





With quality, outcomes, and value the watchwords for health care in the 21<sup>st</sup> century, sector stakeholders around the globe are looking for innovative, costeffective ways to deliver patient-centered, technologyenabled "smart" health care, both inside and outside hospital walls.

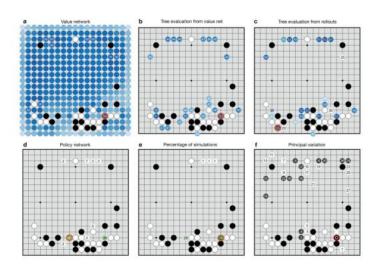
Deloitte 2018 Global Health Care Outlook The Evolution of Smart Health Care



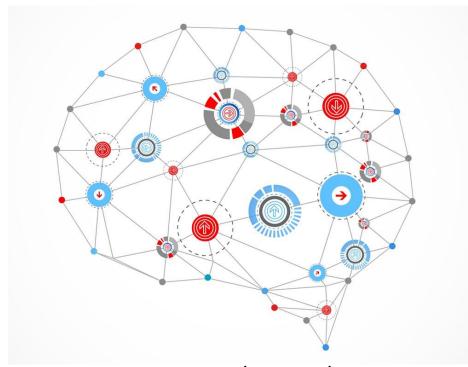
#### Smart health care – Overview & Outlook

## **SMART HEALTHCARE**

- Google searching
- AlphaGo Mastered the Game of Go with Deep Neural Networks



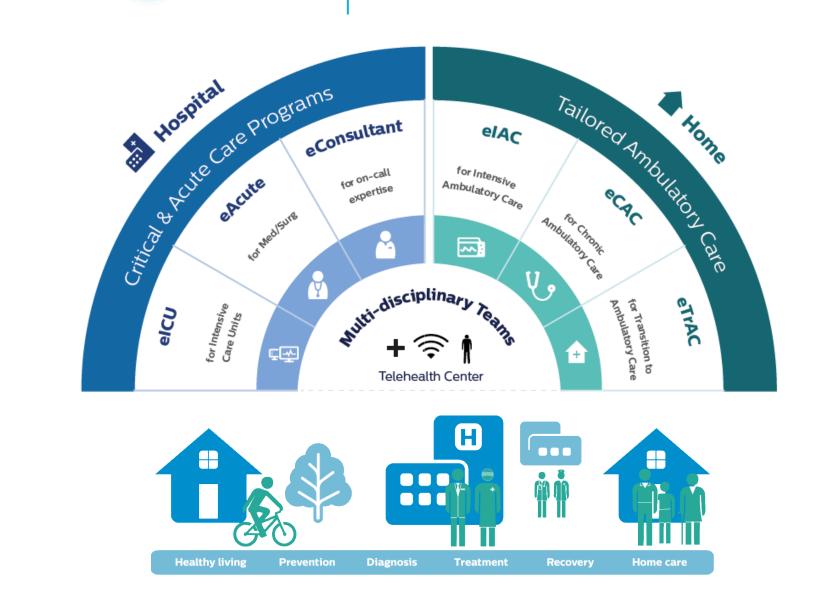




**Neural Networks** 



#### Waves of transformation in healthcare





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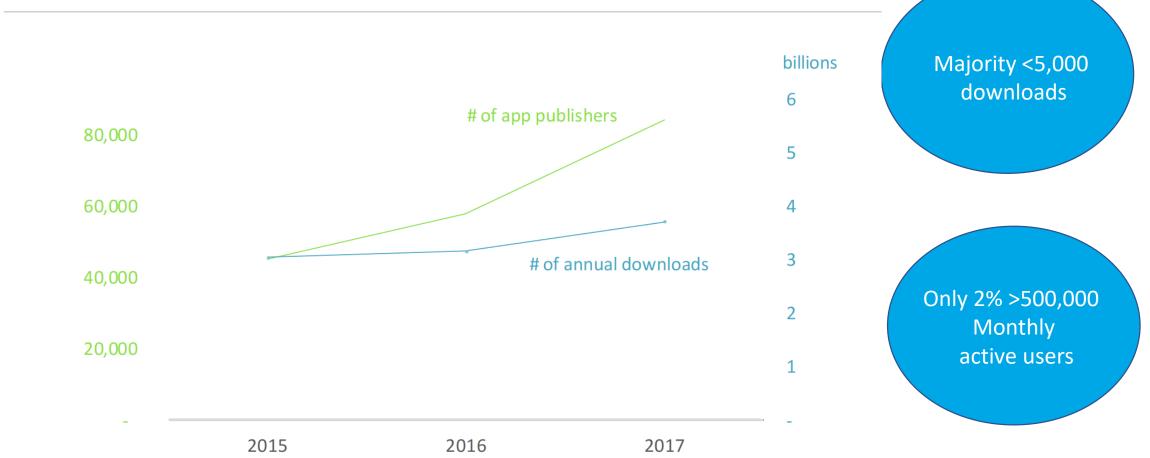








