Virgo Insights

The Aquarius Study

Not okay

What's not okay with mental health tech and what people want instead

An independent study by Catalina Butnaru and Virgo Insights

Dedication

The most important work is 'inner work'.

If we do it, we can overcome difficult, ugly things, both within and without. We can heal racism, sexism, and any form of violence to another and to self. This study is dedicated to everyone doing **the hard inner work, despite difficulties.**

Catalina Butnaru, Founder

Contents

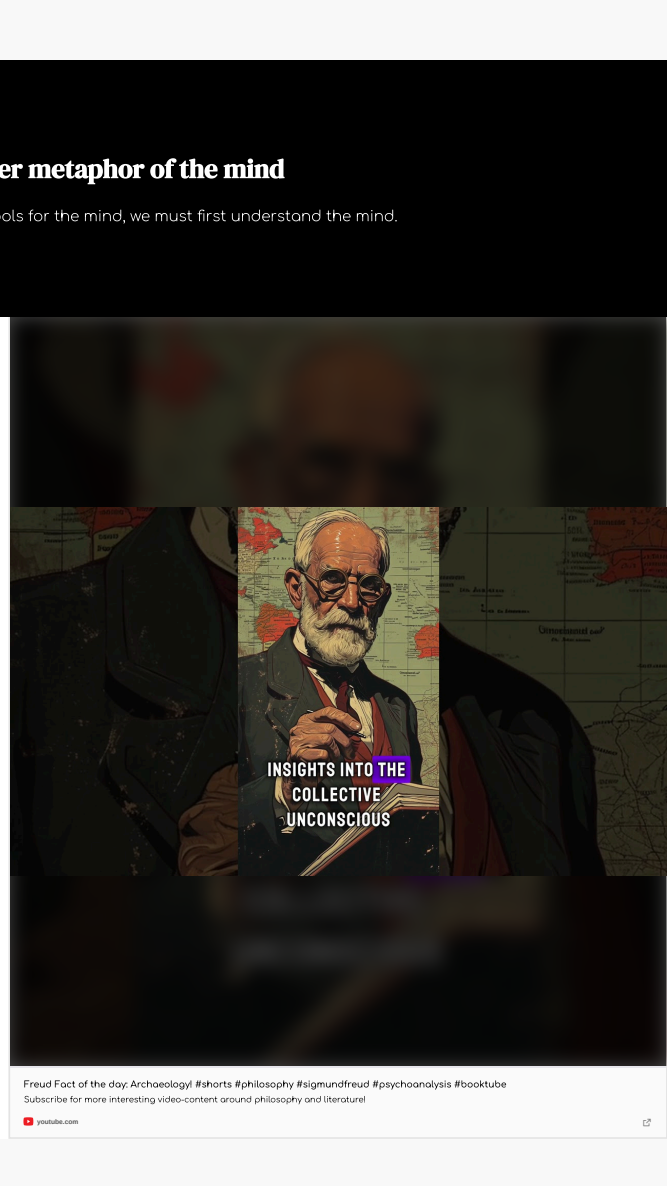
Freud's master metaphor of the mind
What's not okay with mental health tech
What people don't want - The 9 NO's
What people expect - The 4 NOWs
What people want instead - The 3 WOWs
About the study

01

Freud's master metaphor of the mind

To build the right tools for the mind, we must first understand the mind.

"The psychoanalyst, like the archaeologist in their excavations, must dig layer after layer the patient psyche before he can find the most profound and valuable treasures."
- Sigmund Freud



Freud Fact of the day: Archaeology! #shorts #philosophy #sigmundfreud #psychoanalysis #booktube
Subscribe for more interesting video content around philosophy and literature!
youtube.com

When we say that we need to "dig deep" to face our demons... that's as close as we get to Freud's **master metaphor for the mind**, likening the psyche to an archeological landscape, with layers of experiences determining what we can or cannot build in life.

The metaphor shows how personal experiences, like mind strata, layered one on top of the other, form the foundation upon which life can flourish. These layers consist of conscious and unconscious deposits of meaning, emotions, and psychological content. **This becomes the site for our life's greatest work - inner work.**

Every single one of us need to tend to this 'inner landscape' if want to build a wholesome life.

Tending to surface layers...

Everyday achievements, like tending to small flowers and plants, don't require much depth – merely discipline and a daily dose of micro-investments to maintain a better lifestyle.

...or deeper ones

Bigger goals run deep and require a solid foundation. Our tallest trees grow roots into the furthest layers of our childhood and our high-rises must stand on solid rock to endure the quakes of a life crisis.

And for all of this, we need the right tools to tend to all layers of our psyche.

02

What's 'Not okay' with mental health tech

Mental health tech doesn't help you do the work.

The problem with mental health tech

Real change requires **work**. The more committed we are to it, the more serious we become about finding the right tools to do it. Today's mental health tech isn't quite right for the job. Here's why:

- It's highly transactional. Technologists tend to quantify wellbeing into, for example, the number of mindfulness minutes achieved, target stress levels, or '5-step transformation plans'.
- It can distract from 'doing the real work'. This happens with apps that gamify self-help practices, getting people hooked up on surface-level rewards, ultimately leading to cognitive or spiritual bypassing.
- It charges for convenience. Efficient and convenient access to mental health should be a basic requirement, not a reason to charge people a premium. People want to pay for *doing* therapy, not for having *access* to it.
- It uses AI to conceal lack of expertise. This applies to usage of gen AI and digital phenotypes to accelerate 'diagnosis' or compensate for waiting time.
- It's ambivalent. It makes no distinction between illness-focused therapies - the ones that fix you with drugs and incisions - and human or even-soul centred therapies - the ones that help you become whole. Consequently, your healing will flip-flop between fixing brokenness and wholeness.

Real **change** requires **work**. The kind that cannot be optimised with technology, lest you bypass it.

What you need instead it to look at your own stuff and build resilience. That's the kind of inner work technology should help you focus on, not the kind that requires you to tally up 100 mindfulness minutes. That's why mental health tech needs a change.

