


Further beyond the pill

Duncan Arbour – Syneos Health

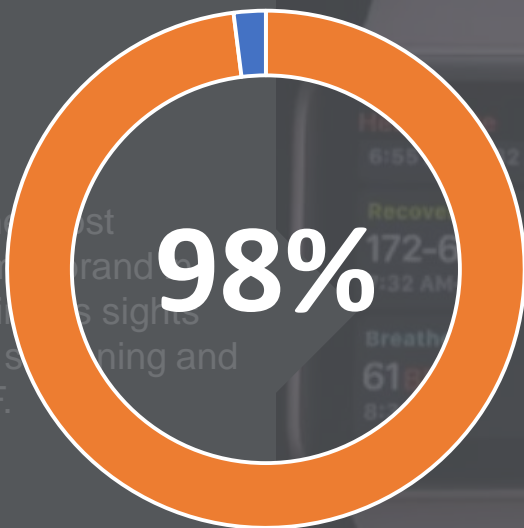
Presented by 

In the last twelve months the speaker has undertaken paid consultancy work for the following organisations:

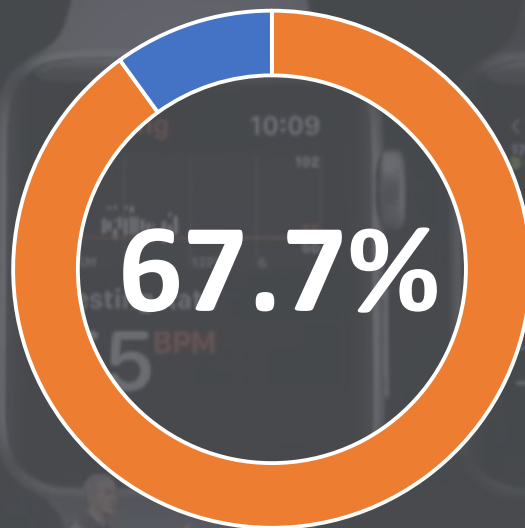
- AbbVie
- Bayer
- Celgene
- Eli Lilly
- Novo Nordisk
- Pfizer
- UCB

Everyone will tell you that healthcare lags behind other sectors in terms of the speed and velocity of its digital transformation.





**Cardioversion cohort
sensitivity; specificity 92%**



**Ambulatory cohort
sensitivity; specificity 67.6%**

But right now, the most valuable consumer brand in the world is setting its sights on transforming sleep tracking and monitoring of AF.

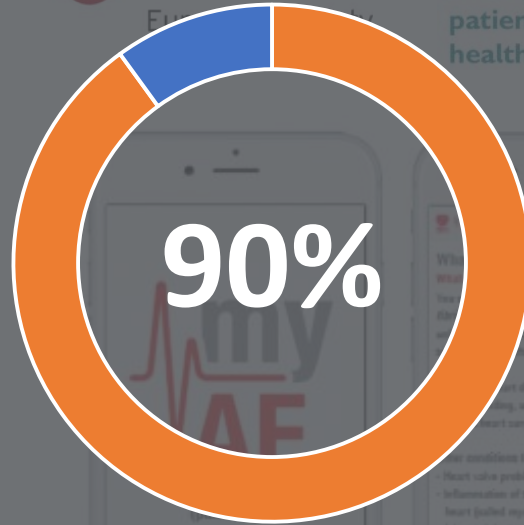
Over the last decade, devices for cardio monitoring have increasingly converged with ubiquitous consumer technology.







European Society of Cardiology
smartphone and tablet applications for
patients with atrial fibrillation and their
health care providers



There is an increasing body of evidence supporting the value of app-based services for patients with AF, and in October last year ESC launched its first apps.

Agreed mAF app was easy, user friendly and associated with significant improvements in knowledge compared with the usual care arm.

There are already over 8.4 billion 'things' on the Internet of Things. The Internet of Things accounts for 10% of the total percentage of these.

INTERNET OF US

By 2020, the average person will have more conversations with virtual assistants than they do with their spouse or partner.



Artificial Intelligence

AI is changing the way that we work:

800 million jobs worldwide to be taken by automation between now and 2030.