#### Number of downloads of health apps; number of health app publishers 2015-2017





# Wellness Management

 Facilitate tracking and modification of fitness behaviors, lifestyle and stress and diet

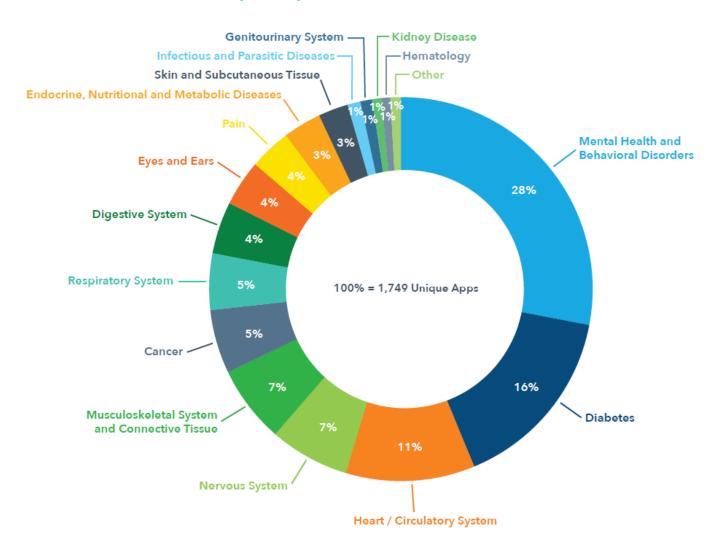
# Health Condition Management

 Information on diseases and conditions, enable access to care and enable treatment protocols



#### Health Condition Management

Exhibit 6: Disease-Specific Apps by Therapy Area



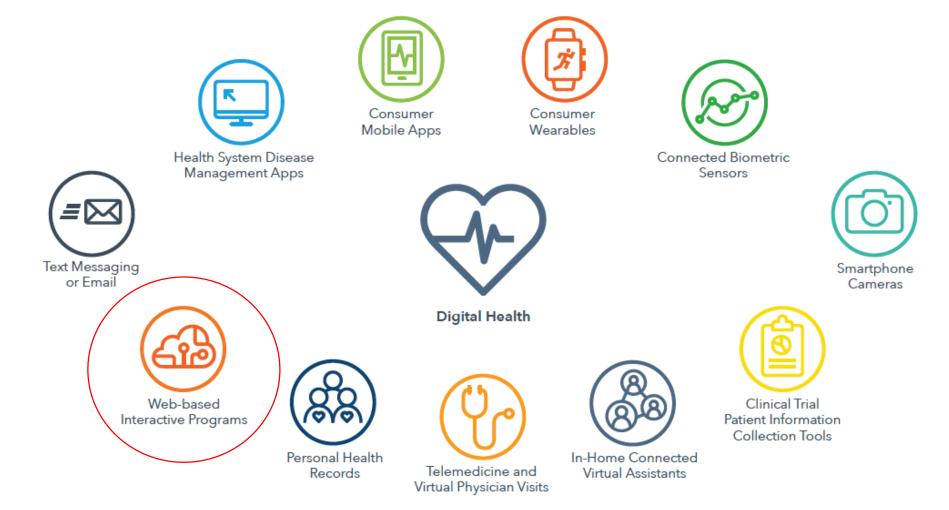
#### Top five condition management areas

- 1. Mental health conditions
- 2. Diabetes
- 3. Heart and circulatory conditions
- 4. Nervous system disorders
- 5. Musculoskeletal conditions



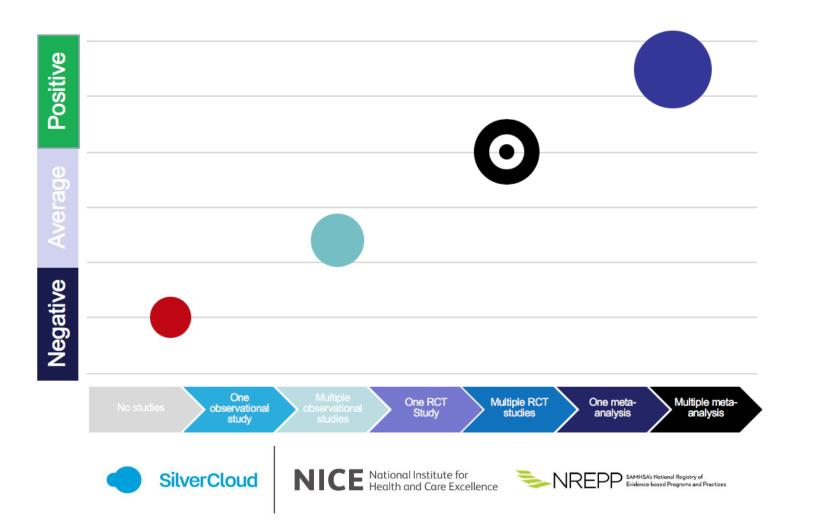
## Health Condition Management Ecosystem

#### **Exhibit 1: Digital Health Tools**





### Maturity of digital health efficacy studies



Candidates for inclusion in Clinical guidelines: Depression, Anxiety, Diabetes.



