



CHEAT SHEET
for the entire health care ecosystem

The Role of Digital Health Vendors in Behavioral Health Care

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Key takeaways

- Digital behavioral health vendors provide several types of services that include mental wellness support, peer community connection, tele-behavioral therapy, prescription management, and digital therapeutics.
- The growth of digital vendors has increased access to care—for some. Without adequate insurance coverage, the cost of digital behavioral health care can be prohibitively high for consumers paying out of pocket.

What is it?

Digital behavioral health vendors provide a range of therapeutic services delivered remotely to patients. Without the need for in-person interaction, these services have grown in scope and popularity. As of 2020, an estimated 20,000 apps designed for mental health were available through Apple and Android operating systems. The growth of these vendors have improved access to care for many patients, as virtual or asynchronous care is easier to fit into busy schedules, reduces transportation needs, and may come at lower price points than in person services. However, the success of the interventions is largely reliant on consumers having access to the appropriate technology and the skills to use it, which creates barriers for some patients.

The most common types of digital behavioral health services include:

- 1. Mental wellness:** Provide access to guided videos, articles, and other resources about behavioral health and wellness. Examples: Headspace, Sanvello, Calm.
- 2. Peer community websites and forums:** Connect patients to peers with similar conditions to share their experiences. Examples: Togetherall, Therapy Tribe, Mental Health Empowerment Project.
- 3. Tele-behavioral therapy:** Connect patients to a therapist via live appointments and/or real-time messaging. Examples: Talkspace, Teladoc, Bettermind, Ginger.
- 4. Prescription management:** Offer online counseling services with medication prescription and delivery. Examples: reSET-O (by Pear Therapeutics), Akili Interactive.
- 5. Digital therapeutics:** Offer software-based treatments built on clinically-proven approaches to behavior change for long-term disease prevention and management of conditions like substance use disorders, insomnia, and PTSD. Examples: Pear Therapeutics, Freespira.

How does it work?

Financial overview

Digital behavioral health services have continued to grow in scale and investment. [Rock Health reported](#) in 2021, digital behavioral health startups raised a record \$5.1 billion, doubling their 2020 funding total and eclipsing all other clinical categories by nearly \$3.3 billion.

Tele-behavioral apps, digital therapeutics apps, prescription management apps, and the “paid” portions of wellness apps are either paid for via insurance, employers, or out-of-pocket by consumers. Payers typically require vendors to prove efficacy before they provide coverage. These services can become expensive for users, though out of pocket costs vary greatly. Whereas some wellness apps may offer paid content for a small monthly fee, more specialized services, such as the opioid use disorder prescription app reSET-O offered by Pear Therapeutics, can cost patients a one-time price of \$1665.

On the other hand, peer community websites and forums are often administered by nonprofit organizations and have little to no cost for patients to engage on their platform.



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