



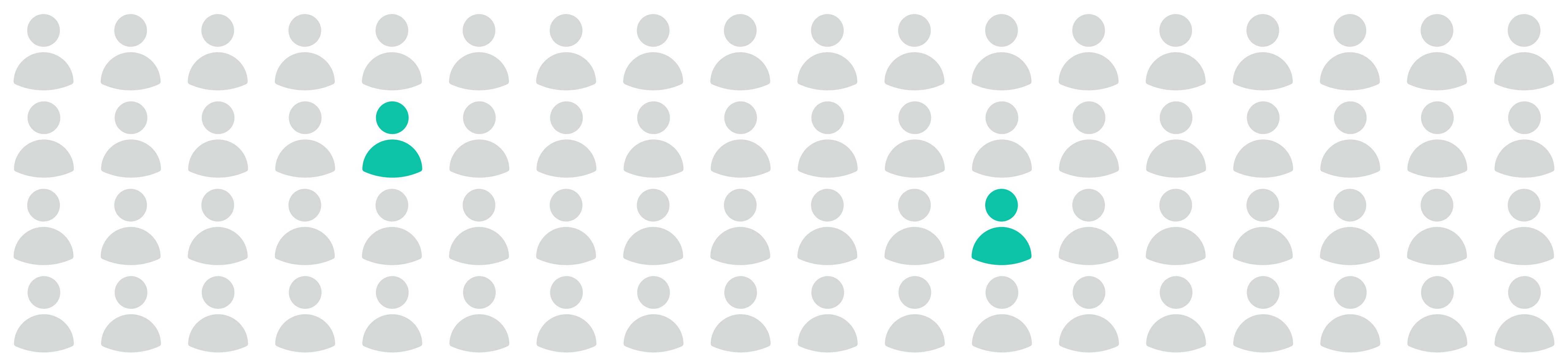
Northwestern University

Improving the Visibility of Amazon Health Services

A New Way for Parents to Search for Care

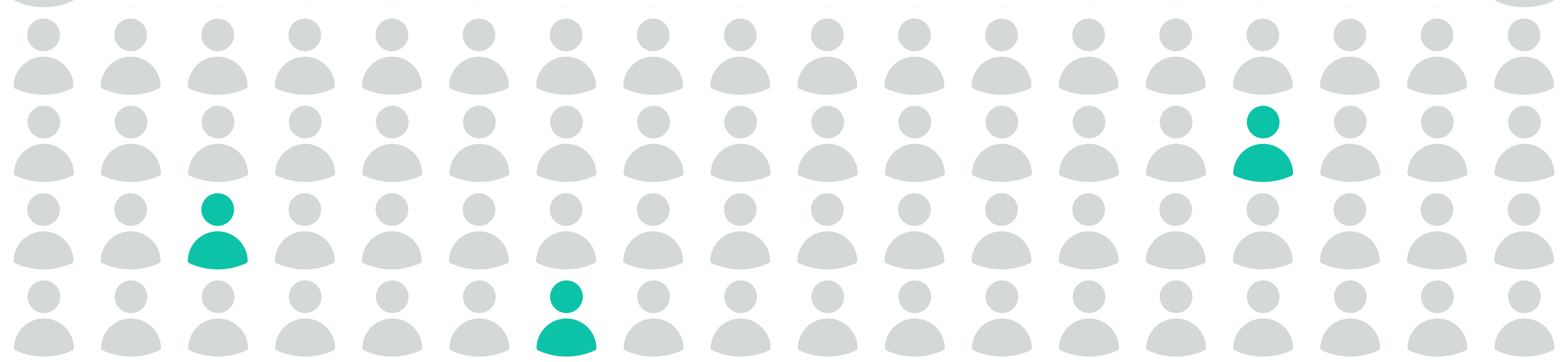
The image features a grid of teal-colored person icons, each consisting of a circular head and a rounded, trapezoidal body. The icons are arranged in a 10x18 grid. In the center of the grid, the text "Everyone knows Amazon." is displayed in a black, sans-serif font. The text is positioned between the 5th and 6th rows and the 6th and 7th columns. The grid is composed of 180 icons in total, with the central text area being empty of icons.

Everyone **knows** Amazon.



But not everyone knows Amazon Health Services.

or what it offers. or how it can redefine the way they get healthcare.



The current journey is fragmented.



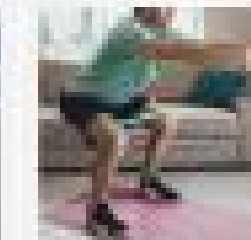
Virtual Health Clinic

Under \$25 [See more](#)



\$25

Online physical therapy for back pain



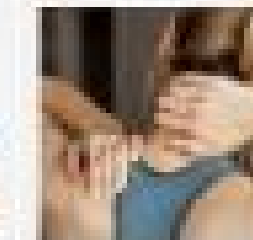
\$25

Personalized online physical therapy



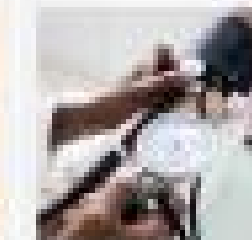
\$25

Online physical therapy for neck pain



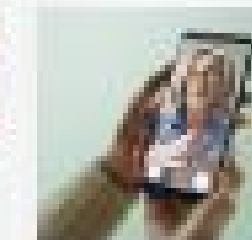
\$25

Online physical therapy for neck pain



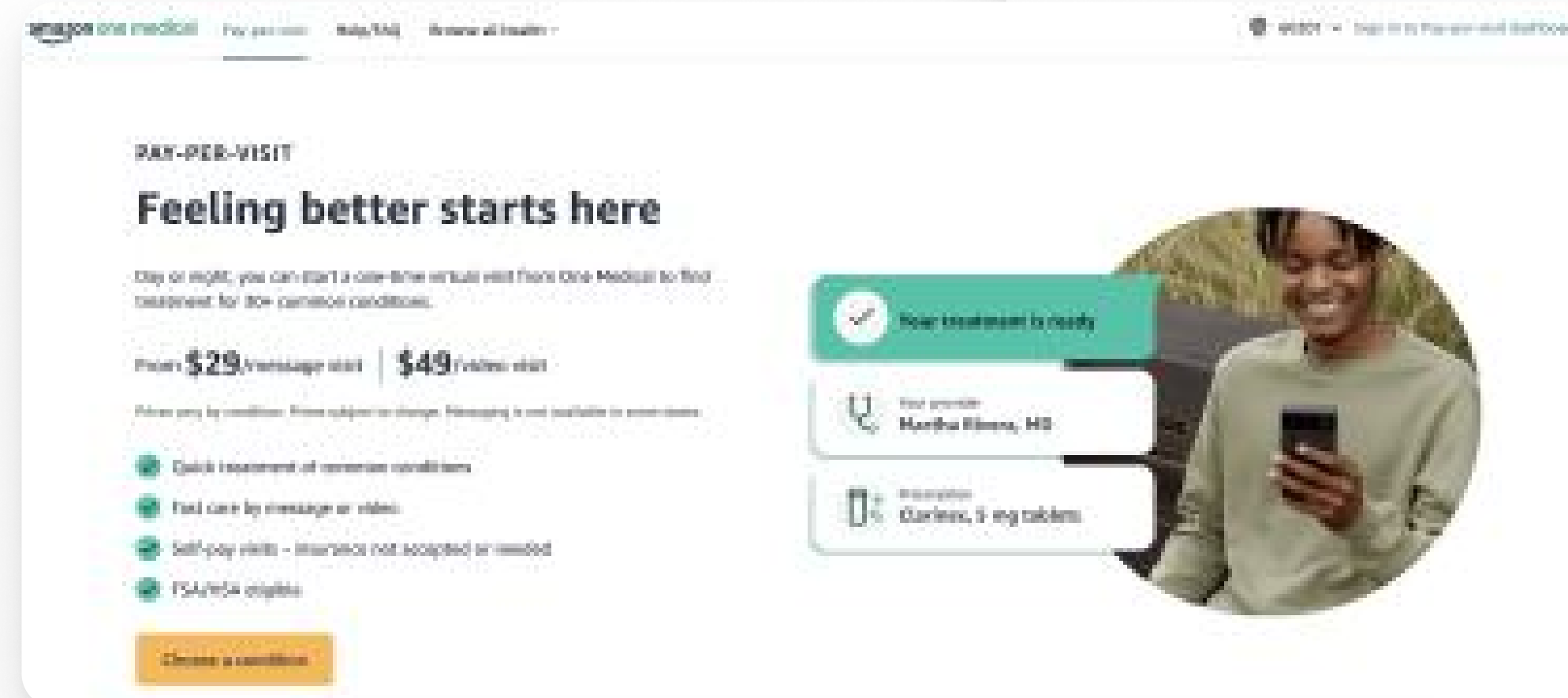
\$25

Get a health coach to help you manage high blood



\$25

Support for better sleep through online therapy



“

It was so horrifying to see how there are **so many scary things that can wrong...**

“

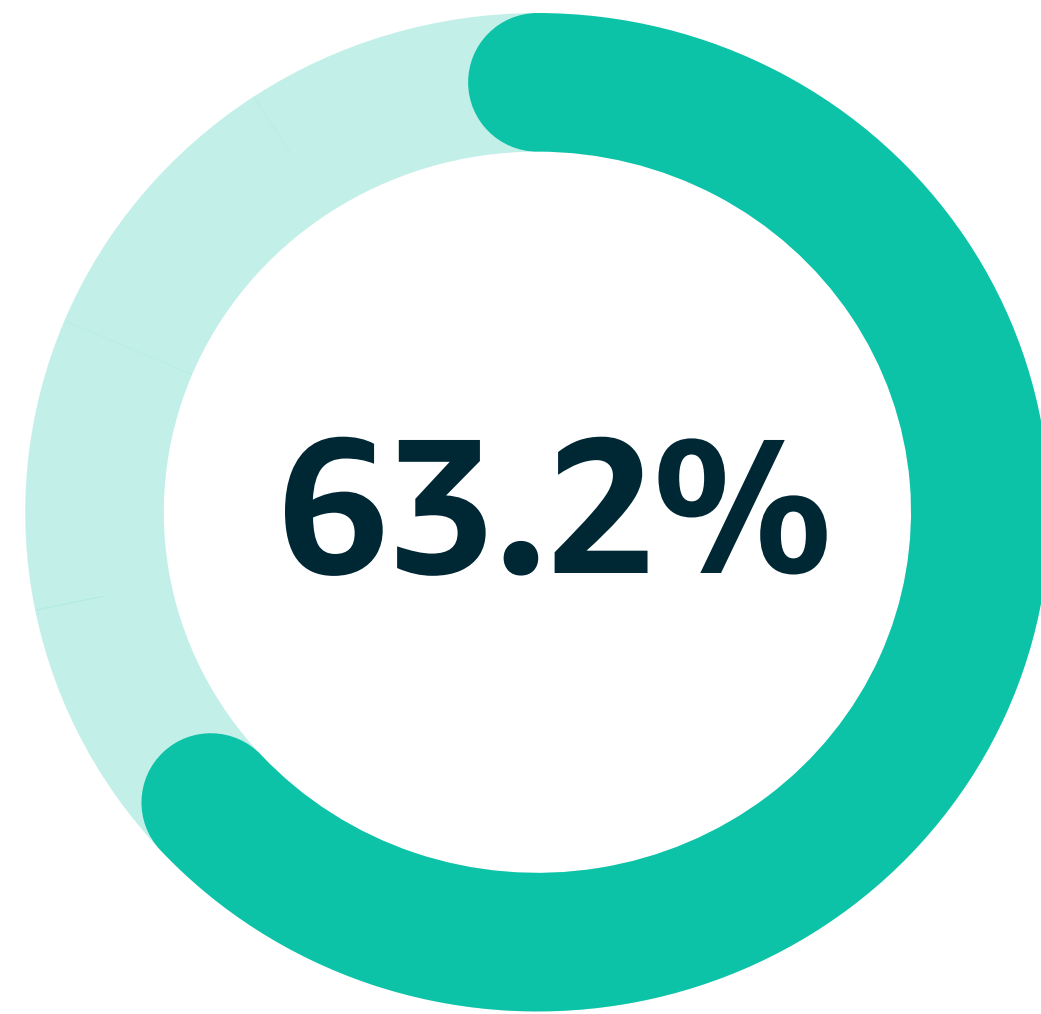
There is almost a plethora of advice that **it is hard to know which is right or the best.**

“

Becoming a parent makes you think about the future and become more **conscious about your health and health of your family...**



The Ideal Healthcare Experience



**of respondents wanted more
personalized options**

Top priorities when accessing healthcare
during the parenthood journey:

77.3%

Trusted providers

59.1%

Convenience



How might we support parents as they **discover, understand, afford, and continue** using Amazon Health Services?

Objectives & Key Results

Objectives	Maximize parent* use of health benefits to purchase discounted goods and services	Seamlessly integrate retail shopping and Amazon Health Services use for parents	Position Amazon Health Services as the top choice throughout parenthood
Outcomes	Increase average parent savings across Amazon Health Services by 15% Increase use of Prime-discounted One Medical memberships among parents by 5%	Implement intuitive search experience within Amazon retail to showcase health services by Q3 Increase CTR from Amazon retail to AHS by 7% Onboard 15% of parents on Amazon Retail to Amazon Health Services by Q4	Achieve 10% increase in first-time Amazon Pharmacy parent users by EOY Increase One Medical enrollment for parents within the window of 1 year before and after birth by 20% YoY Retain 70% of parents YoY on One Medical after first year membership

* parents are defined as Amazon users with purchasing history of prenatal, pregnancy, and baby products

Our Product

A New Way to Search for Care

Product Vision



Reduce **confusion and stress** when navigating healthcare services during pregnancy and early parenthood



Support prospective, expecting, and current parents with a **seamless, convenient health service experience** across all stages



Boost **trust**, emphasize **ease of use**, and provide **proactive care** through Amazon Health Services



User Journey

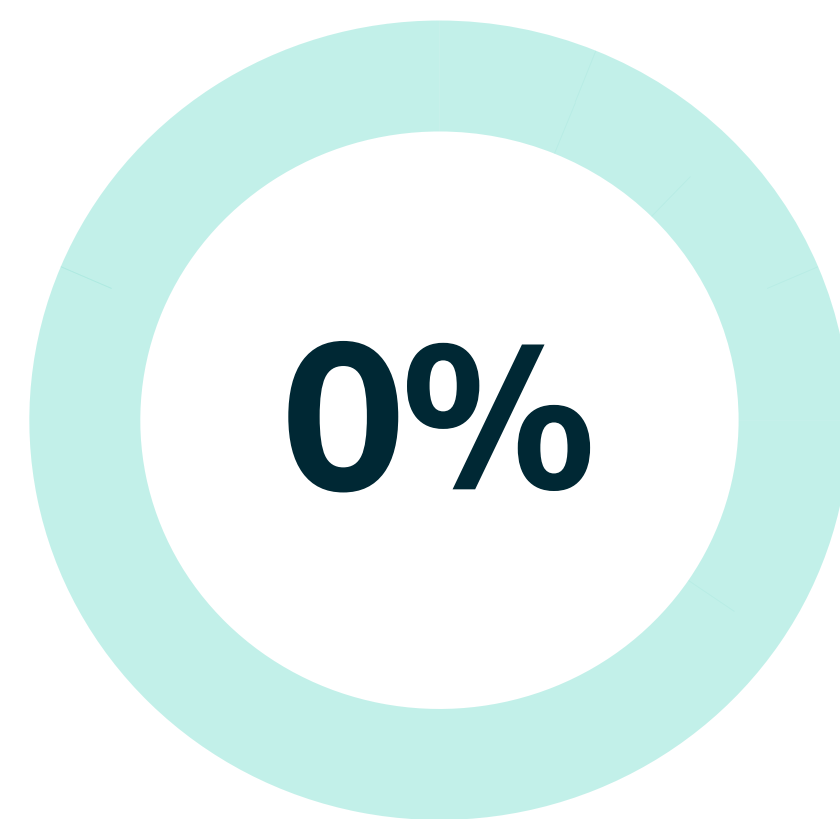
Entry

Find | Choose | Engage

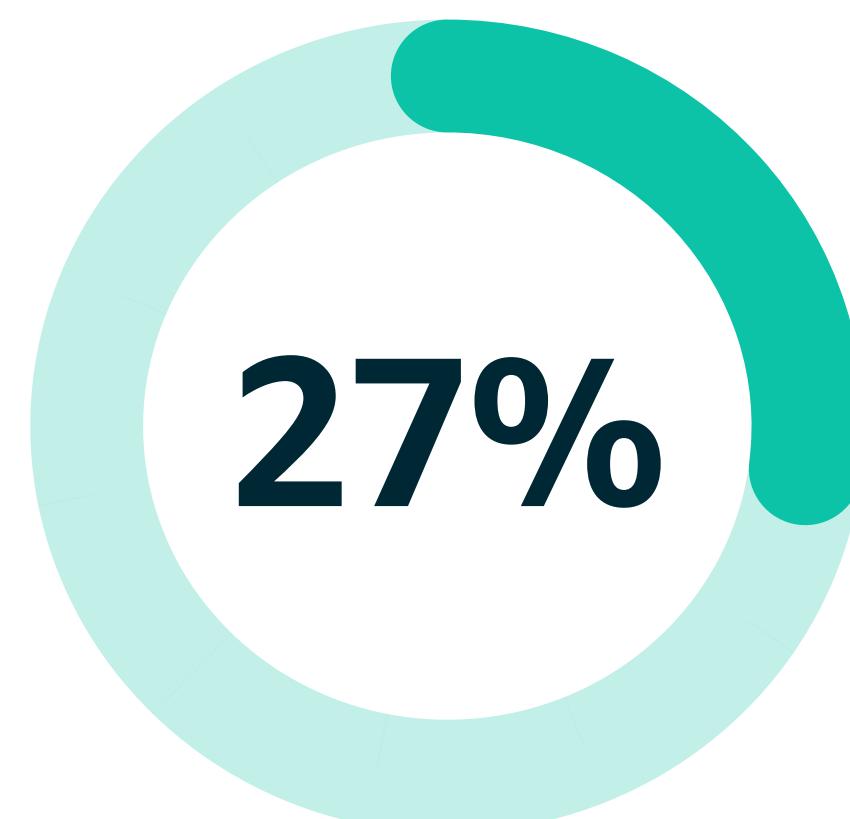
*Seamlessly integrate retail shopping and Amazon
Health Services use for parents*