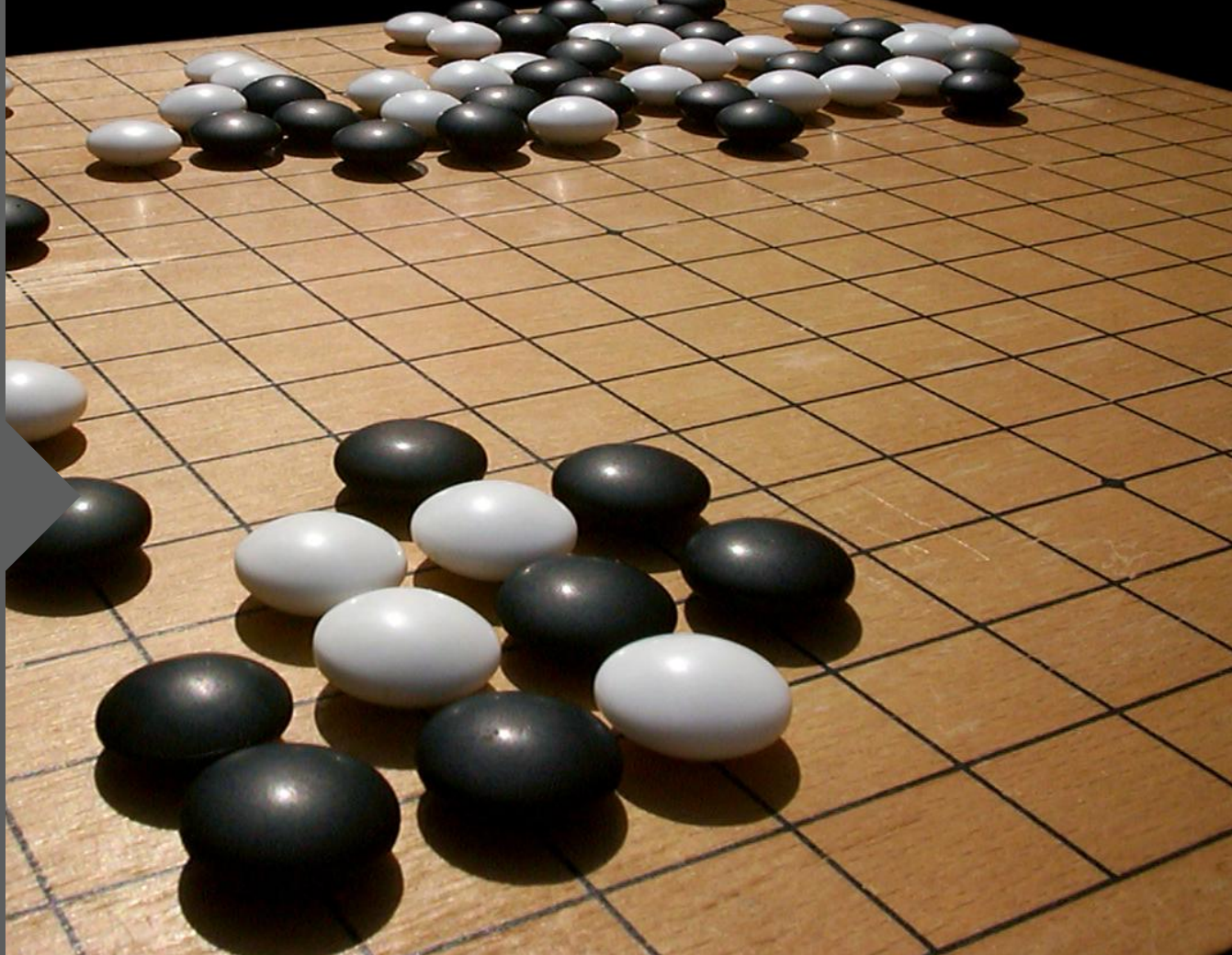
AI is changing the way that we play:

Artificial intelligence reigns supreme in Chess, the great strategy game of Western culture.



AI is changing the way that we play:

Artificial intelligence has beaten grandmasters in Go, the great strategy game of Chinese culture.



AI is changing the way that we play:

Artificial intelligence has even beaten human contestants in quiz shows, the great strategy game of American culture.



Changing the very way we get from A to B:

Predictions of up to 10 million self-driving cars on the roads within the next three years.



But nowhere is artificial intelligence a hotter topic than in our industry – healthcare, where the value of AI is anticipated to reach \$6.6bn in two years.



\$6.6bn

“

A WORLD MOSTLY WITHOUT DOCTORS (AT LEAST AVERAGE ONES)
IS NOT ONLY REASONABLE, BUT ALSO MORE LIKELY THAN NOT.

- VINOD KHOSLA

”

“If you work as a radiologist,
you’re like Wile E. Coyote in
the cartoon...”



“You’re already over the edge of the cliff, but you haven’t yet looked down. There’s no ground underneath.”

