionary breakthroughs. For example, the Qatar Biobank and Qatar Genome Programme are sequencing the human genome of the entire Qatari population, hoping to identify major depressive disorder biomarkers. Studies are also being conducted to make connections between the gut microbiome and the brain to treat depression and other mental illnesses, specifically with treatments such as fecal microbiota transplants.[19] Exposure therapies using virtual reality for patients with anxiety disorders/post-traumatic stress disorder (PTSD) have become increasingly prominent, and virtual reality has begun to be used to better diagnose illness.[20]

3. **Increased access to care**

   We believe that cultural change and increasingly cost-efficient scientific breakthroughs will together lead to better access to care for everyone. Insurance coverage will expand to greater and greater numbers of individuals to enable this access. Emerging digital care modalities and health tools will augment in-person care, and behavioral health treatment will increasingly become a part of primary care—ensuring that scientific and technological breakthroughs are available for everyone. Already, the global health care mobility solutions market is expected to grow 28.4% from 2018–2025 to US$51B, suggesting a proliferation in direct-to-consumer behavioral health care solutions.[21]

   The economic and social fallout of COVID-19 also appears to make consumers more willing to engage in telehealth and share their data. For

example, Brightside, an app offering treatment and medication for anxiety and depression, saw a 50% increase in new users in the early stages of the COVID-19 pandemic.[22] Meanwhile, with increased awareness of racial behavioral health disparities and unequal access to care in the United States, black-led organizations are developing behavioral health resources tailored to minority communities, such as The Safe Space app.[23]

The economic and social fallout of COVID-19 also appears to make consumers more willing to engage in telehealth and share their data.

Access to care is also already being streamlined by artificial intelligence that triages patients and delivers solutions customized to individual needs, such as automated reminders, and flags intervention needs in chronic disease patients.[24] In the future, care providers will be able to integrate tools such as these and digital triage into their regular practice. Moreover, tools combined with clinical breakthroughs will allow for more effective in-patient treatment for individuals who need it.

4. **Data sharing**
    We believe that increased access to behavioral health treatment will in part be possible due to a robust data-sharing environment, in which behavioral health-related data is passively collected via sensing technologies connected to both physiological and social-sharing data.

As stigma declines, consumers will be more willing to share behavioral health data; the willingness to do so for health data broadly has already increased during the pandemic.[25] In the future, consumers will be able to systematically access and control all their data. Advanced governance standards and a secure centralized database can drive an efficient, safe data environment to guarantee privacy and data blinding to ensure that consumers feel comfortable sharing their data. In turn, a health information marketplace carrying clinical and behavioral data could emerge to serve both public and private interests (e.g., enabling care routing and matching).

Shifts are already taking place at a regulatory level to bring this reality to life: California recently published legal guidelines to promote effective sharing of behavioral health and substance use disorder information, and the General Data Protection Regulation in the EU (2018) and other privacy efforts are pushing the world toward increased personal data ownership and autonomy.[26] Meanwhile, enhancements in database security—driven by technology such as block chain—occur every day to ensure data safety.

The confluence of factors such as increased data volume and more stringent regulations enables the safe sharing of behavioral health data from myriad sources. Increased sharing of data will better inform the current state of a person and will allow for proactive identification of potential behavioral health issues before they arise.

5. **Interoperable data**
    We believe data sharing will be underpinned by fully interoperable health data built on universal standards and carried on a personal,

longitudinal life record. This record will collect holistic health data, including broader lifestyle information, that helps identify issues and opportunities with comorbidities. The standardization of health platforms and electronic health records will enable the aggregation of data lakes. Organizations will apply artificial intelligence to this data to predict early onset of behavioral disorders and recommend interventions to improve behavioral health outcomes. These tools will be especially powerful in the context of behavioral health because of the complex array of factors that affect behavioral health outcomes: The more data sources that come together because of interoperability, the better.