Lack of awareness

Most users were unfamiliar with AHS and initially unsure what “Healthcare Services” actually includes



of users have used AHS



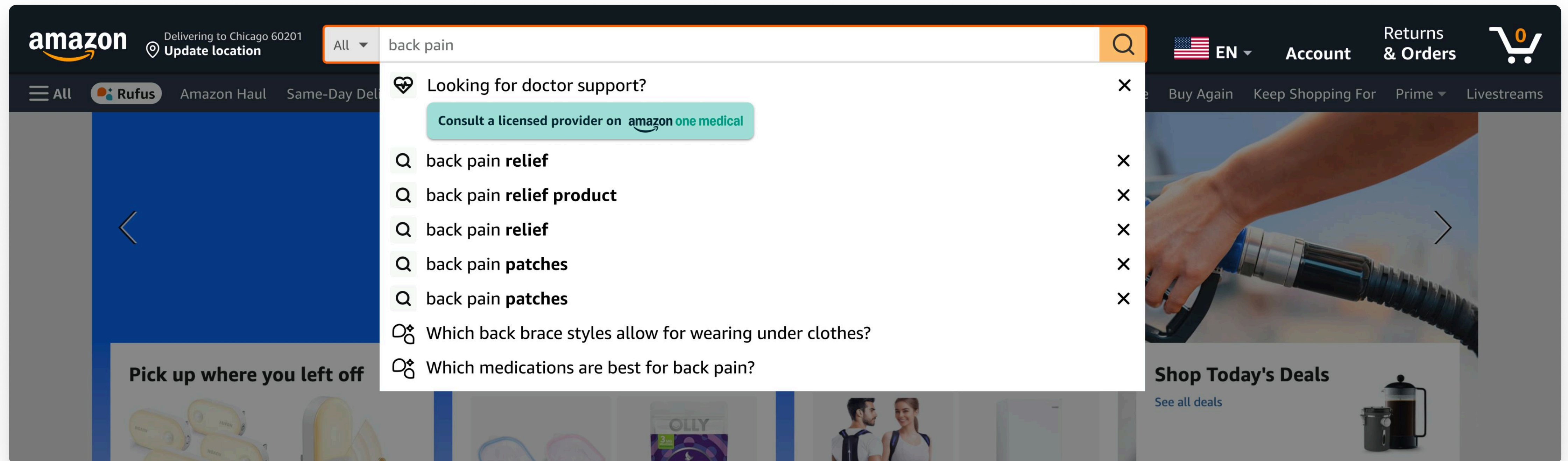
of users have heard of AHS

“

I'm assuming healthcare services is just the online and in-person services, but I'm not sure if that's alluding to something else because this verbiage isn't clear.

Search Bar CTA

Introduces healthcare services at the beginning of the retail experience





**Average score for helpfulness
of search bar CTA**

“

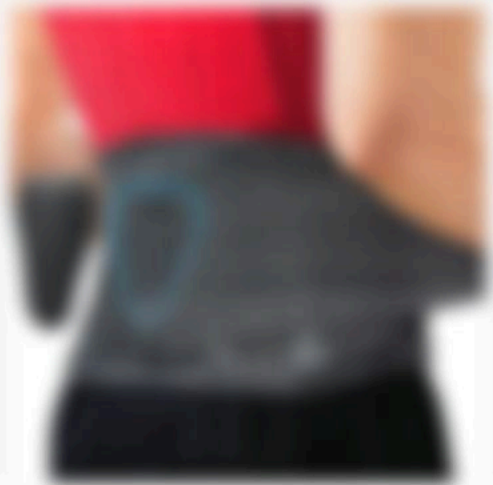
Searching was extremely easy. I liked having a distinct call-to-action button...made it really straightforward.

Search Results CTA

An alternate entry point after clicking “search”

Results

From our website page for other buying options. View and select items you are interested in.



Back Brace For Lower Back Pain - Immediate Relief From Strain, Herniated Disc, Sciatica - Breathable Design

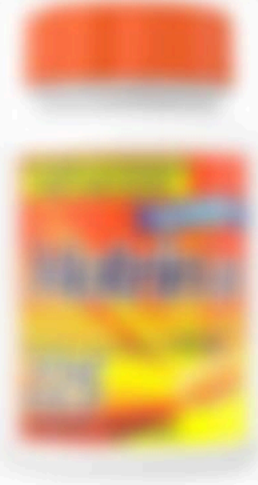
4.5 out of 5 stars (1,234 reviews)

16" Size

Amazon's Choice

FREE delivery Tomorrow May 10

10% off with Prime



Medicine Bottle Dispenser - 100ml, 500ml, 1000ml - BPA Free - Easy to Use

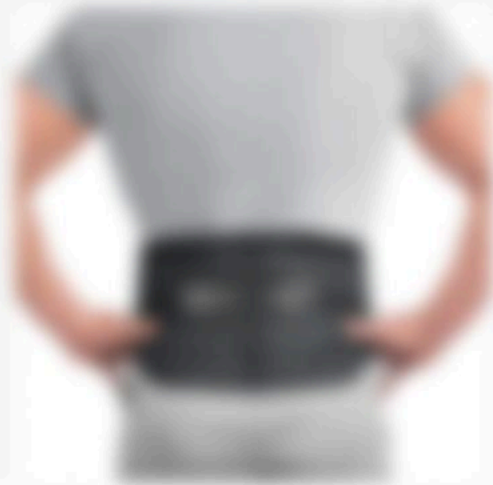
4.8 out of 5 stars (567 reviews)

16" Size

Amazon's Choice

FREE delivery Tomorrow May 10

10% off with Prime



Sports Medicine Adjustable Back Brace - Back Pain Relief Support For Men and Women, Ideal For Upper and Lower Back Pain

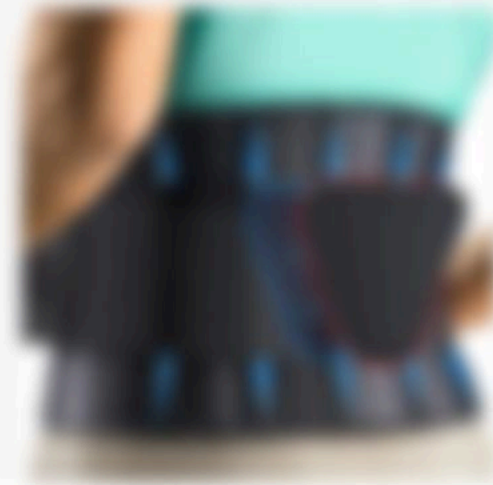
4.6 out of 5 stars (890 reviews)

20" Size

Amazon's Choice

FREE delivery Tomorrow May 10

10% off with Prime



Lightweight Back Brace For Lower Back Pain Under Clothing

4.7 out of 5 stars (1,567 reviews)

10" Size

Amazon's Choice

FREE delivery Tomorrow May 10

10% off with Prime



Looking for more care options?

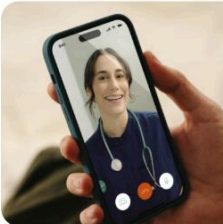
Learn more about **affordable, same-day** care available to you online and in person.



One Medical Membership

FREE for 14 days

For on-demand virtual care and ongoing support, free trial with Prime membership



Pay-per-visit

from \$10/visit

For fast and convenient virtual care (formerly Amazon Clinic)



Massage Gun Deep Tissue Back Massage For Athletes For Pain Relief, Recovery

4.9 out of 5 stars (2,345 reviews)

16" Size

Amazon's Choice

FREE delivery Tomorrow May 10

10% off with Prime



Back Brace For Lower Back Pain - Adjustable Lumbar Back Brace with Removable Pad

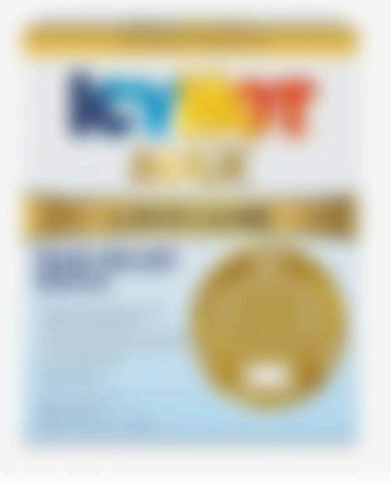
4.5 out of 5 stars (1,234 reviews)

16" Size

Amazon's Choice

FREE delivery Tomorrow May 10

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Medicine Bottle Dispenser - 100ml, 500ml, 1000ml - BPA Free - Easy to Use

4.8 out of 5 stars (567 reviews)

16" Size

Amazon's Choice

FREE delivery Tomorrow May 10

10% off with Prime



Medical Device - 100ml, 500ml, 1000ml - BPA Free - Easy to Use

4.8 out of 5 stars (567 reviews)

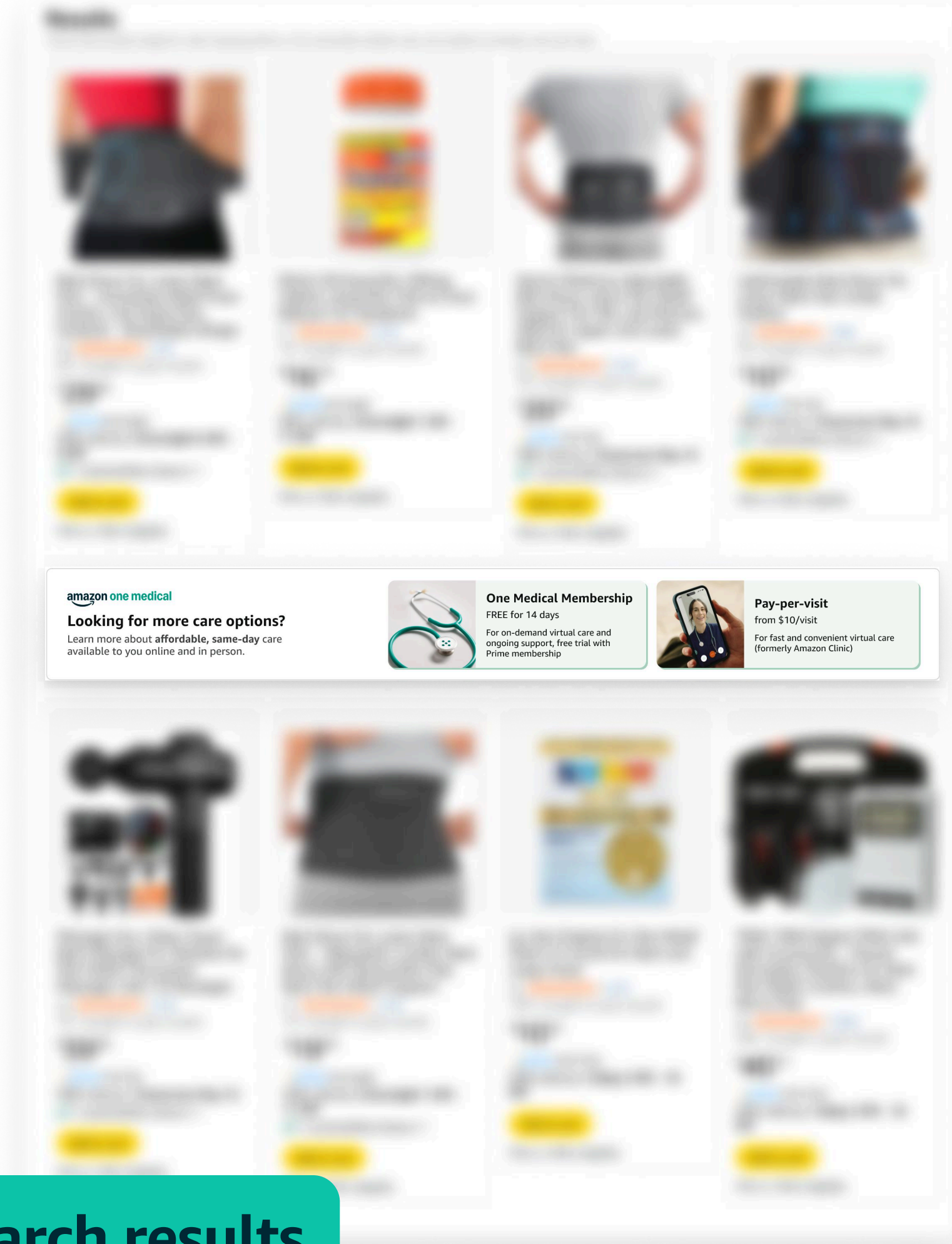
16" Size

Amazon's Choice

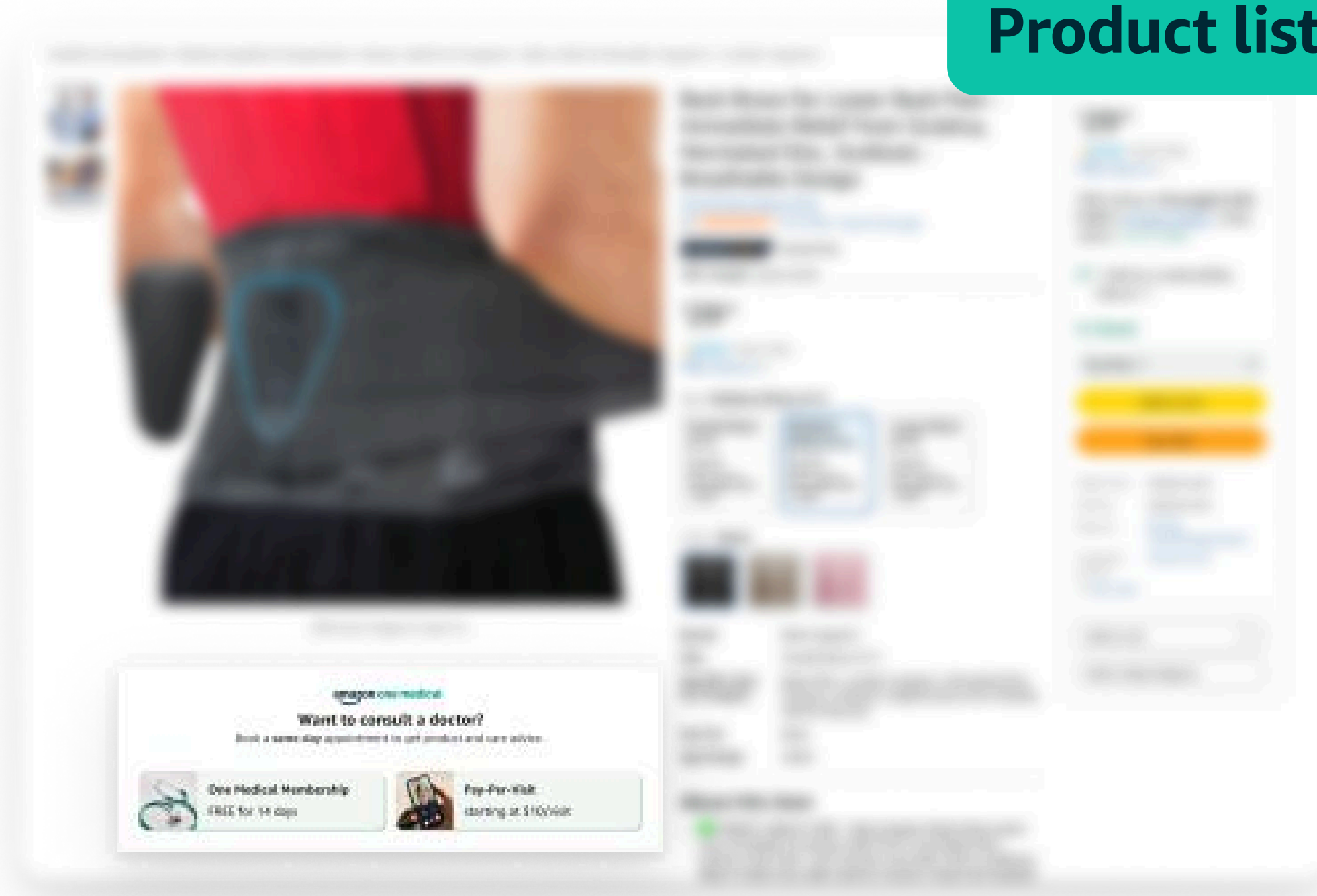
FREE delivery Tomorrow May 10

10% off with Prime

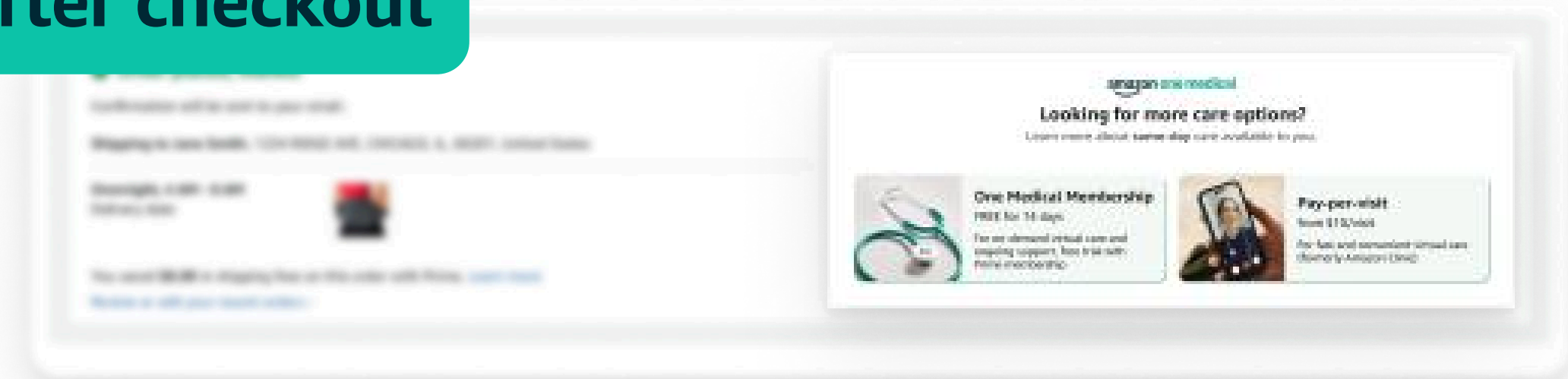
Product listing



Search results



After checkout



“

It's not just offering products. It's actually suggesting relief and a more permanent fix to healthcare.

