

How
leading
firms are
disrupting
health
care

DISRUPTION IN HEALTH CARE



AHA CENTER FOR HEALTH
INNOVATION

MARKET INSIGHTS

Some of America's largest companies have made it their business to disrupt health care. And in 2019, six firms — **Amazon, Apple, CVS Health/Aetna, Google/Alphabet, Walgreens and Walmart** — took significant steps to improve efficiency and make high-quality care more accessible. The moves they made are significant not because of their scale or size, but because they appear to be early indicators of the companies' longer-term ambitions in health care. The ramifications of these moves are likely to be felt in 2020 and beyond.

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2020 FORESIGHT

Keep an eye on whether Amazon expands insurance offerings to its vast customer base or develops an Amazon Prime health care program.



Amazon's moves hint at future strategy

1 RESHAPING HEALTH INSURANCE: Amazon began offering new [health plans](#) for 2020 to its workers in Connecticut, North Carolina, Utah and Wisconsin. The new plans were developed under the joint venture Haven Healthcare, which Amazon is funding, along with JPMorgan Chase and Berkshire Hathaway, in an effort to cut health costs and improve quality.

2 DRAWING CLOSER TO CONSUMERS: In its first major health care company acquisition since buying PillPack, Amazon purchased online symptom checker [Health Navigator](#). The company offers online tools to help consumers check symptoms to help with remote diagnoses and locate the most appropriate care setting. Amazon plans to offer Health Navigator to employees as part of its Amazon Care clinics.

3 VIRTUAL CARE PILOT LAUNCHES: [Amazon Care](#), a virtual primary care pilot program, gave some of Amazon's Seattle area employees and their families quicker access to care without the need for appointments. Many see the pilot

as a precursor to a much larger rollout that eventually could be offered to all Amazon employees and perhaps customers.

4 A MACHINE LEARNING MOVE: Amazon rolled out its [Textract](#) machine-learning service, which automatically extracts selected text and data from documents like insurance claims and medical charts. The service uses artificial intelligence (AI) to identify text or data without clinician intervention.

5 BETTING ON BLOCKCHAIN: [Amazon Managed Blockchain](#), a service that enables health care organizations and those in other fields to create and manage scalable blockchain networks, launched in May. The service helps create and manage secure blockchain networks that can scale to support thousands of applications running millions of transactions. ●



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2020 FORESIGHT

As Apple gathers experience and data from its current studies, it may gain a significant market advantage for its personalized Apple Watch device and apps.

Apple expands consumer access to health records

1 MAKING HEALTH RECORDS MORE ACCESSIBLE: After achieving promising results in a study with UC San Diego Health Apple Health Records users, Apple gave nearly 5 million University of California Health network patients the ability to download their medical data onto their Apple smartphones. The patients now can access medications, lab results and other vital information from third-party apps like those that monitor glucose and track fertility. Working with the Department of Veterans Affairs, Apple also began offering millions of U.S. veterans the ability to access their health records through the tech giant's health records feature on the iPhone. More than 400 provider organizations, laboratory networks and electronic health records (EHRs) vendors now use the iPhone's health records feature.

2 PERSONALIZING THE APPLE WATCH APP: Apple teamed with Aetna to develop a personal Apple Watch app designed to help improve the health and well-being of Aetna members. The Attain app lets users set personalized goals, track activity levels and recommends healthy behaviors and actions.

3 NEW RESEARCH APP LAUNCHES: Working with leading medical institutions, Apple launched a new health research app that allows Apple Watch users to volunteer to provide health-related data collected by both the Watch and the Apple Health app. Apple began three health studies to examine whether the Apple Watch can monitor hearing, women's health, heart health and mobility. ●



2020 FORESIGHT

With its acquisition of Aetna now complete, CVS Health will become a much more powerful force in disrupting health care.



CVS Health transforms consumer experience

1 BETTING BIG ON HealthHUBS: After piloting three HealthHUB locations in Houston, [CVS Health](#) announced it would expand the concept to 1,500 of its stores across the U.S. within three years. HealthHUB locations dedicate more than 20% of stores to health services that include durable medical equipment, supplies and various new product and service combinations.

2 AN EARLY STEP INTO IN-HOME DIALYSIS: CVS Health in July announced plans for a [clinical trial](#) of its new home dialysis system. CVS' HemoCare Hemodialysis system trial for the administration of home hemodialysis will involve up to 70 patients at 10 sites.

3 SPECIAL DELIVERY: In a move many considered a response to Amazon Prime and the company's acquisition of PillPack, CVS Health expanded its [CarePass](#) program nationwide. The CarePass program benefits include free one- or two-day delivery on most prescription medications and purchases and a

discount on CVS Health brand products, plus access to a 24/7 pharmacist helpline.