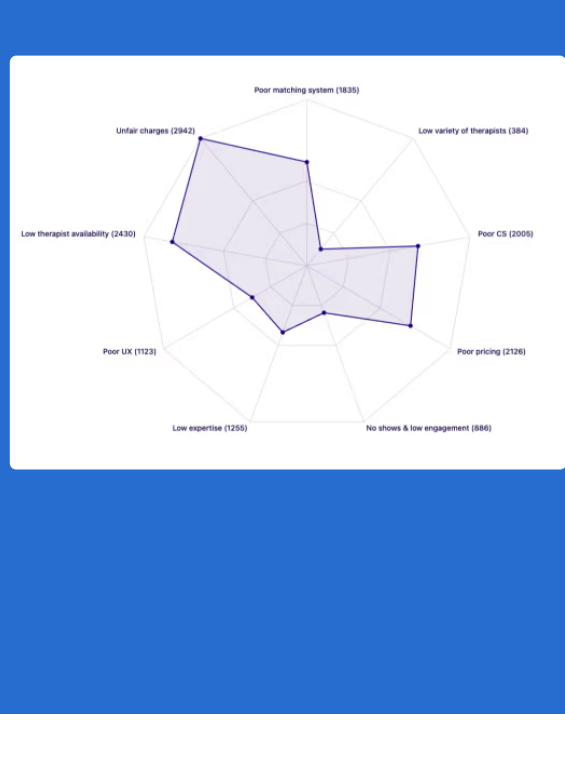
Honest work. That's what mental health tech should focus on.

THE MICRO LEVEL

What's 'Not okay' with mental health technology | The 9 NO's

I've analysed what 600 people said about mental health tech and here's what I found. People say 'NO' to:

- **Unfair charges** (2942 words/25 people)
- **Low availability** (2430 words/22 people)
- **Poor pricing systems** (2126 words/18 people)
- **Poor CS** (2005 words/20 people)
- **Poor matches** (1835 words/14 people)
- **Low expertise** (1255 words/11 people)
- **Poor UX** (1123 words/9 people)
- **Ghosting** (886 words/9 people)
- **Low diversity** (384 words/4 people)

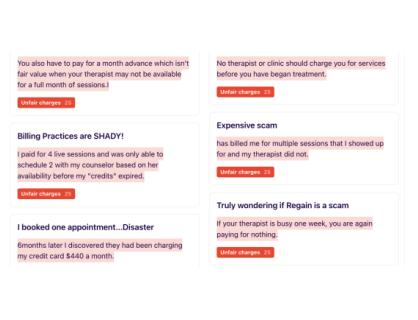


Nine things that are "Not okay" for people

1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Being charged for access, not therapy

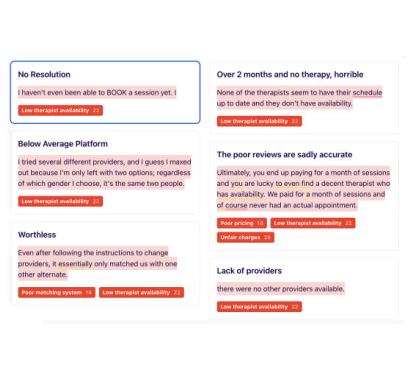
Access to therapy options is not a luxury to pay for, it's a basic requirement. People who struggle with life's challenges are rightly outraged to pay when they haven't even received help to get back on their feet.



1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Not finding available therapists

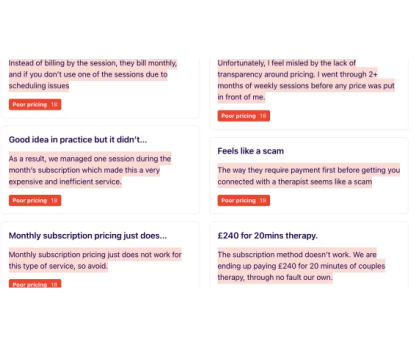
Once your subscription kicks in, you expect to use it right away. When there aren't therapists available, people are forced to wait for months while paying ongoing fees.



1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Not getting their money's worth

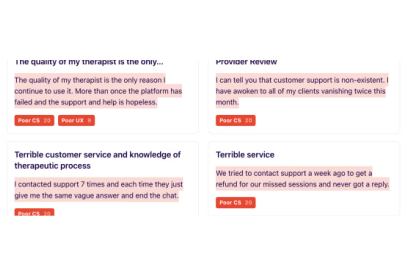
Too many people believe that subscriptions simply don't work with therapy because of low therapist availability.



1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Feeling unsupported

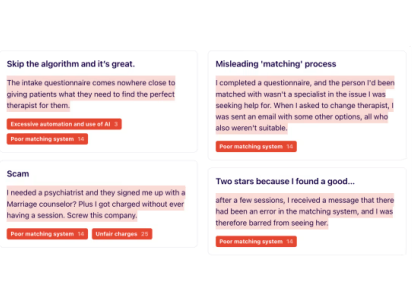
Poor customer service makes people leave therapy platforms. Why would you stay, when you're already dealing with a crippling lack of support in your own life?



1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Not finding the right fit

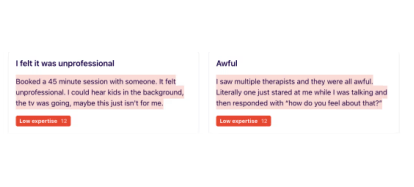
Platforms that don't cover the basics of matching - like finding a therapist within a desired area of expertise or even speaking one's native language - are sure to send people away.



1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Receiving poor therapy

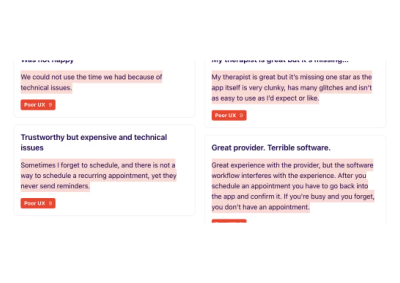
When platforms fail to screen for trained and qualified therapists, people will give up trying.