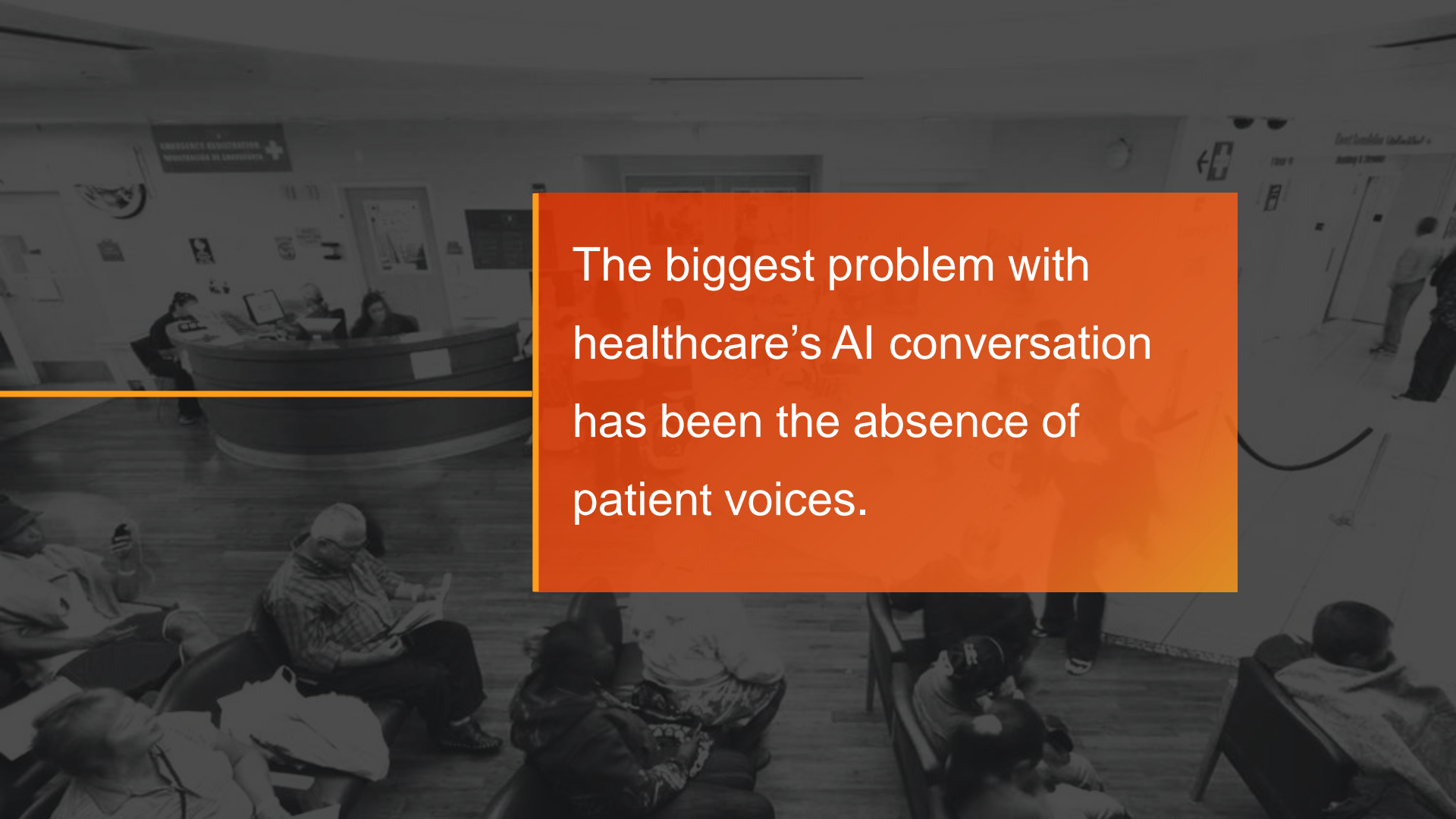




Not a realistic (short term) vision

Drivers haven't been replaced, but they've been augmented: cruise control; automatic parking; GPS and route finding.



A grayscale photograph of a hospital lobby. In the background, there is a curved reception desk with several staff members. A sign above the desk reads "EMERGENCY REGISTRATION" and "RENOUVEAU DE LAISSER-PASSER". To the right, there are directional signs for "EXIT" and "EMERGENCY". In the foreground, several people are sitting in chairs, some looking at papers or mobile devices. The overall scene is a busy, waiting area in a healthcare facility.

The biggest problem with
healthcare's AI conversation
has been the absence of
patient voices.

Surveying the needs, wants, hopes and fears of 800 patients and 200 caregivers across the EU5 and USA, including A-Fib 127 patients with A-Fib.

Survey methodology



Self-reported online panel methodology, fielded Oct-Nov 2017

Global distribution



127 people with atrial fibrillation, 85 from EU5, 42 from North America

Patient profile

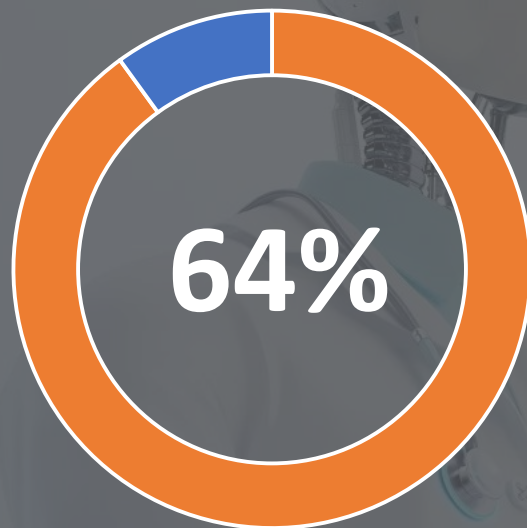


Average age of patients: 67



99 male
28 female

Patients show little enthusiasm for artificial intelligence displacing their relationships with physicians. Fewer than one in five see benefit in receiving diagnosis or treatment recommendation via algorithm.



Of EU A-fib patients are comfortable with the idea of a 'virtual nursing assistant' providing ongoing support and monitoring for general health or a specific medication



A “realistic” voice and a tone more warm and empathetic than factual.





“We always overestimate the change that will occur in the next two years and underestimate the change that will occur in the next ten. Don't let yourself be lulled into inaction.”