“

[The banner] would influence me to do more research and consider exploring options like consulting a doctor.

Discovery

Find | Choose | Afford | Engage

*Maximize parent use of health benefits to
purchase discounted goods and services*

Healthcare Landing Page

Showcase & educate about care offerings

Symptom
overview

amazon Delivering to Chicago 60201 [Update location](#) All EN [Account](#) [Returns & Orders](#)

[All](#) [Rufus](#) [Amazon Haul](#) [Same-Day Delivery](#) [Medical Care](#) [Saks](#) [Groceries](#) [Amazon Basics](#) [Prime Video](#) [Baby](#) [Pharmacy](#) [Customer Service](#) [Buy Again](#) [Keep Shopping For](#) [Prime](#) [Livestreams](#)

Back Pain Care

Get care from Amazon healthcare professionals—plus products and prescriptions delivered to your door.
powered by **amazon one medical**

Overview

It's important to seek medical advice if your back pain is severe, persistent, or accompanied by other symptoms. Common solutions include improving posture, participating in gentle exercise, using a support pillow or brace, or applying hot and cold therapy.
How does Amazon Health Services generate responses? [Learn more](#)

Book an Appointment



Joint and back support

Back pain, Low back symptoms, Neck pain, Plantar fasciitis (heel pain), Pulled muscles, Sports injuries, Sprains, Tendonitis

Get **virtual or in-office care** same or next-day.

- ✓ Same or next/day appointments available
- ✓ Onsite labs
- ✓ Appointments that start ontime
- ✓ Most insurances in-network. [Check plans](#)

[Book an appointment](#)

Appointment
booking
information

Suggested health-related products



- ✓ Same or next/day appointments available
- ✓ Onsite labs
- ✓ Appointments that start ontime
- ✓ Most insurances in-network. [Check plans](#)

Book an appointment

Doctor Recommended Products



Back Brace for Lower Back Pain - Immediate Relief from Sciatica, Herniated Disc, Scoliosis - Breathable Design

4.6 ★★★★★ (6.4K)

6K+ bought in past month

\$29⁹⁹

✓prime Overnight

FREE delivery **Overnight 8 AM - 9 AM**

🌱 1 sustainability feature ▾

Add to cart

FSA or HSA eligible



Motrin IB Ibuprofen 200mg Tablets, Ibuprofen Pain & Fever Reliever for Headache

4.7 ★★★★★ (2.4K)

1K+ bought in past month

\$16²⁹

✓prime Overnight

FREE delivery **Overnight 7 AM - 11 AM**

Add to cart

FSA or HSA eligible



Icy Hot Original XL Pain Relief Patch (3 Count) for Back and Large Areas

4.5 ★★★★★ (2.4K)

7K+ bought in past month

\$10⁴⁵

✓prime Same Day

FREE delivery **Today 5 PM - 10 PM**

Add to cart

FSA or HSA eligible



Massage Gun, Deep Tissue Back Massage for Athletes for Pain Relief, Percussion Massager with 10 Massages

4.5 ★★★★★ (2.4K)

7K+ bought in past month

\$39⁹⁹

✓prime One Day

FREE delivery **Tomorrow May 15**

🌱 1 sustainability feature ▾

Add to cart

FSA or HSA eligible

Common Prescriptions

Talk to your doctor before starting any prescription medication, **especially if you're pregnant or breastfeeding.**

Prescription Required



Tramadol

Extended Release Tablet · 200mg · 30-day supply

Average insurance price

\$22⁰⁰

To get your exact price, transfer your prescription.

Without insurance

\$29²⁰

Prime member price, 30-day supply.

[amazon pharmacy](#) FREE delivery

Pharmacist Available 24/7 ▾

amazon pharmacy

Recommended prescriptions

Health benefits
connector
options

Prescription Required

MT2

Tramadol

Extended Release Tablet · 200mg · 30-day supply

Average insurance price

\$22⁰⁰

To get your exact price,
transfer your prescription.

Without insurance

\$29²⁰

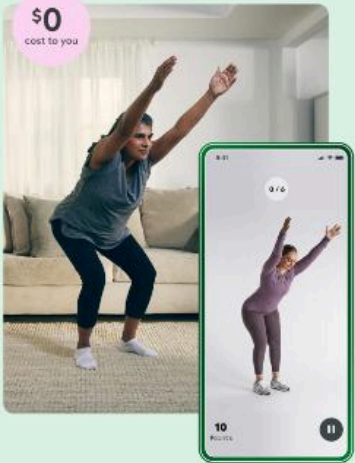
Prime member price, 30-day supply.

amazon pharmacy FREE delivery

Pharmacist Available 24/7

Online Programs

\$0
cost to you



Online physical therapy for back pain

via Hinge Health

\$0⁰⁰

With covered insurance or employer benefits

See options

Relevant Conditions

Pregnancy

Arthritis

Muscle Strain

Scoliosis

Relevant conditions to
explore further



Average confidence rating of understanding AHS offerings after viewing landing page

“ I realized it was a booking screen... I also saw doctor-recommended products, common prescriptions, and online programs.”

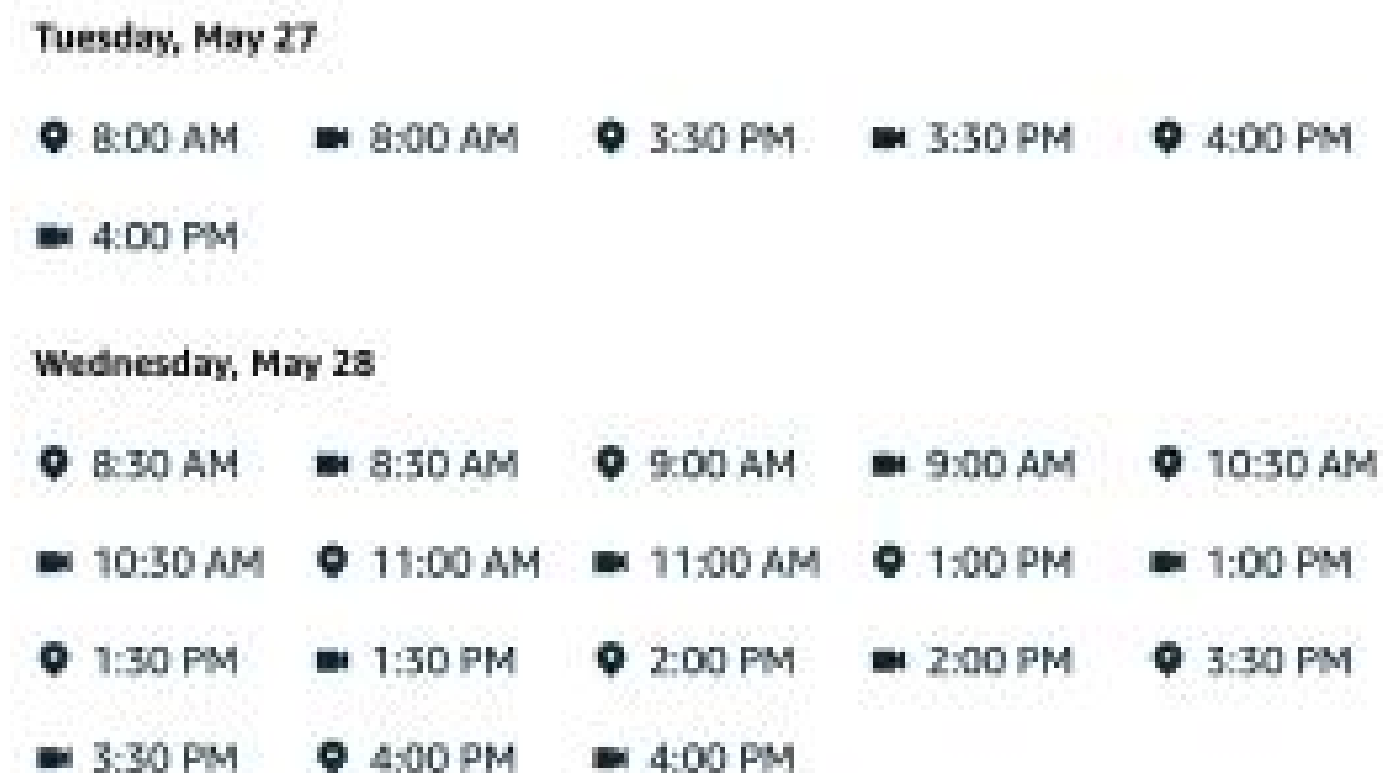
Action

Find | Choose | Afford | Engage

*Maximize parent use of health benefits to purchase
discounted goods and services*

Unintuitive appointment booking structure

Users struggled to distinguish between telehealth and in-person visits



The icon that shows whether it's telehealth or local providers—that's not immediately obvious.

One Medical Appointment Booking

Provides upfront pricing to support affordable care decisions

Separated online and in person appointments

PAY-PER-VISIT | MEMBERSHIP

Get immediate care for your health needs

Day or night, you can book an appointment from One Medical to find treatment for **back pain**.

\$49/video visit | **\$0**/visit with membership

Book your appointment now

Online

In person

Choose a time to book an in-office appointment with one of our One Medical providers near

 Chicago 60201

Select your insurance plan to find providers in network

INSURANCE
Aetna

INSURANCE
Aetna



Nora Smith, MD

4.5 ★★★★★ (21)

Orthopedics ✓ In network

3.2 mi • 4999 Old Orchard Shopping Center, Skokie, IL

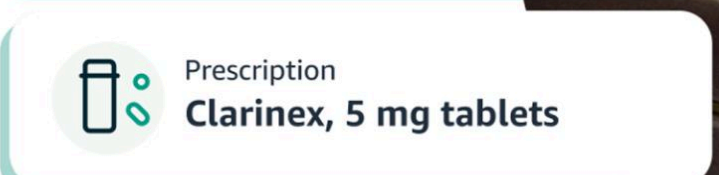
 **Your treatment is ready**

 **Your treatment is ready**



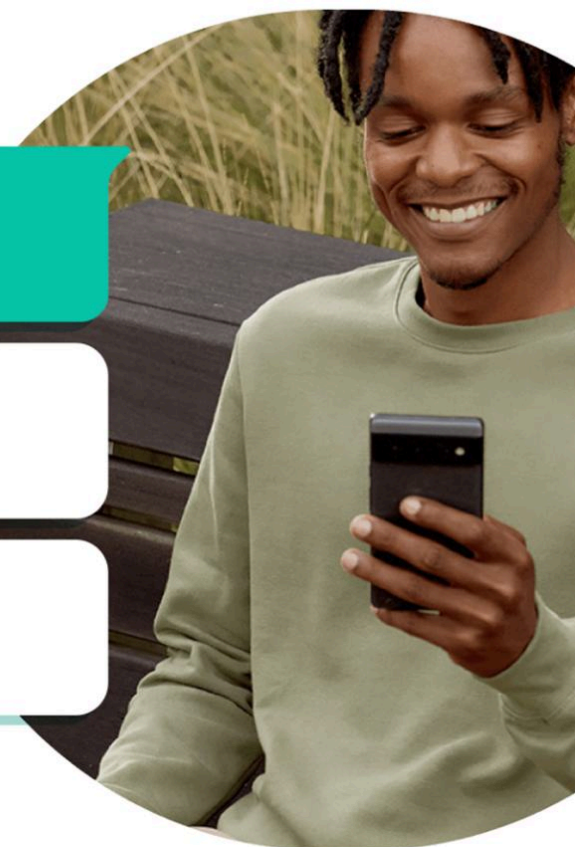
 Your provider
Martha Rivera, MD

 Your provider
Martha Rivera, MD



 Prescription
Clarinox, 5 mg tablets

 Prescription
Clarinox, 5 mg tablets





**Average score users gave for the
ease of exploring services**

“

**Hospital websites feel
outdated and it's hard to
use a lot of the features.
This felt quick and
convenient.**

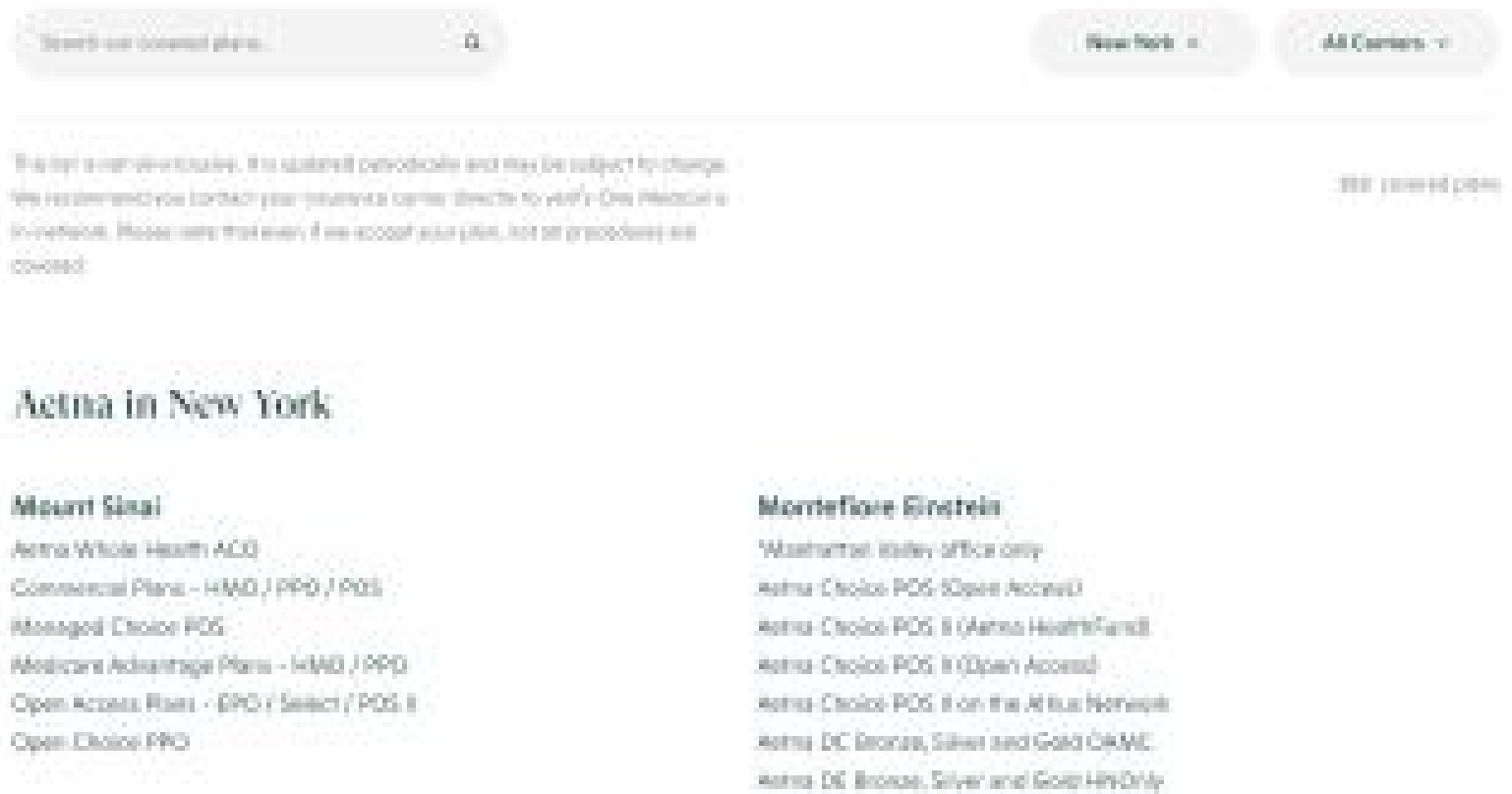
Fragmented insurance experience

Users wanted to see if their insurance was accepted by a provider before booking an appointment

One Medical accepts insurance

In-office and scheduled remote visits are best for ongoing care with a primary care provider, and are billed to you or your insurance (deductibles and copays apply, depending on your insurance plan).