1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Getting stuck in tech issues

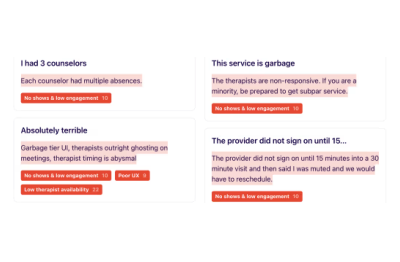
People who are in a bad spot don't have the energy to deal with buggy or poorly designed software. Small things like can get in the way of therapy.



1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Being ghosted

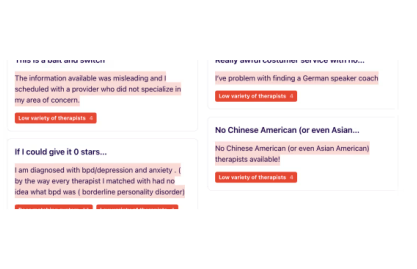
Therapists rarely ghost patients. If that happens more often on platforms than in real life, then something is wrong with the technology and people avoid it.



1 Unfair charges
2 Low availability
3 Poor pricing system
4 Poor CS
5 Poor matches
6 Low expertise
7 Poor CX
8 No shows
9 Low diversity

Being underrepresented

People are increasingly turned off by lack of diversity: from cultural and ethnic representation to specialists in a specific therapeutic practice.



The way forward

What people want instead.

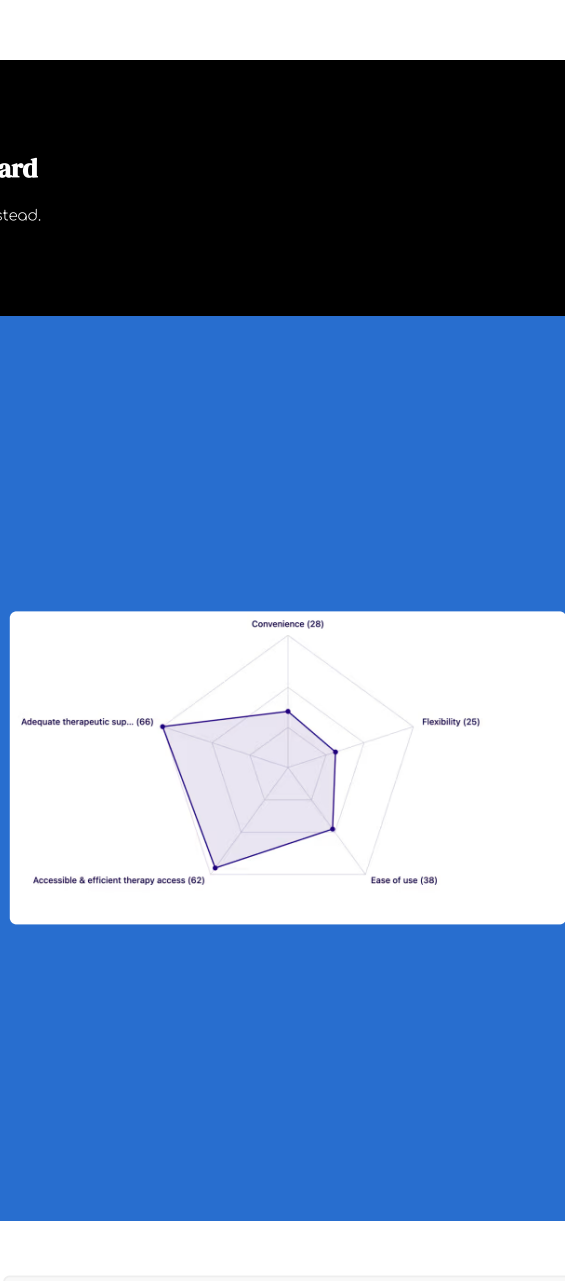
What people expect | The 5 NOWs

NOWs represent people's expectations. We are genuinely pleased when they're met, but not overly impressed.

People don't use too many words to describe their expectations. For example, they'll say 'it's easy to use' and leave at that because it's self-explanatory and to-be-expected.

The 5 NOWs that emerged from 600 people's voices are:

- ✓ **Accessible** and efficient access to therapy (62 people)
- ✓ **Adequate** support (66 people)
- ✓ **Ease of use** (38 people)
- ✓ **Convenience** (28 people)
- ✓ **Flexibility** (25 people)



62 people

Expect efficient access to therapy

Most therapy platforms position themselves as efficient and accessible, but that shouldn't be a core value proposition. It should be a mandatory requirement.

When a British woman tragically died after waiting for seven hours in the A&E, the nation shuddered. Waiting for care can be fatal. That's why efficient access to care must be enforced through all systems underpinning it.

What about mental health?

Severe depression is more debilitating than an untreated spinal cord injury.

Shouldn't efficient access to mental health help be a mandatory requirement? You shouldn't have to pay extra for greater accessibility, you should demand it. It's not a perk, it's a must have. Your life depends on it.

66 people

Expect adequate therapeutic support

It goes without saying that platforms are as good as the quality of its services.

In this research, 66 people (mildly to highly) praise the quality of care provided.

Although the research doesn't cover a practitioner's point of view, undoubtedly therapist also leave reviews of various platforms referencing the quality of clients' behavior.

The quality of services, content, and behaviors is expressed in stats like NPS, usage, complaints, and incidents. Should any of these stats tilt too far towards the negative end, the platform in question will swiftly need to correct the issue, else disaster ensues.

Trust and quality are very difficult to maintain, but they will make or break two-sided marketplaces.

Think of Airbnb: if too many guests complain about being scammed or report any form of anti-social behavior, the platform's popularity will decline. If too many hosts become dissatisfied with the quality of guests, a shortage in places will lead to increased prices, which ultimately means that Airbnb stays will no longer be appealing to people.

AirBnb trust stats:

- 15.4% of guest complaints involve scams (2024)
- <0.1% of stays result in a reported safety issue (2022)
- $7M - the largest amount paid by Airbnb to a female guest who was attacked and robbed during one of her stays (Source)
- Up to 15% of stays could result in damages, most of which are covered with AirCover, based on hosts' anecdotal comments, though no official stats are available.