4 ADDRESSING SOCIAL DETERMINANTS: CVS Health and the Aetna Foundation expanded their work on [social determinants of health](#) by leveraging CVS' Destination: Health platform. The initiative with the Aetna Foundation includes new partnerships, tools and investments designed to address social factors that have a negative impact on health. In one move, Aetna is teaming with Unite Us, a social care coordination platform, to increase access to social supports for dual-eligible members. The companies also are exploring other ways to integrate their platforms, including potentially in CVS Health retail clinics. ●



2020 FORESIGHT

Google's partnerships with providers and other health care organizations bear watching as HIPAA challenges emerge over how patient data are used.



Google partners with providers to expand into health care

1 A DIGITAL DIAGNOSTICS PARTNERSHIP: Mayo Clinic in Rochester, Minn., entered into a 10-year strategic partnership with Google to have the tech giant streamline its digital operations. The organizations are trying to spur new innovations for care delivery at the health system and beyond. Mayo will leverage Google's AI and machine-learning capabilities to advance its digital diagnostics, augment its ability to conduct medical research, and improve treatment precision and clinical outcomes.

2 ACQUIRING FITBIT: Alphabet, the parent company of Google, announced that it would buy wearable fitness activity tracker maker Fitbit for \$2.1 billion. Fitbit founder and CEO James Park said that with Google's resources and platform, his company would be able to accelerate innovation in wearable devices, scale faster and make health more accessible to everyone.

3 AN AI-POWERED PARTNERSHIP: Suki, a voice-enabled digital assistant powered with AI, began a partnership with Google's cloud computing business that will help the startup rapidly expand its use cases from clinical documentation to include data queries, ordering, prescribing and billing. This could help free up physicians to focus more on direct patient care. Google will integrate Suki into its Cloud Partner Advantage Program, giving the startup access to the cloud computing division's tech and AI services.

4 BUILDING A PREDICTIVE ANALYTICS PLATFORM: Google applied for a patent for a deep-learning system that aggregates EHR data into a timeline that can be used to predict potential adverse events. The system consists of three parts: a computer memory bank that can aggregate EHR data from vast numbers of patients; a computer that executes deep learning on those records in a standardized data structure format; and a clinical interface that displays relevant facts from a patient's history and predicts future clinical events. ●





2020 FORESIGHT

With a growing number of financial challenges, 2020 will be a pivotal year in determining whether Walgreens can be key health care disruptor going forward.

Walgreens reshapes its health care strategy

1 STRATEGY SHIFTS FOR IN-STORE CLINICS: After garnering huge interest over its earlier move to enter the walk-in clinic business, Walgreens Boots Alliance in October said it would close nearly 160 of its in-store health clinics that the company ran itself, while keeping 220 clinics that are run by local health systems. The decision was seen as a cost-cutting move as the company continued to evaluate its health care strategy.

2 ESTABLISHING MEDICARE SERVICE CENTERS: In a new multiyear partnership, Walgreens Boots Alliance and UnitedHealth Group's health insurance unit said they would open 14 Medicare service centers inside Walgreens stores in five metropolitan areas in January 2020. The centers will enable customers to learn more about Medicare, meet with service advocates to discuss their UnitedHealth-care plan benefits and enroll in the plans. The payer's Medicare Advantage members also can make appointments for in-store annual wellness visits.

3 PARTNERING ON SENIOR CARE: Humana and Walgreens expanded their joint venture of delivering senior health clinics to more locations. The retailer and the payer made the decision after piloting a program in the Kansas City market. The expansion includes three more Partners in Primary Care centers in Walgreens stores, each staffed by a board-certified physician and supported by care teams that include registered nurse "care coaches," behavioral health specialists and social workers.

4 EXPANDING ITS DIGITAL MARKETPLACE: Walgreens expanded its Find Care digital marketplace with new tools from Propeller Health and Dexcom to help individuals manage respiratory and metabolic diseases. Walgreens customers now can sign up to receive Dexcom G6 CGM and Propeller's inhaler sensor that tracks medication usage and can warn users of a high-sensitivity event through the company's mobile app. ●



2020 FORESIGHT

Keep tabs on Walmart's success with its initial health center store and whether it opts for a national rollout of this concept.

Walmart drives market-changing access to care

1 MAKING ACCESS TO CARE EASIER AND MORE TRANSPARENT: Walmart made it easier for consumers to make primary care, dental and behavioral health appointments by launching a digital health care site. The [site](#) also allows patients to make appointments for hearing tests and immunizations. The site provides real-time price transparency for all services offered.

2 SLASHING PRICES ON TELEHEALTH VISITS: Trying to spur greater use of telemedicine services by its employees, Walmart in March rolled back the prices of [virtual care visits](#) from \$40 to \$4 for the 1 million people enrolled in its Associate Benefits plan. Virtual visits provided via the Doctor on Demand app are covered the same as a normal office visit.

3 FIRST STAND-ALONE HEALTH CENTER OPENS: Walmart opened its first 10,000-square-foot [Walmart Health center](#) in Dallas, featuring an array of primary medical services, dental care and behavioral health services in partnership with local providers. Customers can access such services as primary care, lab, X-ray and EKG, counseling, dental, optical, hearing, community health (nutrition, fitness) and health insurance education. Walmart Health plans to open another center in Calhoun, Ga., and is evaluating whether to make it a national rollout. ●