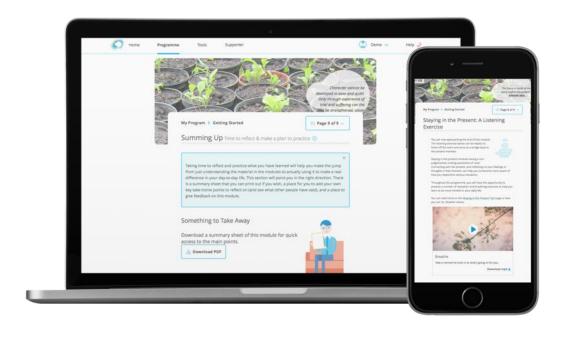
#### Internet-delivered CBT

#### Internet-delivered CBT

There have been really positive moves to increase access to evidence-based psychological therapy for anxiety and depression.

To really help as many people as possible, we need creative solutions that fit into modern life and the ways in which people want to access support.

As technology becomes ever more part of our daily lives, it is important we have treatments that bring CBT to even more people who can benefit, in ways that they want to access it.



**Internet-delivered cognitive behavior therapy (iCBT)** is a method for the dissemination of CBT.



#### History and Research



Mid-late 90s multiple researchers began to comment on **the potential uses of the internet for CBT** (Riley & Veale, 1999)

**Issac Marks - one of the first pioneers** of recognising the potential of computers to increase access to CBT (Marks et al, 2008)

Andrews et al (2010) in their meta-analysis of 22 studies concluded that cCBT for anxiety and depressive disorders, especially via the internet, has the capacity to provide effective acceptable and practical health care

1999

2008

2010

# History & Research



#### History and Research



RAND EUROPE

## Review of computerised cognitive behavioural therapies

Products and outcomes for people with mental health needs

Joanna Hofman, Alexandra Pollitt, Miriam Broeks, Katherine Stewart, Christian van Stolk Richards & Richardson meta-analysis - 19 studies of cCBT for depression. Therapist-supported studies (d=0.78), administrative-supported studies (d=0.58); no support size (d=0.36).

**RAND review** of available cCBT products and their outcomes by Hofman et al (2016) provided a systematic assessment of cCBT platforms.

Wright, Owen, Richards, et al., 2019 40 studies revealed an overall estimated post-treatment ES g = 0.502 and at follow-up with 21 studies an ES g = 0.29. Therapist-supported studies (g = 0.673) and studies with no support size (g = 0.239).

2012

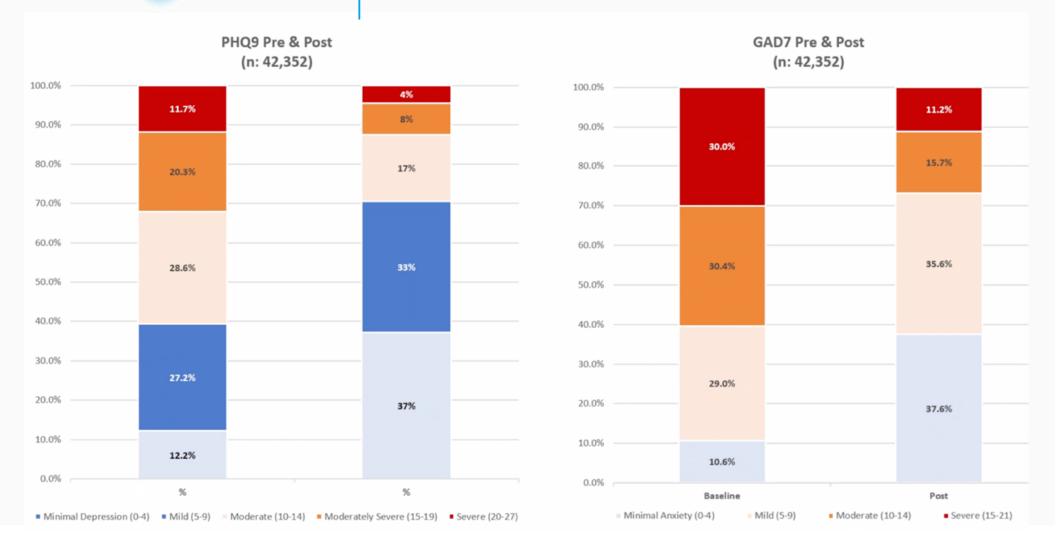
2016

2019

Interventions are effective and cost-effective



#### Real world outcomes





# STUDENTS AND DIGITAL WORLDS