 [See accepted insurance plans](#) 



Avoiding surprise costs is important. I'd want to know what's in-network right away.

One Medical Appointment Booking

Provides upfront pricing to support affordable care decisions

Clarity of cost

Upfront insurance information

PAY-PER-VISIT | MEMBERSHIP

Get immediate care for your health needs

Day or night, you can book an appointment from One Medical to find treatment for **back pain**.

\$49/video visit | **\$0**/visit with membership

Book your appointment now

Online

In person

Choose a time to book an in-office appointment with one of our One Medical providers near

 Chicago 60201

Select your insurance plan to find providers in network

INSURANCE

Aetna



Nora Smith, MD

4.5 ★★★★★ (21)

Orthopedics ✓ In network

Your treatment is ready



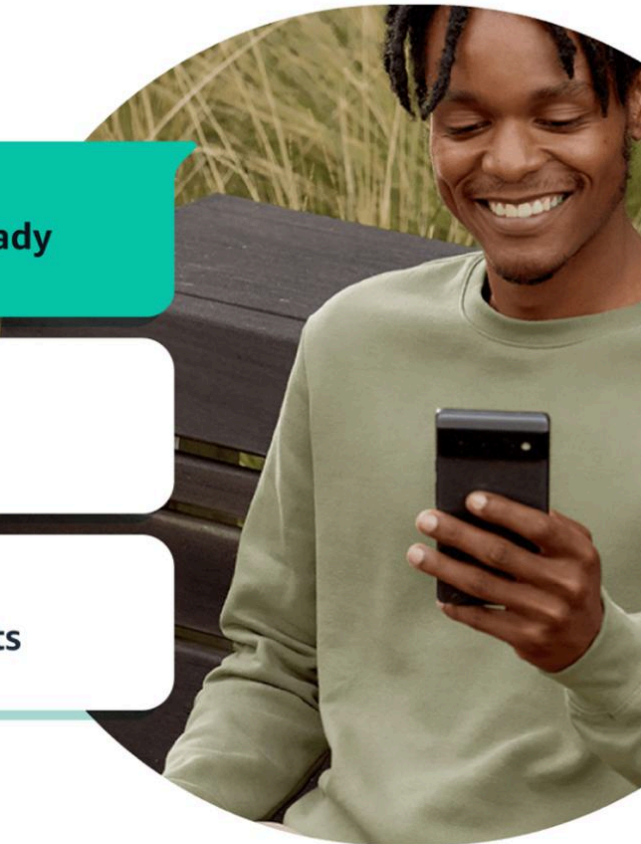
Your provider

Martha Rivera, MD



Prescription

Clarinex, 5 mg tablets



//
**It's nice to see that
I'm already covered
by certain providers
as a filter.**

**Top reason for checking
insurance:**

**"I always check my insurance
before booking"**

Reviews, ratings, and credentials

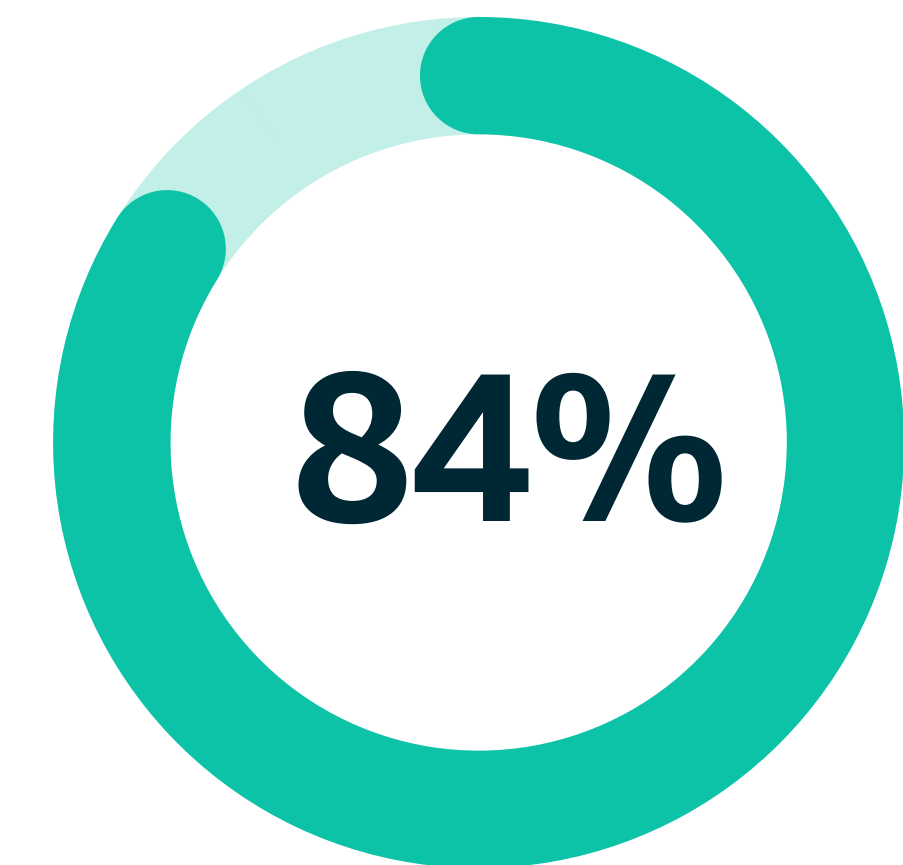
Users valued high doctor reviews and ratings, which should be surfaced clearly



I wouldn't trust my health with just anyone. I need to know more to feel confident... like reviews or specialties.



I don't have enough information about these MDs to tell whether or not they are trustworthy.



of users referenced reviews as part of their decision-making process

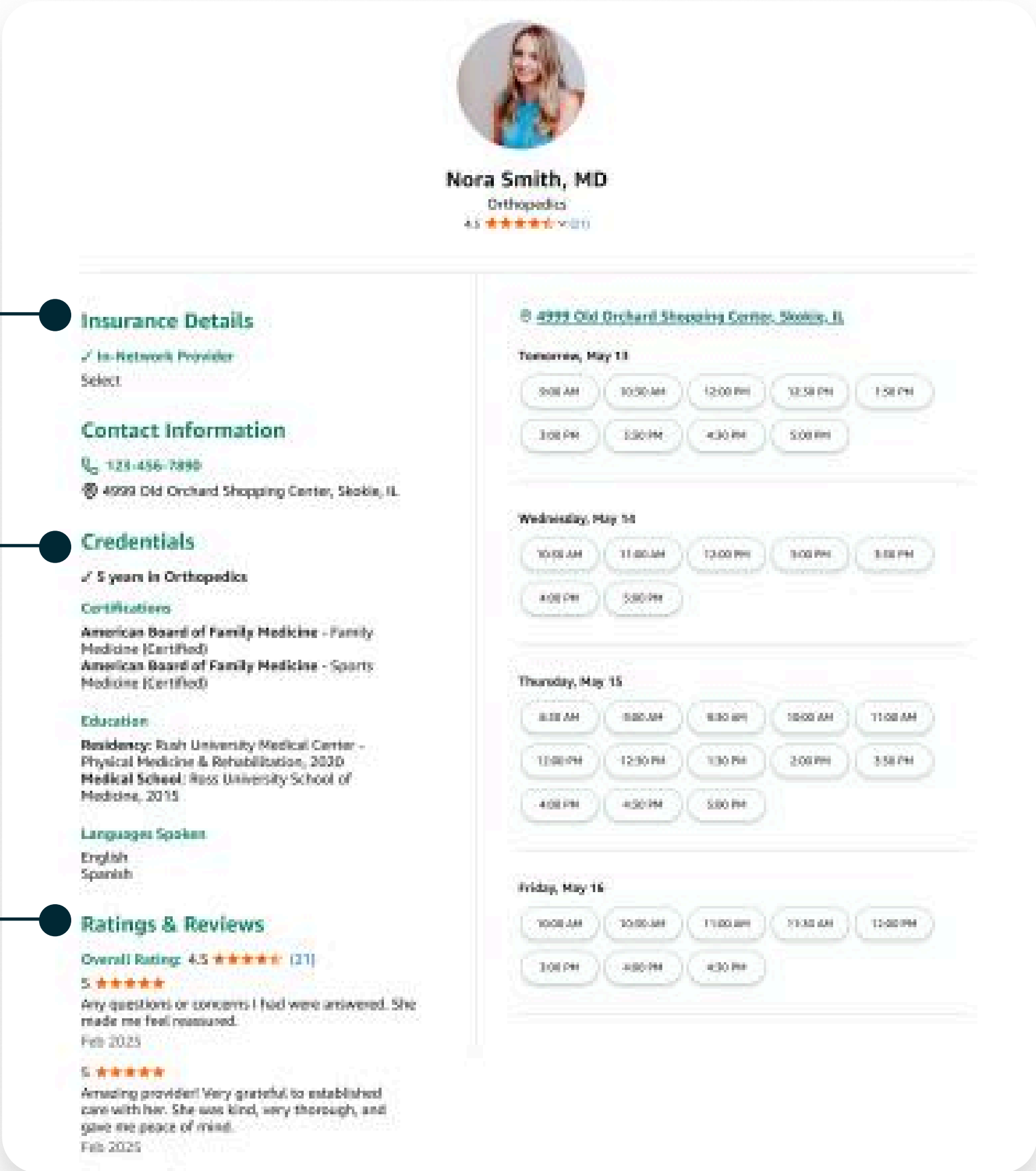
Provider Profile Page

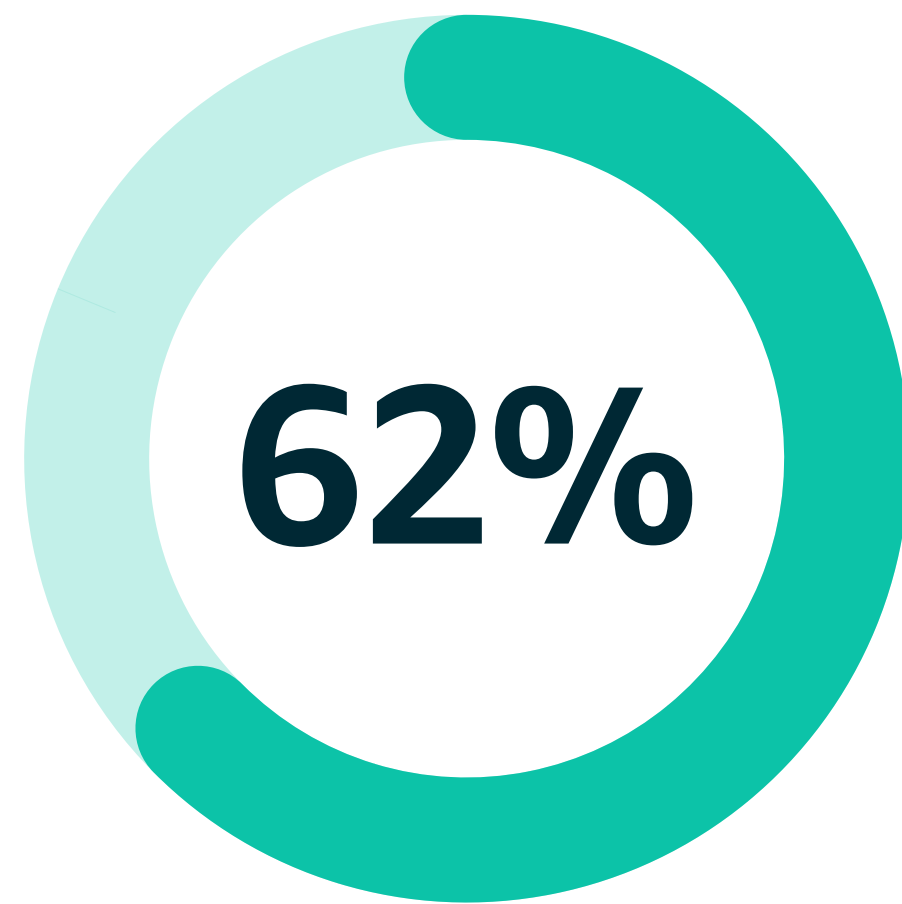
Enables informed, confident choice by surfacing provider details

Insurance plan compatibility

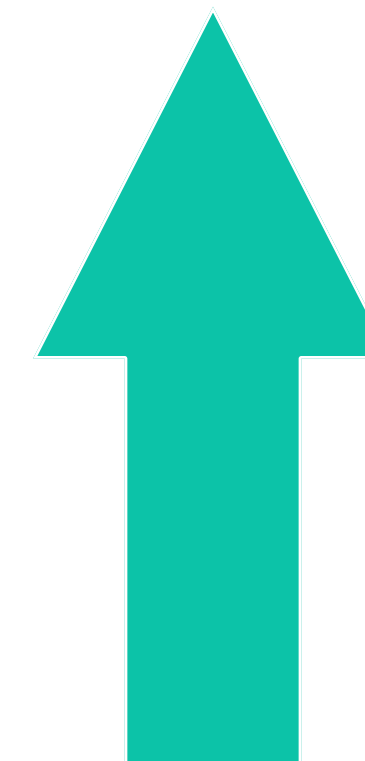
Credentials

Real user reviews and overall ratings





**Average likelihood to
book an appointment**



87.5%

**Increase in average trust rating of
AHS after using prototype**

What do users value and need?

Clarity in offerings

Make **health services easier to understand** with clear, actionable language

Thoughtful timing of CTAs

Introduce care services when users are **most receptive to exploring alternative options**

Transparent provider info

Increase trust through **expanded provider profiles** (including education, reviews, etc...)

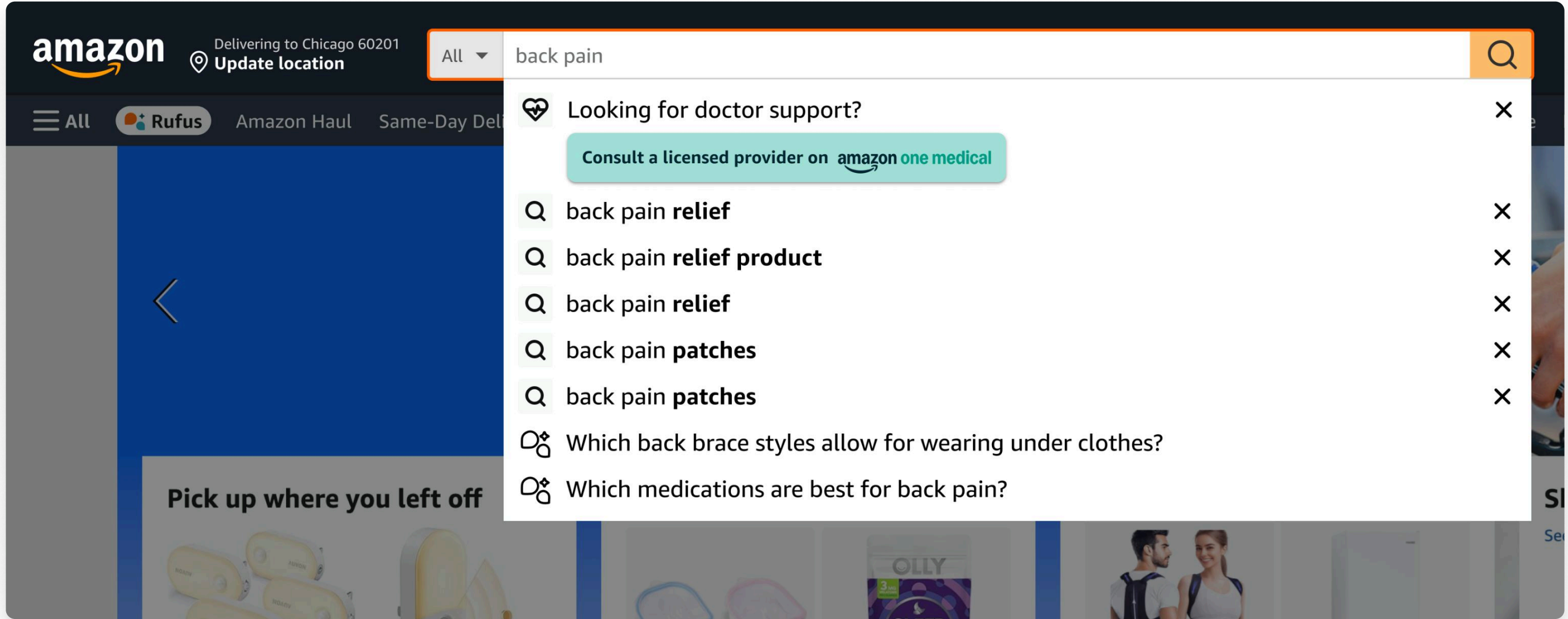
Simplified & visible tools

Make essential features highly visible (consult-a-doctor options, online/in person)

Looking Ahead

Feasibility & Next Steps

Technical feasibility



Rufus

Rufus Beta



What ergonomic designs do back pain relief products feature?



Back pain relief products often incorporate ergonomic designs to help alleviate discomfort and promote better posture. Here are some common ergonomic features:

- Contoured shapes. Many back pain relief products, such as lumbar support cushions and ergonomic chairs, feature contoured shapes that mimic the natural curve of the spine. This design helps maintain proper spinal alignment and reduces strain on the lower back.

Ask Rufus a question

Technical feasibility

SkinCare+

Explore skincare solutions recommended by dermatologists* and across Amazon One Medical healthcare professionals.