Thankfully, Airbnb stats related to trust, quality and safety seem to be well within acceptable margins.

What are your standards for mental health?

28 people

Expect convenience

Convenience in mental health is like asking for a better basecamp before climbing Mount Everest. It's like saying – "I've already broken a few bones to get here, can you please make the bed a bit more comfortable?"

Tending to soul injuries while putting up a functional front at work, at home, and in public life is exhausting. Convenient access to mental health care is a lifeline, not a perk.

There's an argument for making people aware of becoming too tech-dependent when technology makes everything convenient. It doesn't quite apply to mental health.

When mild forms of depression and anxiety are as debilitating as untreated motor injuries, people don't have the energy to navigate everything as well as everyone else.

People need convenience not because they're lazy, but because this stuff is hard on them.

25 people

Expect flexibility

In the words of people using therapy app themselves, flexibility is the ability to 'change appointments, switch therapists, and pause-unpause access to services as needed'. The latter is also the most painful, if not available.

Lack of flexibility feels like paying to wait at a bus stop while planning your route. Might as well wait at a coffee shop, and enjoy a coffee break, right?

When you need to change therapists or appointments, it doesn't feel right to pay for sessions you don't have. However, this is exactly what happens on subscription apps: changing therapists and appointments is easy, but you must continue paying your monthly fees, even if your next next session is months away.

More on this topic in the 'NO's' section.

Why is flexibility needed?

The need for flexibility comes from an every real problem, which is ghosting. The therapeutic relationship is not one we can easily flip a switch on and off, but people should be free to discontinue sessions within reason. Some people struggle to discuss this, so they coast through therapy until one day they stop showing up. Others may want to cancel within respectable limits, without affecting the therapist's practice and schedule, but don't want to be stuck looking for an alternative.

Is flexibility truly honoured?

Online, flexibility is possible only when demand meets supply (therapist availability) and when platforms reinforce reasonable cancellation policies, while providing more comfortable levers for changing therapists or appointments. More honest matches happen as a result, and both parties gain from the arrangement.

Thus, the requirement for greater flexibility is a natural consequence of a balanced marketplace, not a value proposition in itself.

However, flexibility is not fully honoured by some therapy platforms.

Fascinating, no?

Some of the therapy platforms you use today claim higher subscription fees for meeting your basic needs and expectations. Now you know you should ask for more instead.

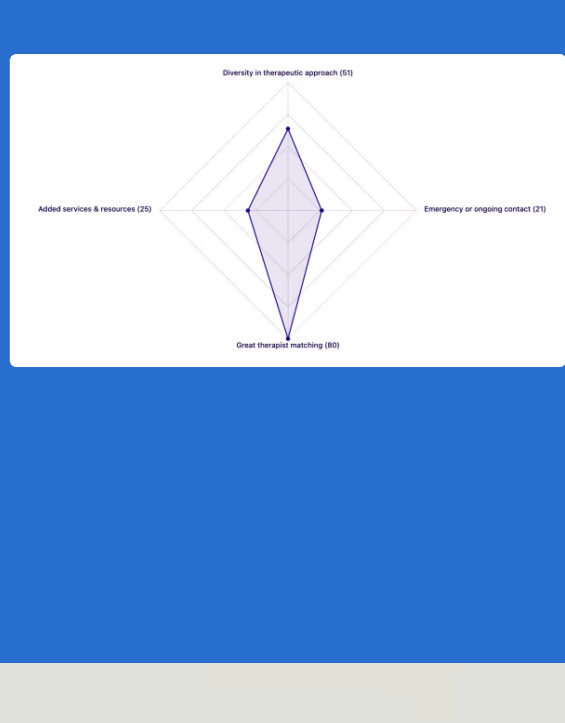
If this insight benefitted you in any way, please consider supporting Virgo Insights. Thank you ❤.

HTML Element
Custom HTML Element
Code

What people want instead | The 4 WOWs

This is what people need instead to do the real, honest work of 'inner work'. Compared to 'NOWs', it seems like so little, yet only a few mental tech deliver it:

- ✓ **Diversity** (51 people)
- ✓ **Great matches** (80 people)
- ✓ **Ongoing contact** (21 people)
- ✓ **Smart services & resources** (25 people)



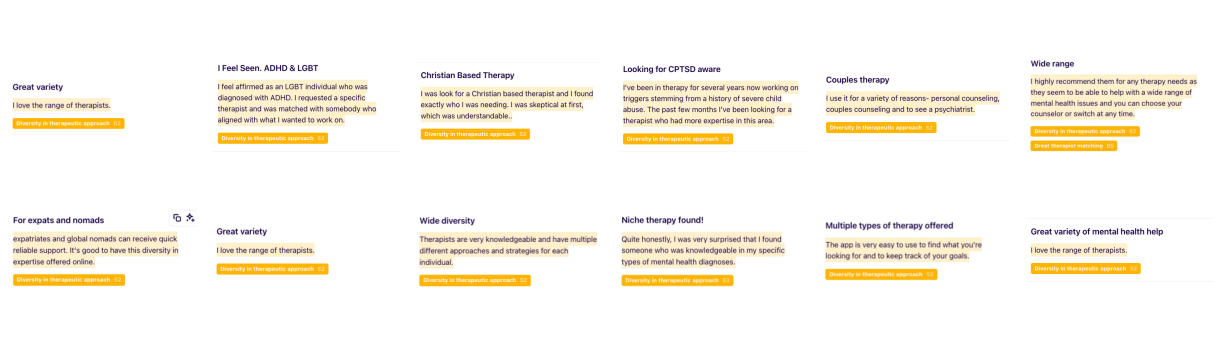
Choice and diversity

51 people

People ask for diversity in therapists, so they can choose what's right for them. This is especially true of younger generations, including Gen Z.

They want CBT as much as they want dreamwork, they want neurodivergent practices just as much as they want spiritual practices. Their expansive meaning-making frameworks are opposing old ways of labelling, diagnosing, and medicating the mind... and the soul.

The modern seeker wants therapies that honour diversity and wholeness and refute those that inflict further oppression and pain.