These changes needed to create this future are already underway. For example, Apple, Amazon, Google, and Microsoft all committed to supporting data interoperability in health care by publishing open-source, cloud-based software solutions to support greater interoperability.[27]

6. **Empowered consumers**
As a result of these changes, we believe consumers will have better access to high-quality treatment, increased control over treatment modalities, and a higher quality overall experience. They will increasingly

choose to use highly personalized health tools for self-care and to sustain health independently, while fair pricing and increased access to high-quality services will promote equity in care.[28] They will also be able to choose services that break down the walls of traditional services, leveraging on-demand virtual engagement to manage their health.

Consumer data ownership will also mean that consumers are able to monetize that data if they so choose.

What's more, these changes mean consumers will be empowered to critically evaluate care providers prior to treatment. And consumer data ownership will also mean that consumers are able to monetize that data if they so choose. As a result, care providers will put increased emphasis on operating in a more consumer-centric way. In a step indicative of this direction, US Medicare reimbursement rules are being updated to be linked to patient satisfaction scores.[29]

What types of opportunities will these disruption factors create?

WHILE THESE TRENDS are powerful, the future envisioned is not inevitable. To make the vision possible, players across the behavioral health landscape will need to build on these trends to create broader change. Insurers, care providers, employers, and government policymakers will each need to take distinct steps to make this future a reality and seize the relevant opportunities.

Insurers

Insurers from both the private and public sector should build on these trends by focusing more concretely on building plans that offer behavioral health support and on holistic, preventive care for their members. Doing so will drive an overall reduction in costs and allow insurers to meet the changing needs of their members.

Insurers' wide access to consumer data—including health, social, economic, and environmental data at individual and population level—provides an incredible foundation to build on these changes and help bring about this future. This access provides the chance to apply sophisticated analytics to that data to produce behavioral health insights. As interoperability and data sharing increase, insurers will be able to merge the data with a deep understanding of the drivers of health and clinical symptoms of behavioral diseases.

OPPORTUNITIES FOR HEALTH CARE PLAYERS

Insurers, care providers, employers, and government policymakers each have distinct opportunities to build on the disruption factors and create a better future for behavioral health. Insurers can leverage the incredible array of data at their fingertips to forge new relationships with members, allowing for preventive interventions to address behavioral health needs. Care providers can incorporate an array of new technologies into their practice to provide personalized care to their patients. Employers can offer differentiated behavioral health support to their employees that improves performance and retention. Government policymakers can facilitate deeper partnership across industry players by helping to create shared ethical and regulatory frameworks focused on innovative behavioral health technology. The most important driver for achieving the future, though, will be for each player to recognize that they are operating in an integrated system and to forge deep partnerships that build on the trends behind the disruption factors to support consumers' collective behavioral health.

In turn, insurers can develop tailored behavioral health plans that support proactive care and prevention and provide their members customized,

well-rounded support for behavioral health throughout members' lives. These products can run alongside direct-to-member care that builds on the data and analytics infrastructure to enable preventive interventions and tailored solutions for complex behavioral health conditions.

Executing on these shifts will require doubling down on investment in the technology, data infrastructure, and advanced analytics required to take advantage of the data that insurers already have. Insurers across the world have already begun to face down the challenge of updating legacy technology systems and fighting global technology firms for the talent needed to deliver on these changes. To go even further, groups could consider creative cross-sector collaboration that blends different types of data—such as that from social media and consumer spending—to improve consumers' behavioral health. They might also consider piloting creative programs with their own employees that could eventually be scaled more broadly.

Insurers will also need to broaden the types of behavioral health care networks they offer members, in part by finding ways to creatively reimburse providers for a wider array of preventive behavioral health services. Such steps will be necessary to expand access to care and to support business models that leverage the array of potential provider types, new technology systems, predictive information, and increasingly personalized interventions that can help solve behavioral health challenges. These steps will also help drive access to care and build better relationships with consumers.

These adjustments will be challenging, as they may require experimenting in plan design or creating test-and-learn modalities to determine whether taking steps like waiving cost sharing for behavioral health needs might create long-term benefit. Nevertheless, a willingness to go beyond the scope of today's insurers with the vision to

prevent behavioral health issues from emerging will be essential to insurers' long-term success and to bringing about the future of behavioral health.