Acne
Treatments

Anti-aging
Treatments

Retinoids

Hydrators

Exfoliators

Moisturizers

Sunscreen

Skincare Tools

Retinoids

Hydrators

Exfoliators

Moisturizers

Sunscreen

Skincare Tools

Consult with a licensed provider

Visit for medical advice from \$29

See what our healthcare professionals have to say

Shop by skin type

Shop by skin type

Shop by skin type

Shop by skin type

Shop by skin type

FAQs

Why is SkinCare+?

Can I shop for FSA/HSA eligible products on the SkinCare+ page?

Back Pain Care

Get care from Amazon healthcare professionals—plus products and prescriptions delivered to your door.
powered by **amazon one medical**

Overview

It's important to seek medical advice if your back pain is severe, persistent, or accompanied by other symptoms. Common solutions include improving posture, participating in gentle exercise, using a support pillow or brace, or applying hot and cold therapy.

How does Amazon Health Services generate responses? [Learn more](#)

Book an Appointment



Joint and back support

Back pain, Low back symptoms, Neck pain, Plantar fasciitis (heel pain), Pulled muscles, Sports injuries, Sprains, Tendonitis

Get **virtual** or **in-office** care same or next-day.

- Same or next/day appointments available
- Onsite labs
- Appointments that start ontime
- Most insurances in-network. [Check plans](#)

[Book an appointment](#)

Doctor Recommended Products

Back Brace for Lower Back Pain - Immediate Relief from Sciatica, Herniated Disc, Scoliosis - Breathable Design

4.6 ★★★★★ (6.4K)

6K+ bought in past month

\$29⁹⁹

[prime](#) Overnight

FREE delivery **Overnight 8 AM - 9 AM**

[1 sustainability feature](#)

[Add to cart](#)

Motrin IB Ibuprofen 200mg Tablets, Ibuprofen Pain & Fever Reliever for Headache

4.7 ★★★★★ (2.4K)

1K+ bought in past month

\$16²⁹

[prime](#) Overnight

FREE delivery **Overnight 7 AM - 11 AM**

[Add to cart](#)

FSA or HSA eligible

Icy Hot Original XL Pain Relief Patch (3 Count) for Back and Large Areas

4.5 ★★★★★ (2.4K)

7K+ bought in past month

\$10⁴⁵

[prime](#) Same Day

FREE delivery **Today 5 PM - 10 PM**

[Add to cart](#)

FSA or HSA eligible

Massage Gun, Deep Tissue Back Massage for Athletes for Pain Relief, Percussion Massager with 10 Massages

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7K+ bought in past month

\$39⁹⁹

[prime](#) One Day

FREE delivery **Tomorrow May 15**

[1 sustainability feature](#)

[Add to cart](#)

Technical feasibility: Provider Information



Nora Smith, MD

4.5 ★★★★★ (21)

Orthopedics ✓ In network

3.2 mi • 4999 Old Orchard Shopping Center, Skokie, IL

Insurance coverage

Credentials, ratings,
and reviews

Contact Information

📞 1.214.456-7899

📍 4999 Old Orchard Shopping Center, Skokie, IL

Credentials

✓ 5 years in Orthopedics

Certifications

American Board of Family Medicine - Family Medicine (Certified)

American Board of Family Medicine - Sports Medicine (Certified)

Education

Residency: Rush University Medical Center - Physical Medicine & Rehabilitation, 2020

Medical School: Ross University School of Medicine, 2015

Languages Spoken

English

Spanish

Ratings & Reviews

Overall Rating: 4.5 ★★★★★ (21)

5. ★★★★★

Any questions or concerns I had were answered. She made me feel reassured.

Feb 2025

5. ★★★★★

Amazing provider! Very grateful to established care with her. She was kind, very thorough, and gave me peace of mind.

Feb 2025

Next steps

Complete AHS flow

Continuing the appointment booking flow to examine where efficiency and trust levels can be increased

Data sourcing

Ensure insurance coverage and rating/review data can be showcased, considering in-house or third-party sources

Performance considerations

Implement filtering for provider results so it does not delay loading times

Validate “Relevant Conditions” Button

Test buttons at the bottom of the healthcare landing page for resonance with users



Northwestern University

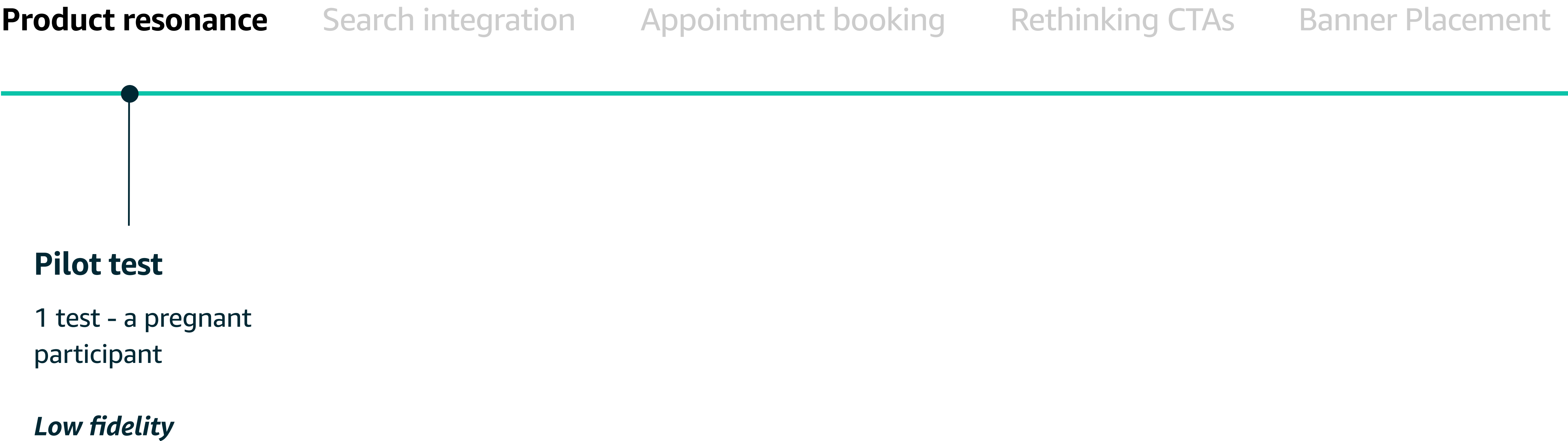
Thank you!
Any questions?

Sabrina Araya, Silvia Fang, Gillian Nieh, Samnang Nuonsinoeun, Janice Seong, June Woo

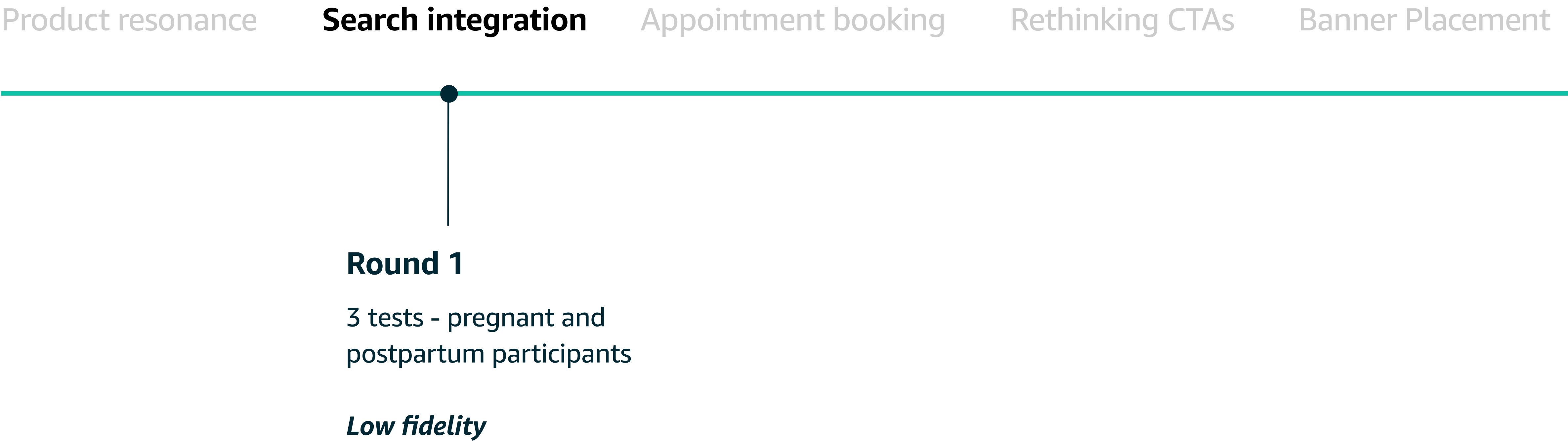
Appendices

Appendix A: Testing Timeline

Testing timeline



Testing timeline



Testing timeline

Product resonance

Search integration

Appointment booking

Rethinking CTAs

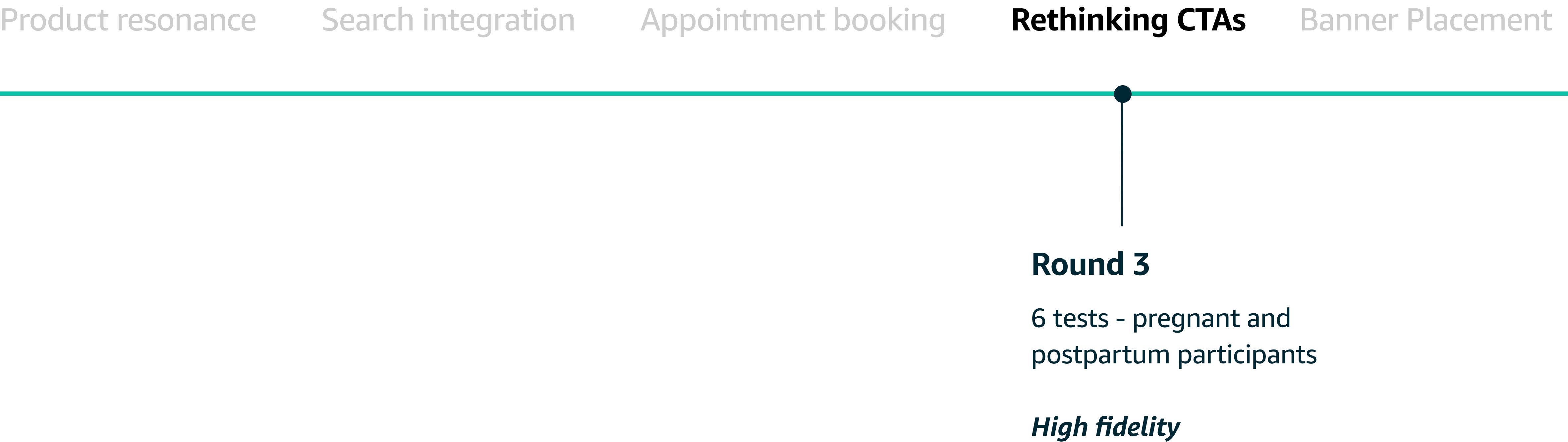
Banner Placement

Round 2

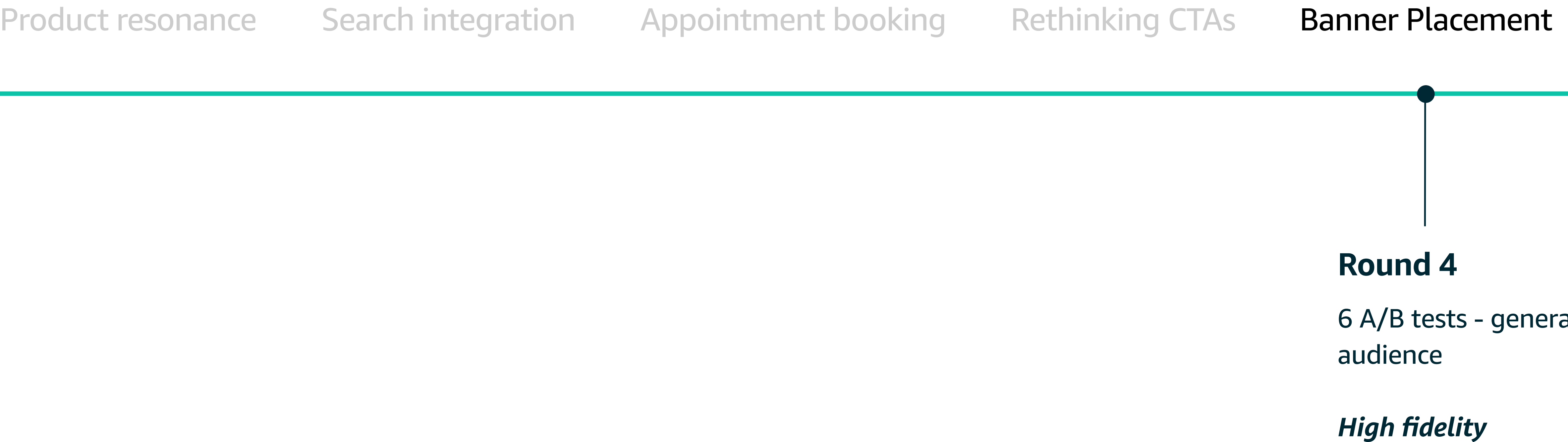
6 tests - pregnant and
postpartum participants

Medium fidelity

Testing timeline



Testing timeline



Appendix B: Product Vision

Vision



Reduce **confusion and stress** when navigating healthcare services during pregnancy and early parenthood



Support prospective, expecting, and current parents with a **seamless, convenient health service experience** across all stages



Boost **trust**, emphasize **ease of use**, and provide **proactive care** through Amazon Health Services



Target Group

Gen Z and Millennial (~25-35 yrs) first-time parents

Digitally native: Amazon Prime and Baby Registry users

Working: balancing pregnancy and parenthood alongside other responsibilities

- First time parents navigating pregnancy for the first time
- New parents adjusting to infant (under 2 yrs) care and postpartum health challenges



Needs

Problem

- First-time parents overwhelmed by the volume of health-related decisions for themselves and their baby
- Many are unaware of available insurance-covered benefits

Product benefits

- Reduced cognitive load for expecting and postpartum parents
- Convenient place to find appointments, products, and other services available via AHS
- Trusted product reviews from Amazon's large user base



Product

Integrated health, mental wellness, and retail hub

- Leverages and combines Amazon's existing ecosystem: One Medical, pharmacy, Health Benefits Connector, shopping

ML-powered service recommendations through marketplace search

- Uses Amazon's unique position as the leading e-commerce platform to make data-driven recommendations that reduce cognitive load for busy parent



Business Goals

How Amazon benefits:

- Increases parent utilization of health benefits for purchasing discounted goods or services
- Captures a larger share of the parenthood market by integrating Amazon Health Services into retail touch points and converting shoppers into healthcare users
- Positions Amazon Health Services as the top choice for healthcare during parenthood, expanding brand presence in the health and wellness space

Appendix C: Audience Artifacts

Claire, the Prospective Parent



- 28 yrs old
- Austin, TX
- Recently married
- Marketing Manager at a tech start up

Claire is actively preparing for pregnancy. She is proactive, digitally savvy, and exploring fertility tracking apps, supplements, and self-education books but she is unsure of what to trust or where to start.