Better matches

80 people

Diversity is people's #1 choice. **The second one is being matched with the right therapist.** You may want to contest this ranking, judging by the numbers alone, but stay with me...

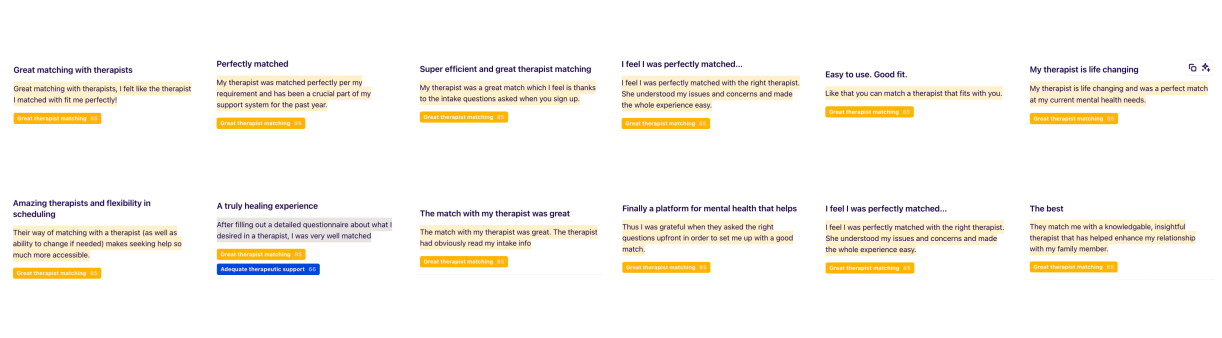
The sheer volume of feedback associated with 'great matches' doesn't quite tell the full story. You risk being data-driven but human-blind.

When you feel your therapist is a great match, **choice is implied**. The seeker has already exercised their wish before having established a great therapeutic alliance.

The second WOW factor - **great matches** - can be facilitated by technology, but is predominantly an interpersonal, unconscious dimension.

You can't simply develop a 'Tinder for therapy'. It's not algorithmic, it's deeply personal.

People subconsciously pick on hundreds of details before they realize which therapist right for them. Therefore, matching can never be fully automated, lest you deprive our natural born instinct of crucial choices.



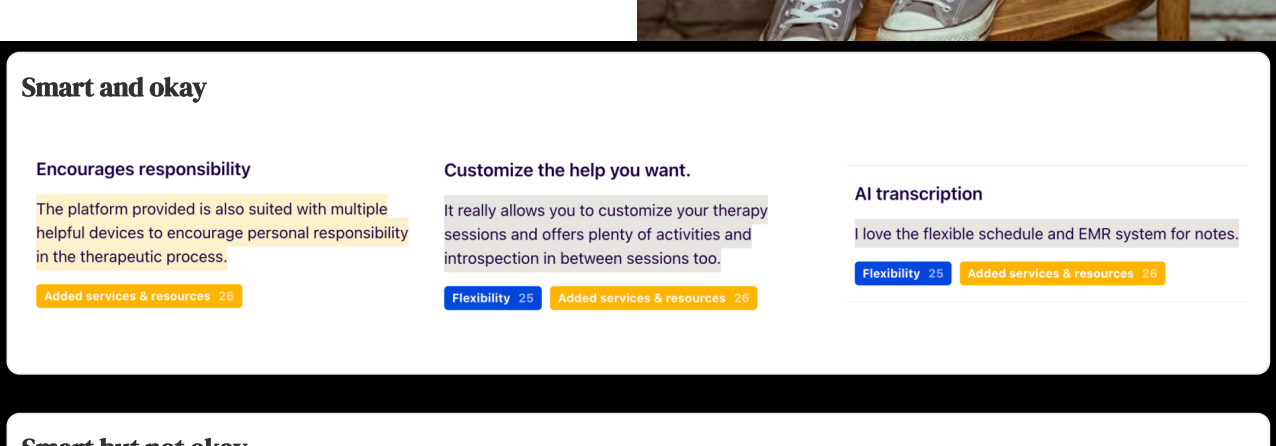
Smart tools

25 people

Want **smart features** and access to additional services. In their own words, they appreciate 'smart reminders', 'homework', 'journals' and async access to online classes. Simple things, that are aligned with the therapeutic process.

The modern therapy seeker doesn't want technology to replace therapy, doesn't want AI-enhanced anything. They want to use the kind of 'smart feature' that helps them be more accountable and go deeper in their healing process.

Technology in and of itself will never be the primary agent of change. People are.