Care providers

Care providers must build on these disruption factors to deliver better care for their patients. As with insurers, their efforts to create this future will lean heavily on their access to consumer behavioral health data and ability to apply advanced analytics to support their patients' behavioral health. Increased data sharing by consumers, including from apps, wearables geared toward behavioral health, and deployment of telepsychology and virtual care, can enable providers to create and deliver preventive, personalized care solutions supported by advanced predictive modeling and analytics.

Providers have an opportunity to leverage emerging technology to enable these interventions as well—but doing so will entail significant shifts in the way behavioral health care is delivered today. Organizations will need to begin systematically incorporating technology into their care delivery at every step of their patients' journeys in a way that may significantly change traditional approaches. An enormous array of technology options is emerging that can support patient care, such as self-guided, gamified treatment to virtual assistants and AI that can be used to ensure better care for patients through enhanced digital triage processes, augmented and virtual reality treatments, and computational psychiatry. Care providers can leverage each of these changes—and many more—to deliver better outcomes for their patients. (Other examples of such technology use by both care practitioners and other ecosystem players appear in the sidebar "Technology that is set to transform the behavioral health ecosystem.") Providers should explore ways to implement these technologies in both inpatient and outpatient settings.

Meanwhile, providers will need to augment workforce capacity through community and in-home behavioral health care to ensure individuals receive treatment as early as possible. Physicians of all specialties will simultaneously need to integrate preventive behavioral health

treatment into care. Both steps will require creative workforce planning and tailored education.

To that end, providers globally will need to continue to lean further into value-based financing models that compensate providers based on the

TECHNOLOGY THAT IS SET TO TRANSFORM THE BEHAVIORAL HEALTH ECOSYSTEM

An array of disruptive technology is already emerging to support—or compete with—major players in the behavioral health ecosystem. We've selected a few categories of these technologies to highlight below.

Virtual assistants are AI chatbots and emotion-based algorithms that provide psychological support (often based on clinical techniques), information, and resources using a natural interaction that is low stigma and scalable. **Emerging example:** Tess is a mental health chatbot that delivers emotional well-being coping strategies to its users. Produced by X2AI, Tess can be implemented by health plans, providers, or employers to bridge the gap between care and provide 24/7 support to patients. Studies show that Tess leads to reduced anxiety (-18%) and depression (-28%) symptoms in users.[30]

Digital consumer experience technologies are platforms that manage the patient relationship, monitor and exchange health information between patient and caregivers, and connect the patient with auxiliary tools to enhance their experiences. **Emerging example:** NeuroFlow provides a suite of tools to enable remote monitoring and behavioral health integration across the continuum of care, including psychology, primary care, and pain management settings.[31]

Diagnostic support technologies are screening tools, both self-guided and assisting medical diagnosis, that gather diagnostic data and provide psychological assessment to identify symptoms for early detection and improved classification. **Emerging example:** Unmind is a workplace mental health platform empowering organizations and employees to measurably improve their mental well-being through scientifically backed assessments, tools, training, and signposting.[32]

Neurological interventions offer improved and new surgical, ingestible, and non-invasive interventional tools to observe and affect brain and body function. **Emerging example:** WVU Medicine recently launched a clinical trial using deep brain simulation (DBS) for patients suffering from treatment-resistant opioid use disorder. DBS, or brain pacemaker surgery, involves implantation of tiny electrodes into specific brain areas to regulate the structures involved in addiction and behavioral self-control.[33]

Digital phenotyping systems offer customized treatment, monitoring, and clinical decisions from new biomarkers enabled by wearables and IoT devices to obtain biofeedback, track changes, and deliver new interventions in real time. **Emerging example:** ABILIFY MYCITE is a prescription medicine of an aripiprazole tablet with an Ingestible Event Marker (IEM) sensor inside it used in adults for the treatment of schizophrenia, major depressive disorder, and bipolar I disorder.[34]

Physical, augmented, and virtual reality offers psychological intervention using hyper-realistic virtual environments and real-world robotics for companionship, experiential treatment sessions, and enhanced cognitive experiences. **Emerging example:** Calm Place, from Mimerse AB, is a relaxation virtual reality experience that's being used in hospitals to decrease stress and anxiety.[35]

overall quality of care. Such a shift will allow providers to invest in the preventive care required for behavioral health, mitigating any downstream financial consequences for earlier intervention. The challenges of these shifts—from implementing a new culture to aligning workforce incentives with organizational goals—can be tremendous. Nurturing a collaborative relationship with insurers and aligning on goals to address behavioral health will be essential to succeeding in this context.