Known Habits

- Uses wearable tech and menstrual / ovulation tracking apps
- Lurks in online communities about fertility and family planning on Reddit
- Shops online (Amazon, Target, Walmart) for books, supplements, and ovulation kits
- Schedules OB/GYN visits via phone or basic insurance portals
- Active; adjusts diet for conception
- Feels hesitant about sharing her journey with family and coworkers

Pain Points

- Overwhelmed by conflicting online information
- Confusion about insurance coverage and when medical care is necessary
- Stress, sensitivity, uncertainty
- Fragmented journey
- Feels isolated as many platforms are too clinical or too casual; worries about it being a taboo topic

Needs

- Trusted fertility and preconception advice
- Affordable and easy access to fertility support
- Emotional and social support without stigma
- Seamless continuity of care
- Affordable, effective products (vitamins, ovulation tests) backed by medical advice

Claire's Current State Journey Map

Stages	Awareness & Intention	Exploration*		Care Navigation*		Transition to Pregnancy
		Preparation & Research	Product Discovery	Provider & Care Search	Emotional Support	
Experience	Motivated and hopeful	Motivated but overwhelmed	Negative, too many options without enough clarity	Negative, caused by fragmented system and confusing insurance options	Negative, feeling isolated and emotionally unsupported	Positive, excited but could feel like starting from square one again
	POSITIVE					
	NEUTRAL					
	NEGATIVE					
User Activity What action does the user take during each step?	- Googles "how to get pregnant" - Follows fertility influencers - Browses Reddit, blogs, TikToks	- Tracks cycle with apps (Flo, Apple Health) - Changes diet and start exercising for fertility - Reads articles and books - Order vitamins	- Searches for ovulation kits, teas, fertility tools - Look at fertility books on Amazon - Shops Amazon, Target, Walmart for products for conceiving; reads reviews	- Searches for OB-GYNs via Google, Zocdoc, or insurance site - Calls offices and clinics - Try to book fertility consult or physical	- Lurks in Reddit / Facebook groups - Occasionally confide in friends - Experience emotional highs and lows - Seeks validation through journaling or self-soothing	- Takes positive test at home - Downloads pregnancy app - Tries to contact OB/midwife - Starts reading new content
Goals What is the user trying to accomplish?	- Understand how to begin trying to conceive - Where to begin, how to prepare, what to avoid - Feel empowered and informed	- Build healthy habits - Learn what impacts fertility - Track fertility - Feel proactive	- Identify trustworthy products that support health goals - Effective and affordable - Not feel duped by influencers	- Validate health status and professional support - Start preconception or early pregnancy care	- Feel less alone - Feel emotionally understood and supported - Connect with others in a stigma-free way	- Transition into pregnancy with ease - Keep momentum, especially maintaining continuity of support
Pain points What's not working well? What causes friction? How many people does this affect? On a scale of 'nuisance to show-stopper', how bad is this pain?	- Conflicting advice online - Don't know who to trust - Unclear when to see a doctor or get tests - Moderate pain as it affects most new individuals trying to conceive	- Multiple apps without a unified system making the process feel fragmented → no one stop hub - Mild pain: nuisance but common	- Overwhelming choices with unclear safety / effectiveness ratings - No clarity on what's medically sound - High pain: paralyzes decision-making, causes mistrust and indecision - High friction	- Difficulty finding in-network care - Long waits for appointments - Poor insurance clarity on fertility related services - High pain: major barrier to care; drop off point	- Online communities feel unsafe or too casual - Could just be a negative cycle - Stigma remains in non-online relationships and prevents open conversation - High pain; impacts emotional wellbeing	- No data or tool continuity - Must "start over" in new app/platform - Mild pain
Opportunities How might we address these pain points? How big is the opportunity if we correct this pain point? What are new ways to serve this person?	- Have a trying to conceive starter hub - Expert backed guidance, tools, and community - Symptoms checklist - High impact opportunity as it could shape early trust in AHS	- Provide an integrated dashboard that syncs health tracking, content, and product suggestions - Medium to high impact opportunity for convenience-driven users like busy young adults	- Medically curated kits - Clear shopping filters - Simplify retail experience and increases conversions	- Direct provider search and booking - Insurance check through AHS - Huge opportunity to streamline entry into care by simplifying medical onboarding	- In-app support group and mood tracking - Offer access to licensed therapists - Closes critical support gap and enhances retention by addressing hidden emotional needs	- Seamlessly migrate user data into pregnancy tracking tools OR have them as part of AHS as well - Provide one-stop care - Pre-fill registry suggestions based on previous purchases - Boost retention and satisfaction across life stages

Claire's Future State Journey Map

Stages	Awareness & Intention	Exploration*		Care Navigation*		Transition to Pregnancy
		Preparation & Research	Product Discovery	Provider & Care Search	Emotional Support	
Experience	Empowered and guided	Confident and informed	Curated and simplified	Seamless and integrated	Emotionally supported	Continuous and effortless
	POSITIVE 					
	NEUTRAL					
	NEGATIVE					
User Activity <i>What action does the user take during each step?</i>	- Lands on Amazon's TTC Hub - Completes guided readiness quiz	- Tracks cycle with synced app - Follows a guided checklist - Receives daily tips and reminders	- Shops curated conception bundles - Uses "doctor approved" filters - Receives product nudges based on health data	- Books preconception visit via AHS - Insurance is checked in-app - Receives provider messages with prep steps	- Joins in-app peer group - Tracks mood - Schedules check-ins with virtual coach or therapist	- Takes positive test at home - Profile transitions to pregnancy dashboard - Registry and care suggestions auto-populate
Goals <i>What is the user trying to accomplish?</i>	- Understand how to begin trying to conceive - Where to begin, how to prepare, what to avoid - Feel empowered and informed	- Build healthy habits - Learn what impacts fertility - Track fertility - Feel proactive	- Identify trustworthy products that support health goals - Effective and affordable - Not feel duped by influencers	- Validate health status and professional support - Start preconception or early pregnancy care	- Feel less alone - Feel emotionally understood and supported - Connect with others in a stigma-free way	- Transition into pregnancy with ease - Keep momentum, especially maintaining continuity of support
Pain points addressed <i>What pain points have been addressed by our solution?</i>	- Eliminates guesswork - Replaces conflicting content	- Ends app-hopping and tool overload - Syncs prep tasks with health plan	- Reduces product overwhelm - Builds trust with clinical validation	- Clarifies care access and coverage - Reduces time and effort to begin	- Fills emotional support gap - Reduces stigma and mental load	- Prevents starting from scratch - Links the phases seamlessly
Opportunities (realised) <i>How might we address these pain points?</i> <i>How big is the opportunity if we correct this pain point?</i> <i>What are new ways to serve this person?</i>	- Have a trying to conceive starter hub - Expert backed guidance, tools, and community - Symptoms checklist - High impact opportunity as it could shape early trust in AHS 	- Provide an integrated dashboard that syncs health tracking, content, and product suggestions - Medium to high impact opportunity for convenience-driven users like busy young adults 	- Medically curated kits - Clear shopping filters - Simplify retail experience and increases conversions 	- Direct provider search and booking - Insurance check through AHS - Huge opportunity to streamline entry into care by simplifying medical onboarding 	- In-app support group and mood tracking - Offer access to licensed therapists - Closes critical support gap and enhances retention by addressing hidden emotional needs 	- Seamlessly migrate user data into pregnancy tracking tools OR have them as part of AHS as well - Provide one-stop care - Pre-fill registry suggestions based on previous purchases - Boost retention and satisfaction across life stages 

Julie, the Expecting Parent



Demographics

- 34 yrs old
- Chicago, IL
- Married, one son (3yrs), one dog
- Program Manager at Pinterest

Julie is expecting her second child in August (2nd trimester). She feels prepared and knowledgeable with reliable doctors, routines, and products.

Known Habits

- Prefers in-person doctor's appointments
- Occasionally messages care team through online platform
- Researches thoroughly (word of mouth, online) when making purchases for herself/her baby
- Relies on online ordering and curbside pickup to save time
- Has never tried telehealth platforms such as Zocdoc, Teladoc, CVS

Pain Points

- Low emotional and physical bandwidth as due date approaches
- Struggles to balance work, her child, and pregnancy (appointments, preparation)
- Finds combination of messaging and in person care too slow for immediate needs

Needs

- Fast, reliable answers to questions
- Time-saving solutions to balance all aspects of her life (work, family, pregnancy)
- Easy access to suggested products

Julie's Current State Journey Map

Stages	Awareness & Intention	Exploration*		Care Navigation*		Transition to Birth
		Preparation & Research	Product Discovery	Provider & Care Search	Emotional Support	
Experience	Experienced but time-limited	Knows what to do but little time	Efficient but repetitive	Cumbersome, scheduling is slow	Under-supported due to no structure	Organised but drained
	POSITIVE					
	NEUTRAL					
	NEGATIVE					
User Activity <i>What action does the user take during each step?</i>	- Revisits previous pregnancy notes and resources - Mentally prepares for what's ahead by refreshing timelines and tasks - Relies on memory from her first pregnancy	- Reorders vitamins and wellness items - Searches for specific needs (e.g. supplements, fatigue solutions) - Checks multiple sources briefly but lacks time for deep research	- Uses Amazon and Target to shop essentials - Buys the same items she used with her first child - Relies on curb-side pickup and subscribe & save	- Books checkups via phone or online portal - Waits for replies to portal messages - Doesn't use telehealth	- Experiences emotional sensitivity, fatigue, stress - Confides only in close family and friends - Doesn't participate in structured support groups	- Finalises hospital bag - Prepares registry - Manages birth plan check-ins and child care coordination - Starts scheduling paediatrician onboarding
Goals <i>What is the user trying to accomplish?</i>	- Quickly recall what matters most in the second trimester - Avoid over-researching and over-committing - Feel reassured that she's on track	- Stay healthy and comfortable with minimal effort - Manage symptoms proactively - Make informed decisions without overthinking	- Replenish supplies quickly - Save time and mental energy - Avoid spending on non-essentials	- Keep prenatal care consistent - Get answers to questions quickly - Avoid disruptions in provider access	- Feel emotionally balanced and less isolated - Be seen as more than just a checklist - Avoid burnout, especially as she juggles parenting + work	- Feel logistically prepared - Avoid last-minute panic - Ensure child and home are cared for during birth
Pain points <i>What's not working well?</i> <i>What causes friction?</i> <i>How many people does this affect?</i> <i>On a scale of 'nuisance to show-stopper', how bad is this pain?</i>	- May assume she remembers everything, but best practices change - Lacks a refresh of new or updated guidance for second-time parents - Affects many multi-child parents, especially working professionals - Mild pain level, just a nuisance	- Too busy to verify advice or cross-check sources - Feels like starting from scratch even though this isn't her first pregnancy - Most pregnant individuals face time limits during this phase - Moderate pain level	- No updates on new or improved products - No product curation for experienced parents - Results in over-purchasing or missing out on helpful updates - Moderate pain level	- In-network access / in-person + messaging model is slow  - No synchronous care option - Affects many working parents; delays can lead to skipped care - High pain level, especially damaging with fatigue → drop off point	- No lightweight, emotionally supportive resources - Online spaces feel too intense or too shallow - High impact on emotional wellbeing for second-time parents	- No support tailored to second-time delivery - Needs vary from first pregnancy but systems treat them the same - Feels like she's repeating the same process, but with more pressure
Opportunities <i>How might we address these pain points?</i> <i>How big is the opportunity if we correct this pain point?</i> <i>What are new ways to serve this person?</i>	- Provide an "experienced parent refresher" experience within AHS - Personalised checklists - Week-by-week overview - Medium impact: saves time and builds trust	- Sync Amazon product usage history with AHS and serve personalised recommendations - Offer medical guidance based on trimester and previous pregnancies - High impact as this improves convenience and trust	- Created curated "experienced parent essentials" bundles - High impact: supports smarter purchasing and improves retention - Use ML to remove redundant recommendations - Highlight new products	- Offer same-day telehealth slots for common pregnancy questions - High impact as it can dramatically reduce delays and prevent drop-off - Automated AHS chat support in response to tracked symptoms	- Offer quick (e.g. 2-min) guided reflections or check-ins in app - Suggest "support for working mums" track or micro-supported modules - Builds trust and retention → medium impact	- Provide personalised checklist updates for second pregnancy - Suggest registry gaps or services related to child- / home-care coordination support - Reinforces continuity and builds brand loyalty

Julie's Future State Journey Map

Stages	Awareness & Intention	Exploration*		Care Navigation*		Transition to Birth
		Preparation & Research	Product Discovery	Provider & Care Search	Emotional Support	
Experience	Empowered and feels seen	Confident; process is time-efficient	Efficient but repetitive	Cumbersome, scheduling is slow	Under-supported due to no structure	Organised but drained
	POSITIVE					
	NEUTRAL					
	NEGATIVE					
User Activity <i>What action does the user take during each step?</i>	- Logs into AHS dashboard - Sees "second pregnancy timeline" - Reviews personalised checklist	- Use AHS app to track symptoms and receive tailored articles - Gets automatic tips based on trimester + pregnancy history - Receives reminders for supplements and key milestones	- Shops curated "Second-Time Essentials" bundle on Amazon - Uses filter that shows what's new since last pregnancy - Reorders trusted favourites via Subscribe & Save	- Books follow-ups through AHS-integrated provider network - Receives automatic appointment reminders - Has option for live chat / telehealth consults for quick concerns	- Opts into "support for working mums" inside app - Receives 2-minute reflection prompts during downtime - Has access to therapist-led video check-ins if needed	- App auto-generates pre-birth checklist based on household (e.g., childcare, pet care, home care) - Registry gaps flagged and fixed - Paediatrician appointment and post-birth resources recommended
Goals <i>What is the user trying to accomplish?</i>	- Quickly recall what matters most in the second trimester - Avoid over-researching and over-committing - Feel reassured that she's on track	- Stay healthy and comfortable with minimal effort - Manage symptoms proactively - Make informed decisions without overthinking	- Replenish supplies quickly - Save time and mental energy - Avoid spending on non-essentials	- Keep prenatal care consistent - Get answers to questions quickly - Avoid disruptions in provider access	- Feel emotionally balanced and less isolated - Be seen as more than just a checklist - Avoid burnout, especially as she juggles parenting + work	- Feel logistically prepared - Avoid last-minute panic - Ensure child and home are cared for during birth
Pain points addressed <i>What pain points have been addressed by our solution?</i>	- Removes guesswork - Personalises experience from day one - No need to start from scratch	- Eliminates app-hopping - Syncs health info with helpful, relevant content	- No more repetitive shopping - Simplifies decision-making - Promotes discovery with minimal effort	- Ends portal messaging and clinic delays - Adds same-day support for common needs	- Offers structure without requiring lots of time - Normalises support for working moms in pregnancy	- No need to remember everything - Fewer tasks slip through the cracks
Opportunities (realised) <i>How might we address these pain points?</i> <i>How big is the opportunity if we correct this pain point?</i> <i>What are new ways to serve this person?</i>	- Provide an "experienced parent refresher" experience within AHS - Personalised checklists - Week-by-week overview - Medium impact: saves time and builds trust	- Sync Amazon product usage history with AHS and serve personalised recommendations - Offer medical guidance based on trimester and previous pregnancies - High impact as this improves convenience and trust	- Created curated "experienced parent essentials" bundles - High impact: supports smarter purchasing and improves retention - Use ML to remove redundant recommendations and highlight new products	- Offer same-day telehealth slots for common pregnancy questions - High impact as it can dramatically reduce delays and prevent drop-off - Automated AHS chat support in response to tracked symptoms	- Offer quick (e.g. 2-min) guided reflections or check-ins in app - Suggest "support for working mums" track or micro-supported modules - Builds trust and retention → medium impact	- Provide personalised checklist updates for second pregnancy - Suggest registry gaps or services related to child- / home-care coordination support - Reinforces continuity and builds brand loyalty

Sarah, the New Parent



Demographics

- 26 yrs old
- San Francisco, CA
- Married, has a newborn
- UX Designer at Adobe

Sarah just had her first child and is postpartum 4 weeks with a newborn at home. She feels overwhelmed and uncertain about what's normal as she navigates caring for a newborn—all while looking for more support, clarity, and reassurance.

Known Habits

- Values routine in-person doctor's appointments and medication pick-up
- Open to trying new health services but reverts back to what is familiar
- Unsure of where to find resources she needs
- Relies on family and friends for support
- Uses online shopping for baby registry and maternity/baby products

Pain Points

- Feeling overwhelmed by the transition to life with a newborn
- Emotional adjustment and unfamiliar feelings after giving birth
- Juggling baby's needs with personal recovery and household responsibilities

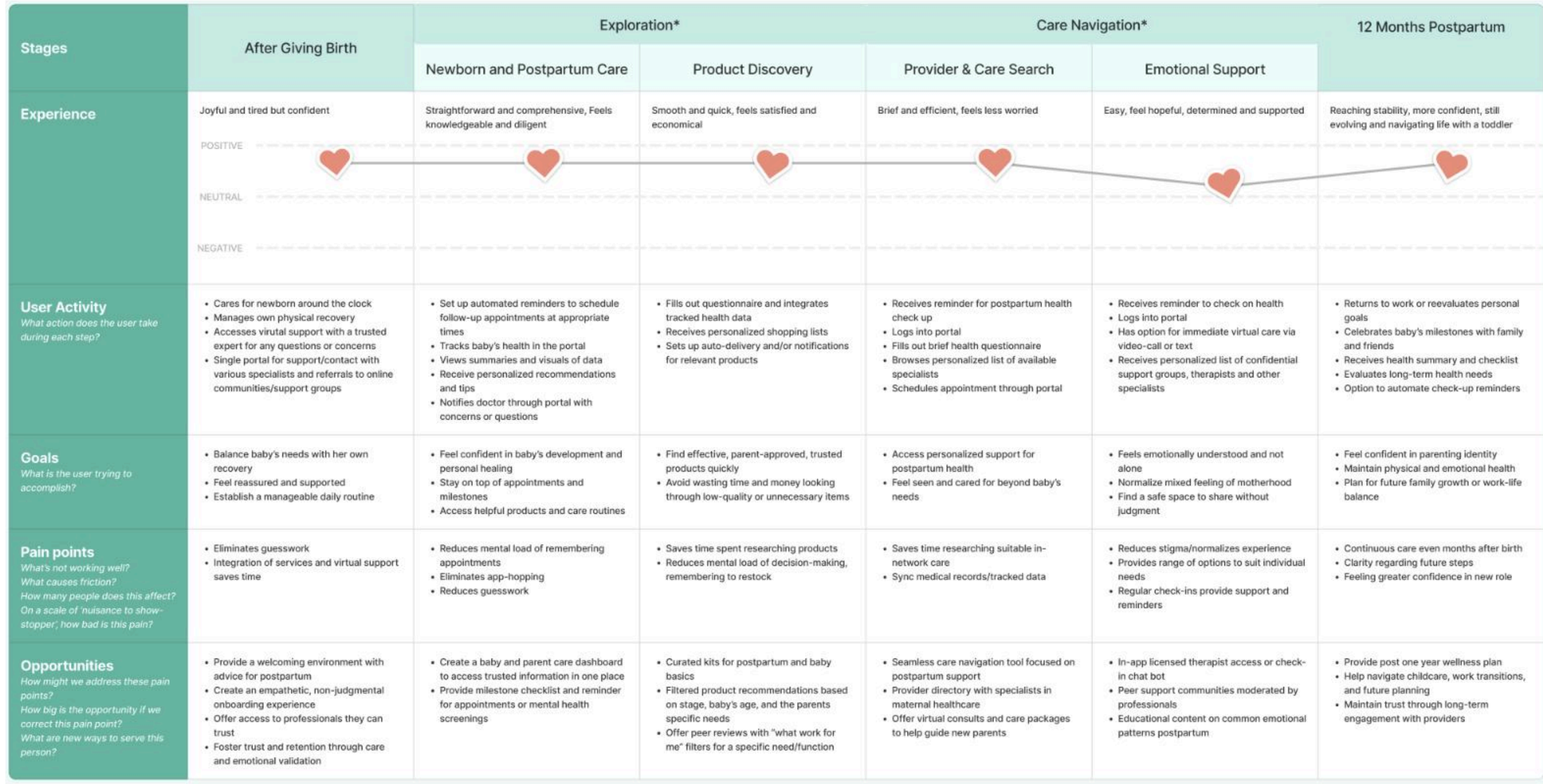
Needs

- Easy access to affordable and trusted products and advice for postpartum care and newborn support
- Consistent, personalized care to build trust in healthcare professionals and relieve the stress of new parenthood