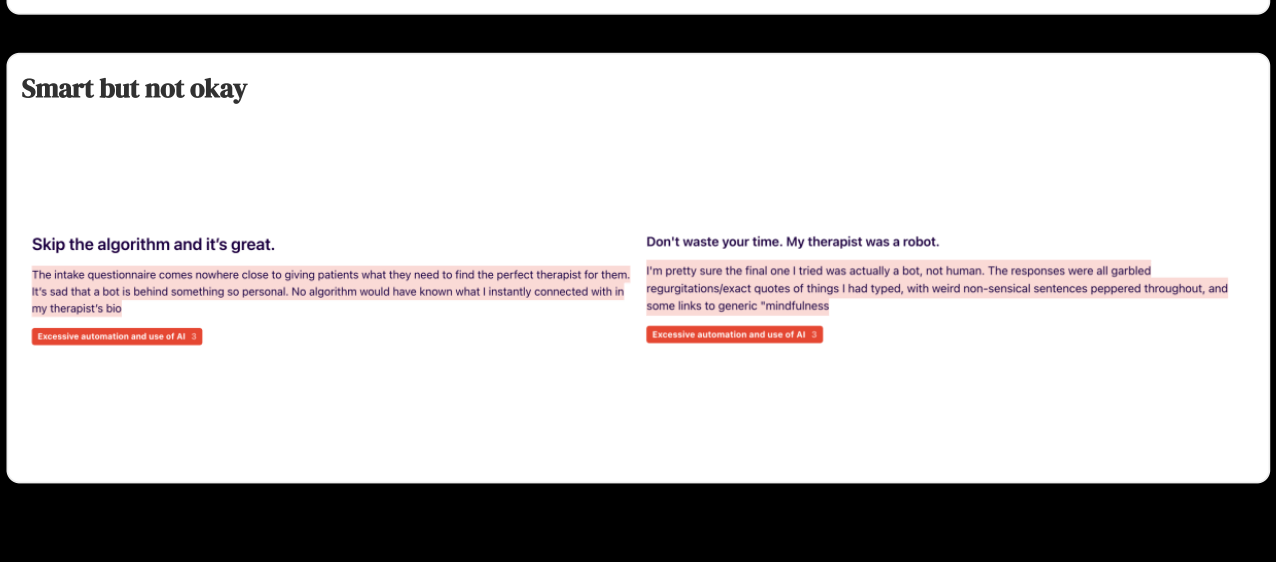


Smart and okay

Encourages responsibility
The platform provided is also suited with multiple helpful devices to encourage personal responsibility in the therapeutic process.
Added services & resources 25

Customize the help you want.
It really allows you to customize your therapy sessions and offers plenty of activities and introspection in between sessions too.
Flexibility 25 | Added services & resources 25

AI transcription
I love the flexible schedule and EMR system for notes.
Flexibility 25 | Added services & resources 25



Smart but not okay

Skip the algorithm and it's great.
The intake questionnaire comes nowhere close to giving patients what they need to find the perfect therapist for them. It's sad that a bot is behind something so personal. No algorithm would have known what I instantly connected with in my therapist's bio
Excessive automation and use of AI 8

Don't waste your time. My therapist was a robot.
I'm pretty sure the final one I tried was actually a bot, not human. The responses were all garbled regurgitations/exact quotes of things I had typed, with weird non-sensical sentences peppered throughout, and some links to generic "mindfulness
Excessive automation and use of AI 8

Technology is not the primary agent of change, people are

65%

Increase in online therapy usage since the pandemic.[1]

There are over 300,000 tech-enhanced digital therapy alternatives as of 2022. Technology is now advanced enough to automate digital phenotyping, diagnosis, therapeutic intervention, and emulate sympathetic 'talk therapy' with LLMs and gen AI. It can look like:

1. **Chatbots**, which are using artificial intelligence (AI) and natural language processing to determine the intent and engage in conversations with text, text to speech, and virtual avatars.
2. **Automated therapeutic intervention delivered** online, eg. CPTD or CPTSD coaching apps.

96%

of users stopped therapy with a CBT app after 2 weeks[1]

Just because it can, it doesn't mean people want it.

In fact, high dropout rates from CBT delivered with nonhuman therapists and apps suggest that **the therapeutic process is deeply misunderstood and misaligned with what technology has to offer.**

Further evolutions, like secure and ethically aligned XAI in mental health, look more promising, but people will suss out when AI is used to compensate for lack of expertise and drop out

HTML Element
Custom HTML Element
Code

[1] Gratzer, D., Torous, J., Lam, R. W., Patten, S. B., Kutcher, S., Chan, S., Vigo, D., Pajer, K., & Yatham, L. N. (2021). Our Digital Moment: Innovations and Opportunities in Digital Mental Health Care. Canadian Journal of Psychiatry. Revue Canadienne de Psychiatrie, 66(1), 5-8.

Ongoing contact

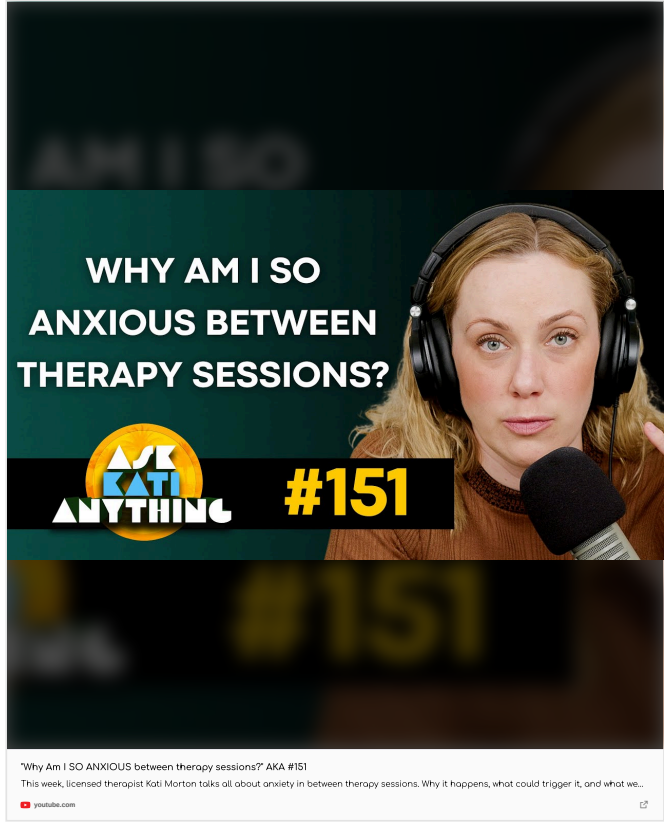
21 people

Want **to maintain ongoing contact** or be able to chat with their therapists in case of emergency.

Although therapists usually set strict boundaries, limiting contact outside sessions and limiting the kind of help they're able to offer, people increasingly want ongoing support.

Like talking to your sponsor in AA in moments of crisis or on the brink of relapse, people have an internal awareness that 90% of the work happens outside the session, so they need to be in touch.

Facilitating and negotiating safety contact nets is critical to therapy, and platforms that can offer it within reasonable terms for both therapist and individual, are the ones winning.



"Why Am I SO ANXIOUS between therapy sessions?" AKA #151
This week, licensed therapist Kati Morton talks all about anxiety in between therapy sessions. Why it happens, what could trigger it, and what we...
youtube.com

How will it change your life?

Knowing what kind of tools serve the therapeutic process, you can now choose differently. Go ahead, use these insights to choose better. Your mental health depends on it.

If this benefitted you in any way, please consider supporting Virgo Insights. Thank you ❤.