Employers

Employers everywhere face the need and opportunity to build on the disruption factors to create a future that meets employees' behavioral health needs. Doing so is crucial to business success: It will be required both to compete effectively for talent and to help workers thrive.

In turn, employers should consider introducing customized products and workplace services that integrate behavioral health treatments into employees' work lives. These services may go beyond prevention and resilience and seek to increase an individual's acuity, acumen, abilities, ethics, or social capacities in a similar way that gyms, supplements, and plastic surgeons seek to extend physical capacities. Such an effort might include having employees opt into passive behavioral health data collection that can be leveraged to support employee needs.

The greatest challenges employers will need to navigate in this context are ethical and cultural. They need to meet employees' rising expectations for the role that employers can play in their lives— helping to realize a new social contract in which more support to employees becomes the norm. In the process, employers must also show employees that engaging with their behavioral health at work will not harm their career trajectory. As a starting point, employers could appoint ethics and health

data protection officers to manage and protect data, as is the case with private health information across the world. They can also go beyond traditional employee assistance programs to offer higher quality, differentiated behavioral health support that allows employees to pursue their well-being holistically.

Employers not familiar with the delivery of such services may stumble in implementing them. To mitigate the challenge, they might consider a partnership-based approach that leverages the expertise of other parties in delivering their new benefits and services.

Government policymakers

Ultimately, these future opportunities indicate that players across the behavioral health landscape will need to work together closely to adapt to current trends. Without collaboration and integration, each player will not be able to fully realize the potential for change. Policymakers and regulators have an opportunity to play a powerful role in facilitating this integration. They must work across the full ecosystem to build alignment and consensus and ensure individuals with the greatest behavioral health needs have health care coverage and are a part of the integrated system of care. In the process, they should continuously focus on building trust— both with the public at large and with players across industries.

To help make these opportunities possible, policymakers will need to continue to prioritize new investment in behavioral health solutions in both local and national government. While the budget constraints created by the pandemic and its economic fallout are forcing leaders to make difficult decisions, it has become clear that investment in behavioral health is even more important in these trying times. Ensuring adequate institutional architecture to serve individuals with acute challenges will be a part of this process.

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Policymakers will also need to consider ways to systematically enable monitoring and care by leveraging new technology. This process must include creating expansive licensing requirements for behavioral health specialists that allow specialists to leverage telehealth to work nationally or even internationally. In the process of caring for these changes, policymakers will need to work with other industry players to ensure that there is government-sponsored support for the shifting reimbursement models that will be required to support the future of behavioral health.

For policymakers, managing the ethical and regulatory gray areas that exist around behavioral health will be a necessary part of this process. They will need to play a role in making sure that consumers have ownership over their behavioral health data and take steps to create organizations like centers for data ethics that support effective management in an increasingly interoperable world. Meanwhile, as awareness of behavioral health conditions increases, stigma breaks down, and as significant scientific breakthroughs occur, policymakers will have to consider regulations that guarantee corporations do not discriminate against individuals based on their behavioral health. As always, pursuing such a policy and regulatory agenda will include considering the fine balance between the needs of corporations to deliver on the goals of their owners and shareholders and those of the individuals they employ.

Ultimately, in making policy decisions to create the future of behavioral health, governments will need to focus on integration across insurers, care providers, and employers. The goal to serve all people who are struggling with their behavioral health benefits all stakeholders, but it is much more likely to be achieved if different stakeholders work together.

Conclusion

THE PACE OF change for the future of behavioral health has accelerated in the face of 2020's enormous challenges, which have also shone a light on the extent of the problems. Today's industry participants and future new entrants and disruptors will take advantage of the trends in culture, consumerism, data, technology use, and scientific insights to develop solutions and business models that can radically transform and improve behavioral health challenges. Doing so will generate value on multiple levels—creating business value, improving health and wellness, and building stronger, more resilient societies across the world.

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