Sarah's Current State Journey Map

Stages	After Giving Birth	Exploration*		Care Navigation*		12 Months Postpartum
		Newborn and Postpartum Care	Product Discovery	Provider & Care Search	Emotional Support	
Experience	Joyful but also anxious and emotionally fragile POSITIVE NEUTRAL NEGATIVE	Managing, but feel under-supported and unsure	Negative, overwhelmed by options and unclear on what is necessary	Negative, feels fragmented and impersonal	Negative, feels isolated and emotionally unsupported	Reaching stability, more confident, still evolving and navigating life with a toddler
User Activity <i>What action does the user take during each step?</i>	- Cares for newborn around the clock - Manages own physical recovery - Googles what's "normal" for herself and baby - Asks friends/family for advice - Visits pediatrician and OB-GYN - Joins online new parent support groups	- Schedules and attends pediatric/OB follow-up appointments - Tracks feeding, sleep, and changes in app/notes - Orders baby and recovery products online - Reads parenting posts/blogs online	- Browses online shopping sites while busy taking care of newborn - Searches for products with the best reviews or recommendations from family/friends - Reads endless reviews and ends up ordering stuff last minute when its needed	- Tries to find lactation, pelvic floor, and mental health specialists through healthcare provider - Calls clinics, insurance company, and searched online for what options are available - Looks for virtual options to fit their busy schedule	- Scrolls through online forums and groups for validation - Journals or vents to close friends/family - Struggles to admit that they are having a hard time or stressed - May avoid traditional therapy due to stigma, time commitment or effort	- Returns to work or reevaluates personal goals - Reflects on growth and challenges from the first year - Celebrates baby's milestones with family and friends - Evaluates long-term health needs
Goals <i>What is the user trying to accomplish?</i>	- Balance baby's needs with her own recovery - Feel reassured and supported - Establish a manageable daily routine	- Feel confident in baby's development and personal healing - Stay on top of appointments and milestones - Access helpful products and care routines	- Find effective, parent-approved, trusted products quickly - Avoid wasting time and money looking through low-quality or unnecessary items	- Access personalized support for postpartum health - Feel seen and cared for beyond baby's needs	- Feels emotionally understood and not alone - Normalize mixed feeling of motherhood - Find a safe space to share without judgment	- Feel confident in parenting identity - Maintain physical and emotional health - Plan for future family growth or work-life balance
Pain points <i>What's not working well?</i> <i>What causes friction?</i> <i>How many people does this affect?</i> <i>On a scale of 'nuisance to show-stopper', how bad is this pain?</i>	- Emotional vulnerability and lack of clarity on what's normal - Information overload leads to difficulty distinguishing between helpful and harmful information - No centralized support system	- Confusing or scattered care instructions/ advice - Lack of support on postpartum and mental health - No clear roadmap for recovery or newborn care	- Too many choices with no clear best option - Hard to tell what is needed vs "nice to have" - Feels like guessing in the dark and having to rush and buy things last minute	- Poor visibility into in-network postpartum care - Lack on continuity from delivery to postpartum - Long wait times and lack of responsiveness	- Few spaces to process emotions freely/ safely - Stigma around postpartum mental health - No proactive emotional check-ins from providers	- Still managing residual exhaustion or self-neglect - Healthcare system stops checking in after initial months - Uncertainty around what's next
Opportunities <i>How might we address these pain points?</i> <i>How big is the opportunity if we correct this pain point?</i> <i>What are new ways to serve this person?</i>	- Provide a welcoming environment with advice for postpartum - Create an empathetic, non-judgmental onboarding experience - Offer access to professionals they can trust - Foster trust and retention through care and emotional validation	- Create a baby and parent care dashboard to access trusted information in one place - Provide milestone checklist and reminder for appointments or mental health screenings	- Curated kits for postpartum and baby basics - Filtered product recommendations based on stage, baby's age, and the parents specific needs - Offer peer reviews with "what work for me" filters for a specific need/function	- Seamless care navigation tool focused on postpartum support - Provider directory with specialists in maternal healthcare - Offer virtual consults and care packages to help guide new parents	- In-app licensed therapist access or check-in chat bot - Peer support communities moderated by professionals - Educational content on common emotional patterns postpartum	- Provide post one year wellness plan - Help navigate childcare, work transitions, and future planning - Maintain trust through long-term engagement with providers

Sarah's Future State Journey Map



Appendix D: OKRs

Objectives & Key Results

Objectives	Maximize parent* use of health benefits to purchase discounted goods and services	Seamlessly integrate retail shopping and Amazon Health Services use for parents	Position Amazon Health Services as the top choice throughout parenthood
Outcomes	Increase average parent savings across Amazon Health Services by 15% Increase use of Prime-discounted One Medical memberships among parents by 5%	Implement intuitive search experience within Amazon retail to showcase health services by Q3 Increase CTR from Amazon retail to AHS by 7% Onboard 15% of parents on Amazon Retail to Amazon Health Services by Q4	Achieve 10% increase in first-time Amazon Pharmacy parent users by EOY Increase One Medical enrollment for parents within the window of 1 year before and after birth by 20% YoY Retain 70% of parents YoY on One Medical after first year membership

* parents are defined as Amazon users with purchasing history of prenatal, pregnancy, and baby products

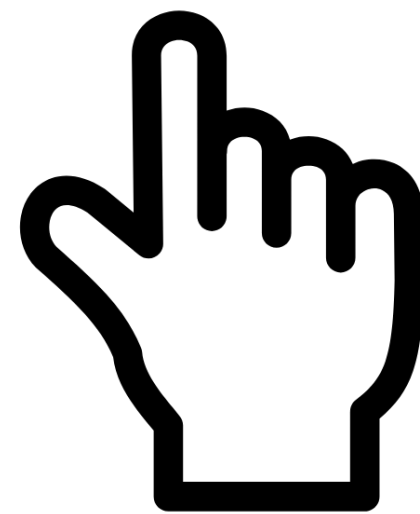
Appendix E: Current State Analysis

Amazon Health Services' KPIs



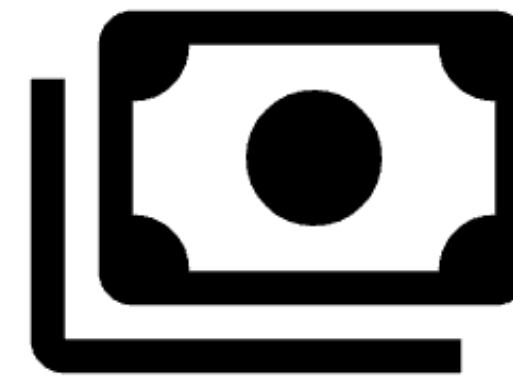
Find

Increase **awareness** of AHS services



Choose

Increase **clarity** of offers and options



Afford

Increase **use** of health benefits to purchase goods & services



Engage

One-stop buying options for all needs

Knowledge Goals

Find

How do users *discover* AHS and retail services?

- How do AHS services connect with retail?
- Are there gaps between these services?
- How well are the AHS services integrated with other core Amazon offerings?

Choose

How consistently do users *return to and use* Amazon services?

- What services are used at each parenting stage and why?
- How clear are the health service options?

Knowledge Goals

Afford

How do users *leverage benefits* to access health services?

- What benefits are available to Amazon users through AHS?
- What discounts are available?

Engage

How consistently do users *return to and use* Amazon services?

- What services see repeat or consistent use over time?
- How integrated are AHS and retail experiences to facilitate continued use?
- Are there drop-off points between parenting stages and usage?



How well are parents
**discovering, understanding,
affording, and continuing to
use Amazon Health Services
alongside retail experiences?**

Current Experience

Ecosystem

Amazon currently has a fragmented experience for families on the parenthood journey across retail and AHS.

Amazon Retail

- No Maternity section under women's clothing
- Baby Registry is under Toys, Kids & Baby, Programs & Features

Amazon Health Services

- AHS offers standard care, but it's unclear if it covers the needs of pregnant individuals
- Types of doctors (e.g., OB-GYN, Fertility Specialist) are not clearly outlined

Current Experience

Users

How do prospective, new, and experienced parents ***discover*** these services?

Amazon Retail

- Targeted ads
- Word-of-mouth
- Personalized suggestions seen while browsing on the main shopping section

Amazon Health Services

- Accessed via Amazon's website, with a focus on convenience and integration into their existing shopping habits.

Current Experience

Users

What services are used at *each parenting stage*?

Prospective Parents

- Retail: fertility products, prenatal vitamins, books, pregnancy planning items
- AHS: informational purposes, early prenatal care, fertility specialists

New Parents

- Retail: baby essentials, maternity wear, cribs, diapers
- AHS: postpartum care, mental health support, pediatrics

Experienced Parents

- Retail: children's clothing, toys, health products, educational materials
- AHS: routine health checks, specialized consultations

Current Experience

Users

What services see *consistent use(or not)*?

Consistent Use

- Retail: baby products, clothing, health supplies
- AHS: general healthcare, mental health support

Inconsistent Use

- AHS: specialized health services for pregnancy

Appendix E: KPIs + Impact

Freely Available Data

Leading

Leading

Lagging

Lagging

Leading

Ideal Client Side Analysis

Leading

Leading

Leading

Lagging

Lagging

Lagging

Lagging

Lagging

KPI Breakdown

→ *How well are parents discovering, understanding, affording, and continuing to use AHS alongside retail experiences?*

Find - *movement between services*

- % of baby registry users that also visit AHS - leading
- Click-through rate from retail/registry pages to AHS - leading

Choose - *AHS usage*

- % of parents accessing health services before birth - leading
- % of parents accessing health services within 6 months after birth - lagging

KPI Breakdown

→ *How well are parents discovering, understanding, affording, and continuing to use AHS alongside retail experiences?*

Afford - *retail & pharmacy purchases*

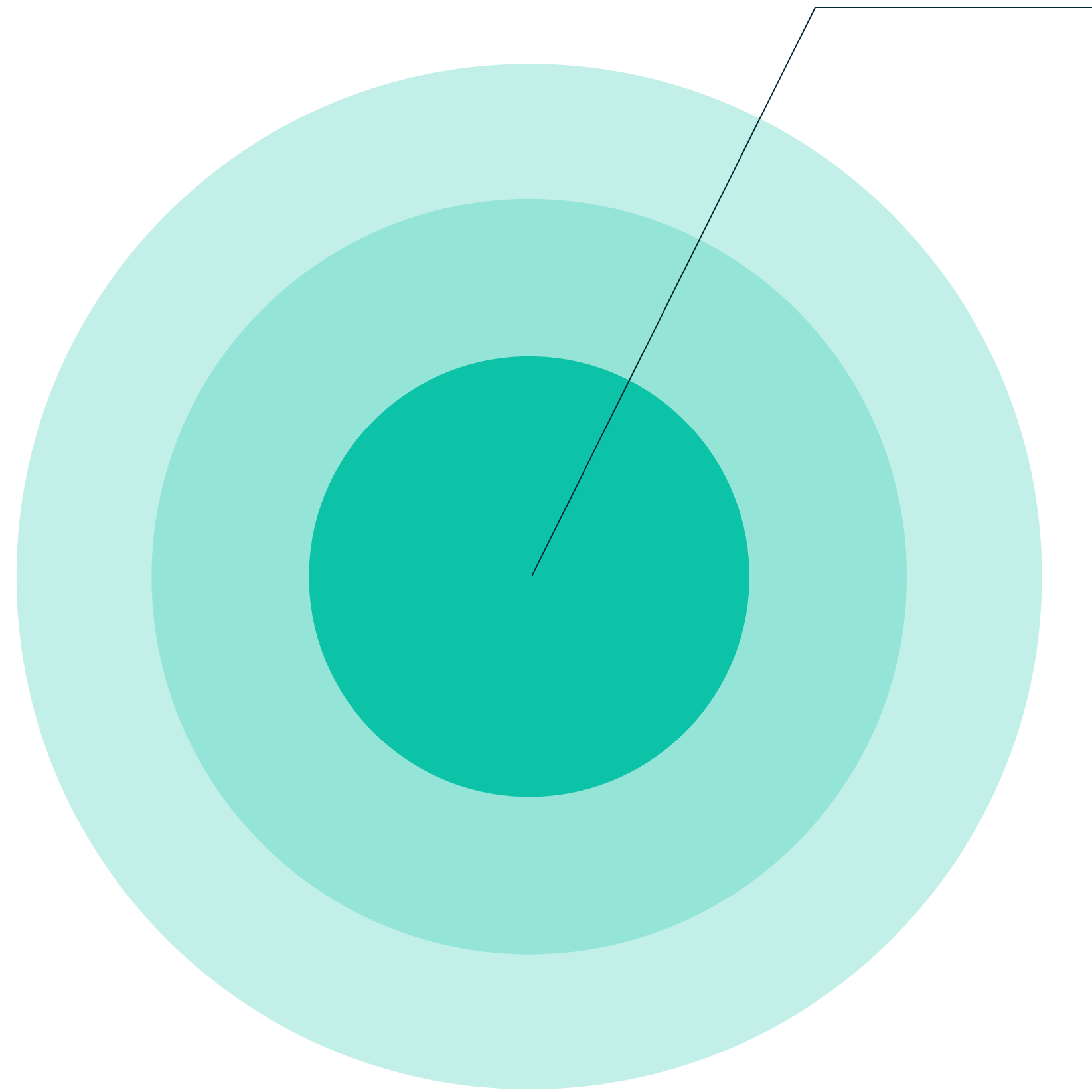
- Average order value in maternity categories - lagging
- # of cross-category purchases - lagging

Engage - *continued use of services*

- Retention rate of parents using registry & health services in first year - lagging
- Registry completion rate - lagging

Appendix F: Golden Circle Analysis

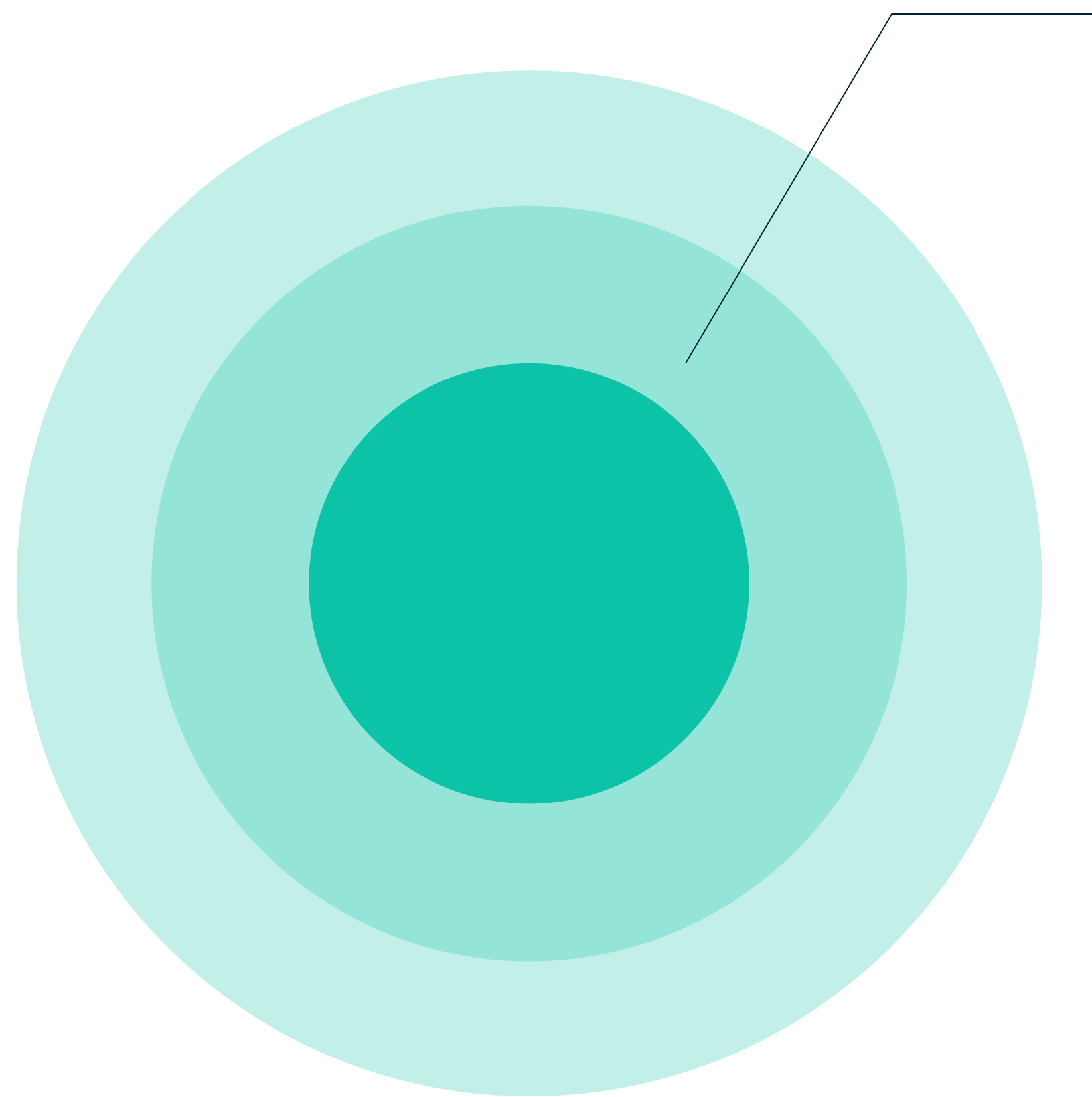
Golden Circle



Why

Amazon Health Services aims to make healthcare drastically **simpler to empower customers** and **provide resources to stay healthy.**