HTML Element
Custom HTML Element
Code

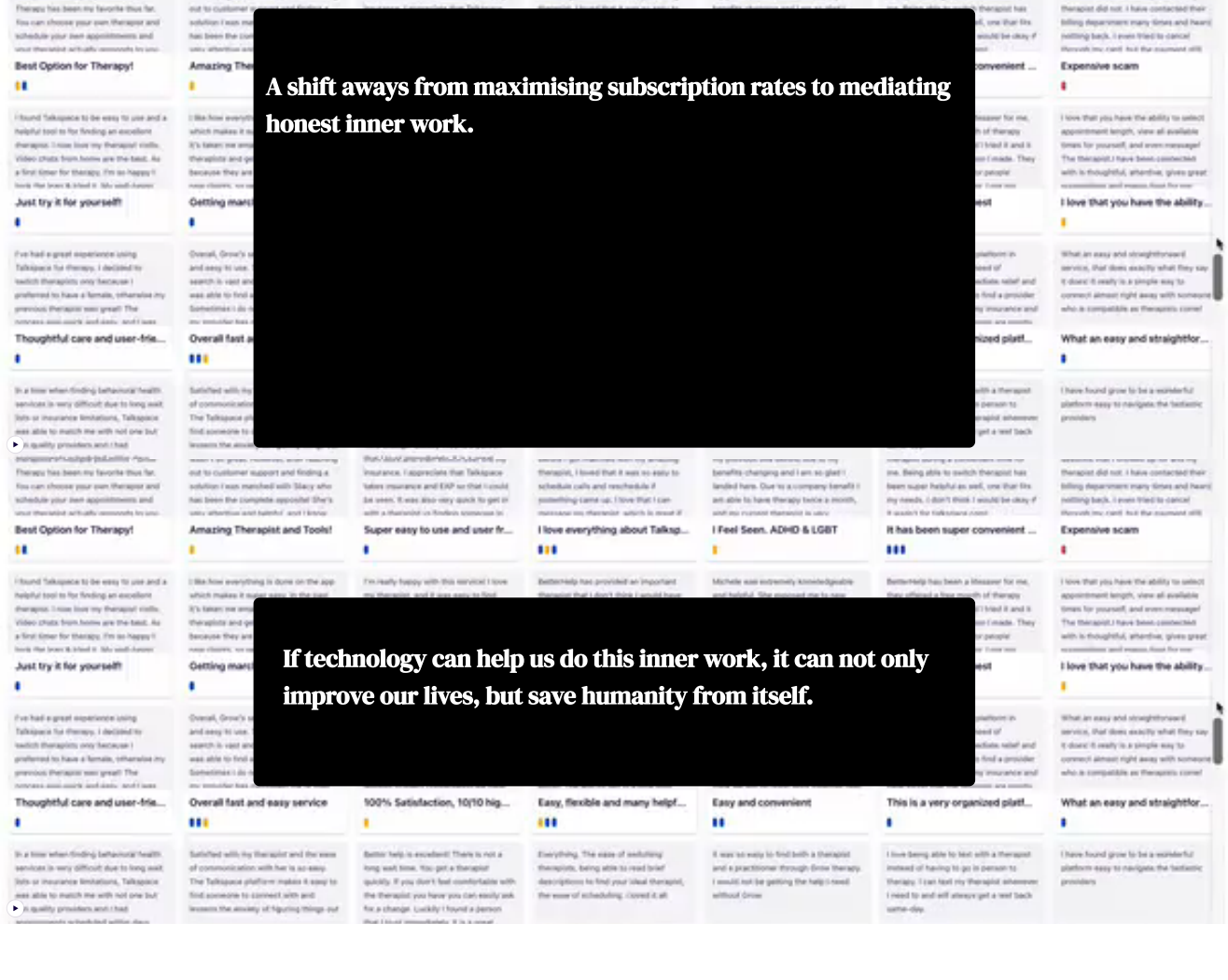
The Study

Analysing what people say to predict what they want

600 people

Using Dovetail, I've analysed what people said about three popular therapy platforms, across 600 public reviews.

This research surfaced insights that should bring about a fundamental shift in how mental health tech is built...

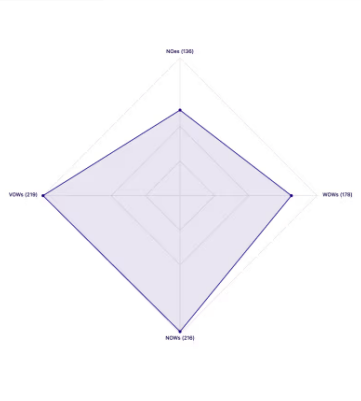


A shift away from maximising subscription rates to mediating honest inner work.

If technology can help us do this inner work, it can not only improve our lives, but save humanity from itself.

The framework

The Framework | WOWs | NOWs | NOs | VOWs



Four dimensions

I've been a PMM for nearly a decade, helping companies create and win in product categories. I've worked with large companies and small ones, but the most valuable work experiences were not about strategy, GTM, or launches.

They were about understanding real people, real world problems and rising needs. I uncovered them through 'customer immersions' and 'market research'. Regardless of terminology, they clicked with my highly empathetic, neurodivergent brain.

Armed with this knowledge, experience, and my unique 7th sense, I developed a framework that helps me predict what people really want.

Let me explain...

The Framework | WOWs | NOWs | NOs | VOWs

The WOWs | What people really want

This framework standardises and categorizes what people say - across reviews, surveys, interviews, feedback - into four buckets: I call them NOWs, WOWs, NOs, and VOWs.

WOWs stand for emerging needs. To decipher the WOWs of mental health tech, you need first-hand experience as a therapist. Only then will you know that, for example, "therapist matching" isn't about designing algorithms that take away choice, it's about leaving enough room for the seeker's unconscious to find its own 'healer'.

WOWs are subtle, but powerful. It's what people really want what truly serves them, and what would eventually make mental health products exceedingly competitive.

The Framework | WOWs | NOWs | NOs | VOWs

NOWs | What people expect

NOWs keep you humble.

They're usually associated with positive sentiment. They're concise, to the point, expectations.

