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The Latest Developments Driving the Transformation of Care

## THIS WEEK



### The age of consumer empowerment begins in earnest

Now that the holidays are over, 'tis the season for health care forecasts, outlooks and predictions. And while leading research, data and consulting firms each have their unique insights about what's in store for health care this year, some key themes have emerged, many of which center around consumer empowerment. Here's a sampling of what caught our eye.

#### **Consumers will leverage their data like never before**

The PwC Health Research Institute's "[Top Health Industry Issues of 2020](#)" report notes that do-it-yourself health care consumers will be more assertive this year as they reap the benefits of the huge investments that have been made in data collection, storage and analysis.

The rise of companies with business models centered on giving consumers greater access to their own data and providing insights based on those data will help many consumers become more involved in their own care. By connecting electronic health records, claims data, lab work and other information, consumers will get a clearer picture of their overall health and where it may be headed.

PwC's team notes that as companies use data to help consumers make smarter clinical and financial decisions about their care, Americans are gaining greater levels of control over their personal health information. This could leave provider organizations feeling pressured by both consumers and startup companies seeking to share more data that can advance consumer decision-making.

Many hurdles still need to be cleared as we begin to see the full potential for data to disrupt health care, the PwC report notes. These include things like poor data reliability, data protection and privacy regulations, an inability to adequately protect and secure data and a lack of analytical talent. But make no mistake, consumers will have greater leverage this year and beyond in accessing and using their data to shape their care decisions, cut costs and improve their health.

### **Consumers expect prevention, well-being to be a greater focus**

Deloitte's 2020 "[Global Health Care Outlook](#)" notes that greater consumer engagement and empowerment will drive care model changes this year.

Deloitte officials believe care model innovation will accelerate this year and beyond to meet consumers' expectations, with greater focus on prevention and well-being and less on treatment. Greater attention will need to be paid to solving the challenges of unequal access, capacity, capability and affordability.

Provider organizations, health plans, government payers and others in the health care ecosystem will need to draw closer together to develop strategies and make investments in new care models and technologies that address the drivers of health, enable early diagnoses and monitor response to treatment, the report states.

This might be accomplished by having hospital and health system leaders who now compete for patients in a specific region collaborate to find ways to keep community members healthy and out of the hospital — something more and more leading provider organizations are doing. Health plan leaders could help drive meaningful and sustainable change by developing new coverage models that emphasize health and well-being rather than provider networks.

The report also notes that developing an enterprise-wide virtual health strategy will help ensure that investments address short-term goals and allow for future expansion, while optimizing the impact on patient engagement, affordability, transformation and patient care.

### **Be prepared for the empowered 2020 health care consumer**

As Reenita Das, partner and senior vice president of health care and life sciences at Frost & Sullivan, recently pointed out in [Forbes](#), the "retailization" of health care is largely being driven by

empowered patients. In 2020, this trend will be more pronounced as consumers have greater access to information.

Das believes the digitization of products, services and business models is democratizing current health care systems, fueling the comparison-shopping consumer mindset. She expects to see new and expanded offerings in the retail pharmacy space from companies like CVS Health, Walgreens and Walmart, in the retail sector from companies like Costco and Best Buy, and in the digital marketplace from companies like Amazon and Ali Health.

Will you be ready for these changes and challenges? These AHA resources can assist you as you evaluate your strategy for 2020 and beyond:

[“2020 Environmental Scan”](#): This resource provides an overview of the trends, statistics and economic forecasts likely to affect patients and providers at every level of care. Topics include workforce issues, health (including social determinants, behavioral health and aging), innovation, affordability and value, and more.

[“Futurescan 2020-2025: Health Care Trends and Implications”](#): This report provides expertise and perspectives from thought leaders in the field on such issues as disruptive innovation, the changing face of strategic health care partnerships, building a resilient health care organization and more.

## **ALPHABET’S VERILY, WALGREENS HIRE NEW CLINICAL LEADERS**

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Two major players working to disrupt health rang in the new year by hiring prominent leaders to head their clinical operations.

Alphabet, the parent company of Verily Life Sciences (formerly Google Life Sciences), has hired Vindell Washington, M.D., formerly of the Office of the National Coordinator for Health Information Technology, to serve as chief clinical officer. Washington previously served as the national coordinator for health IT at ONC from August 2016 to January 2017, [Fierce Healthcare reports](#). Washington also worked at the Franciscan Missionaries of Our Lady Health System in Baton Rouge, La., leaving as president of its medical group. Verily also recently hired Deepak Ahuja, a former Tesla executive who helped take the company public, as its chief financial officer.

Walgreens, meanwhile, has hired Kevin Ban, M.D., as its chief medical officer. Ban, who has more than 20 years of clinical experience, held the same position at athenahealth. At Walgreens, Ban will oversee Walgreens’ clinical programs, patient safety and health care information systems.

Ban joins Walgreens as the company works to reconfigure its clinical services, including building partnerships with Jenny Craig and LabCorp to offer meal-planning services and lab testing at its stores.

We want to hear from you! Please send your feedback to Bob Kehoe at [rkehoe@aha.org](mailto:rkehoe@aha.org).



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