Fulfilling NOWs will not make you stand out, but will keep you in the game. You will deliver on people's basic expectations, like privacy, efficient access to mental health care, flexibility, and convenience.

You'll truly help people without glamorising mental health. This doesn't mean you can charge special subscription fees. Knowing people's NOWs keeps you humble. And that's a good thing. After all, your goal should be to serve humanity, not to shareholders.

The Framework | WOWs | NOWs | NOs | VOWs

NOs | What's not okay

NO's go beyond reasons for churn and dissatisfaction. NOs tell you directly what people don't want, as well as what harms them.

For example, subscription plans that force people into paying for sessions they didn't have are directly harmful financially. Indirectly, unfair subscription fees make people associate mental help with luxury, or worse, with sophisticated scams designed to take advantage of one's suffering, leading them down the path of further alienation from much-needed support.

Take care to understand that a mental health tool that doesn't quite succeed is not just another failed startup. It's a message to vulnerable people that they will continue to be taken advantage of.

And those who voice their 'Nos' aren't just complaining, they're showing incredible strength and speaking up about the need for a profound change.

The Framework | WOWs | NOWs | NOs | VOWs

VOWs | What people are willing to pay for

VOWs are the reasons why people will gladly shift their loyalties (vows) to you if you meet certain requirements. It's not true that people always go for cheaper services. Premium fees are accepted and even sought after if there's real value unlocked in return. Which products can you 'VOW' to use for life and trust them with your mental health?

Why do you care?

I've done this study in service of humanity. Because, when it comes to mental health technology, I use it, my friends use it, my colleagues use it, and you will use it one day.

Our mental health deserves the best tools, whether we dip our toes into one or two practices or dive deeply into our chosen path towards individuation.

I've been an academic psychologist for 2 decades and a Jungian at heart. From the moment I opened my first psychology book at the age of 13 until today, I devoured all things cognitive psychology and psychoanalysis.

Over the past year, I've also completed Level 1 in counselling skills and volunteered for dozens of hours of listening practice.

Being out in the real world gave me the often-missed perspective of what people actually need to do the hard, honest work of inner work.

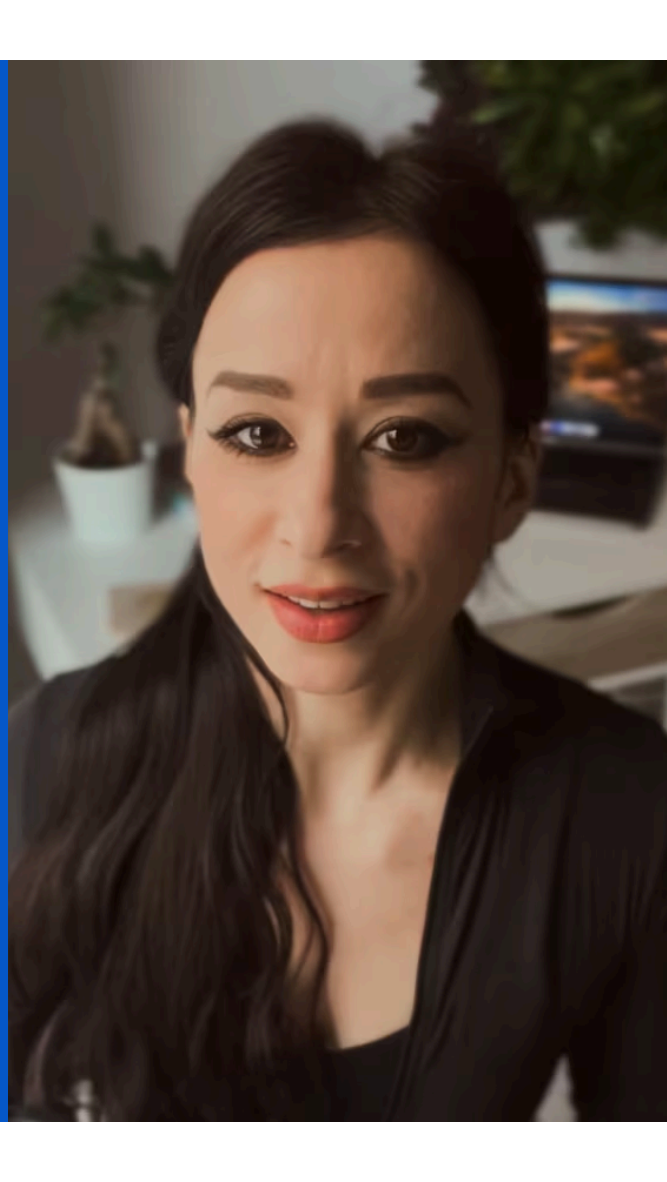
These requirements are very poorly understood and defined in tech companies because the most people hired to work in tech companies have little to no experience with helping people.

Plus, what companies care about is shareholder value, expressed in subscription rate renewal, revenue, cost efficiencies.

Healing and honest inner work is never a priority, though it should be.

With my humble background in helping work, volunteering, and academic psychology, I'm putting forward a more refined proposal of what people really want from mental health tech, based on a modest analysis of 600 public reviews.

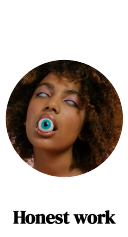
Catalina Butnaru, Founder, Jungian and Virgo



Read other studies

Pure freedom
Tools of the unapologetically free – A Jungian perspective

Honest heroes
An ode to the unsung feminine hero



Honest work
Tech tools for resilient souls

Fury, fire, flume
The female rage that purged this generation

Stitch me
Inspire the next Virgo study. Stitch me @virgo.london

Virgo Insights

Independent people and technology studies that will change your life.

I started Virgo Insights in service of humanity.

Without an unbiased view, we'll keep spinning in circles, stuck in mistakes and in systems that don't serve us.

Every study we drop offers a new lens. Virgo Insights provides you with an different perspective. Divergent. Grounded in reality. Intuitive. Not tied to business agendas and shareholder value.

Maybe this view will help you make better choices. Maybe **it will change your life.**

If you found these insights helpful, consider supporting us.

HTML Element
Custom HTML Element
Code

London