Golden Circle

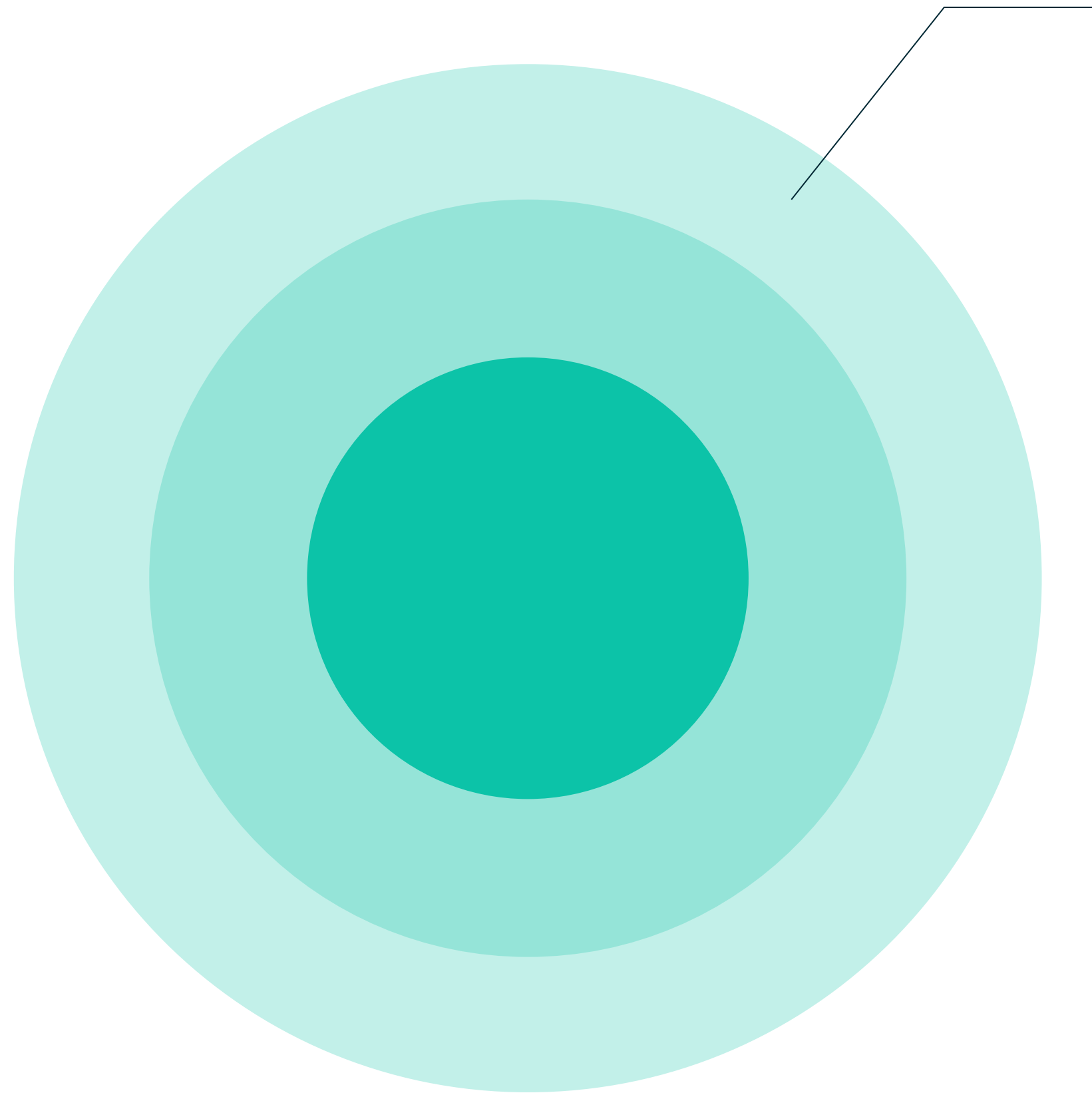


How

Amazon Health Services' 4Cs:

- **Curated choice:** Helps customers identify relevant and available programs
- **Convenience:** Quick access to healthcare services and products
- **Cost clarity:** Transparent prices prior to receiving care
- **Care continuity:** Provides ongoing support with a centralized offering of healthcare services and products across Amazon's ecosystem

Golden Circle



What

- **One Medical Membership & PPV:** 24/7 digital healthcare
- **Amazon Pharmacy:** Affordable medication and refills, delivered to your door
- **Amazon Benefits Connector:** Checks coverage and guides users to eligible health programs

❖ one medical

amazon pharmacy

Appendix G: 5Cs Analysis

Company

Amazon Health Services exists to remove the friction people face when accessing healthcare by making it radically more **accessible, transparent, and convenient** - just like shopping on Amazon.

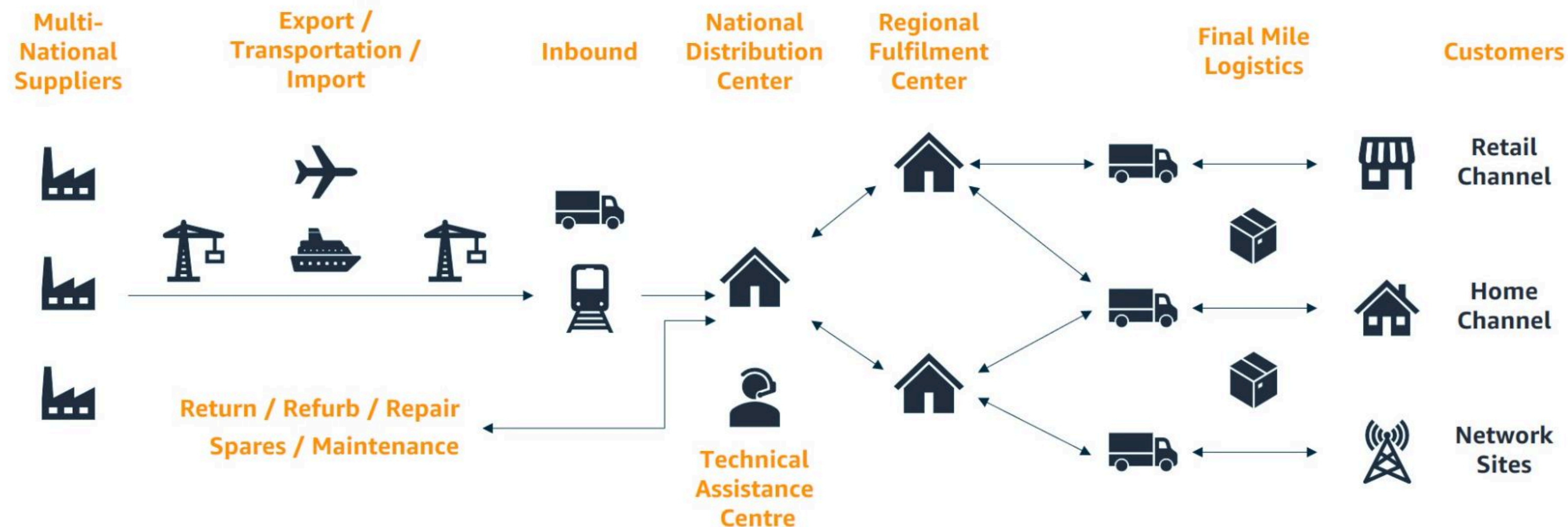
Our mission is to empower everyone to stay healthy by offering curated care options, upfront pricing, and seamless integration across services such as *One Medical Membership, Amazon Pharmacy, and Amazon Health Benefits Connector*.

By combining personalized support with digital convenience, we **simplify the healthcare experience** and give people **control over their well-being**.

Collaborators

Amazon Key Collaborators

- Suppliers and Manufacturers
- Warehouse/inventory management
- Delivery services: Amazon Logistics or third-party carriers, UPS and FedEx.
- AWS (Amazon Web Services) Team
 - Amazon's cloud computing platform that optimizes logistics



Collaborators

Amazon Health Services Key Collaborators

- Health Appointments (Membership & PPV) → **One Medical** 
 - Acquired in 2023
 - Provides medical professionals and in-person locations
 - Specialized care from established partners such as Cleveland Clinic
- Amazon Pharmacy → **PillPack** 
 - Acquired in 2018
 - Established medication delivery service
 - Discounts on prescription medications using partner InsideRx
- Amazon Benefits Connector → **Benefit Provider Partners**
 - Programs for common healthcare conditions
 - Diabetes, blood pressure management, physical therapy, etc.

Customers

Target customers

- Everyday individuals seeking healthcare services
- Amazon shoppers are currently located worldwide and largely span 18-60 years
- Challenge: New and expecting parents seeking maternal and postpartum care

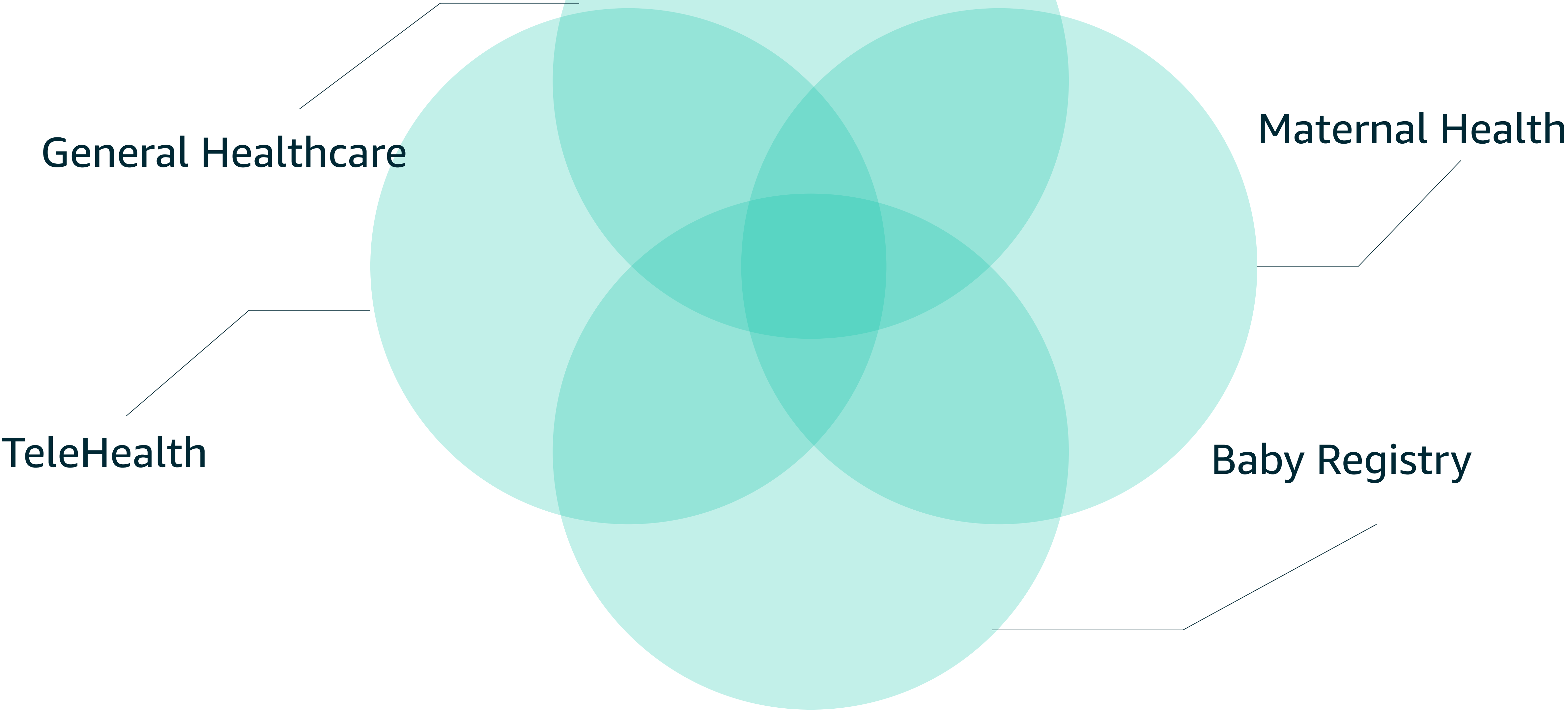
Key customer segments

- Younger generations (Gen Z, Millennials)/Tech-savvy adults
- Seniors, caregivers, and chronic illness patients
- Challenge: Parents in perinatal and postnatal stages

Market

- US healthcare market valued at approximately \$4.9 trillion in 2023
- Virtual healthcare market projected to reach \$54 billion in revenue this year
- After COVID-19 pandemic, both digital health and healthcare e-commerce markets projected to grow at CAGR of upwards of 15%
- Challenge: Maternity products industry valued at \$42.1 billion in 2023

Competitors





Competitors (General Health, Direct)

	Retail clinics, pharmacy, digital RX management, RX delivery	Significant omni channel presence, probably AHS's biggest direct competitor → 1019 physical locations
	In-store clinics, pharmacy, potential primary care, RX delivery	Has some physical presence due to Walgreens but digital and delivery experience is less mature, failing → 440 physical locations
	Health insurance, analytics, physician groups, employer solutions	Scale + data but is less consumer-facing than Amazon Health
	Retail walk-in clinics in grocery stores, basic diagnostics, vaccinations, and physicals	Convenient location-based access but lacks deep tech stack or any scalable virtual care

Competitors (General Health, Indirect)

	Activity tracking, health records, cycle tracking, user health data	Preventative focus and lacks clinical capabilities
	AI diagnostics, wellness tracking, enterprise health solutions, generally similar to Apple Health	Strong data and AI but limited user trust and user base in the digital health context (Apple Health wins because of the larger phone market share Apple has)
	Trusted medical content, second opinion services	High brand equity in specialty care but is less scalable and there's a certain distrust/skepticism
	Inpatient & outpatient care, specialty services, emergency care	Entrenched default but Amazon does partner with a lot of them (19) <i>Amazon has to beat traditional hospitals on convenience and cost!</i>

Competitors (Telehealth, Direct)

	On-demand virtual visits, chronic care, mental health, mobile app	Trusted name with diverse services but expensive and less agile
	White-label telehealth platform, AI intake, provider integrations	Strong in hospital systems & payers but has weaker consumer branding
	Free telehealth that is HIPAA compliant, easy onboarding	Popular with small practices but lacks advanced features
	EHR system with embedded telehealth (MyChart), patient communication, appointment scheduling, API support	Entrenched in hospitals, controls patient data flows. Not consumer-first but a gatekeeper to care access. <i>Amazon will need to interoperate with Epic to access patient histories due to its large presence</i>

Competitors (Telehealth, Indirect)

zoom Healthcare	HIPAA-compliant video calling, widely used post-COVID	Not purpose-built for medicine so it lacks integrations and medical UX
PHILIPS Healthcare	Remote monitoring, patient data integration, diagnostics	Clinical-grade tools but is not widely adopted for general telehealth
ro	DTC care: men's/women's health, hair loss, ED, fertility testing, weight loss	Lifestyle-forward, pharmacy-integrated; strong UX but narrower scope
hims & hers	Telehealth for birth control, sexual health, hair, skincare, mental health	Accessible and brand-driven; high customer loyalty in wellness, not full medical care

Competitors (Maternal Health, Direct)

	Full-spectrum virtual care for fertility, maternity, postpartum, and pediatrics	Largest virtual clinic for women + families, strong B2B and employer partnerships, well-funded and expanding ** <i>Amazon partnership</i>
	Hybrid OB + midwifery clinics with remote care platform	Primarily based in NY, associated with Goop Human-centered pregnancy experience with an innovative model
	Pregnancy and fertility tracking, parenting tools, B2B employer benefits	Data-rich and widely adopted in HR wellness programs, strong engagement but not a care provider (app)

...there's lots more to cover! Maternal Health can cover cycle tracking (pre), pregnancy healthcare (during), and baby health (post)

Competitors (Maternal Health, Indirect)

	Full-spectrum maternity care including delivery, OB/GYN, NICU, etc.	Trusted and entrenched option Dominant infrastructure but fragmented digital / UX presence
	Global maternal health innovation and equity initiative	Shapes policy and funds impactful maternal health solutions but is not a direct care provider
	Menstrual and fertility tracking that is directly integrated with iOS and WatchOS	Strong early engagement and retention (through ecosystem) but lacks care delivery and physical services
	Pregnancy content, community forums, week-by-week tools	Controls early-stage attention and influences maternal health literacy, high behavioral engagement, community support

Competitors (Baby Registry)



has the largest market share by far!
(45%)

	Universal registry, curated content, gift boxes, product guides, postpartum care directory	Strongest competitor Editorial + content-driven UX
	Universal registry, in-store welcome kits, physical retail	Trusted big-box brand with strong in-store support but is less flexible than Amazon
	Budget-friendly universal registry, app UX, large store footprint	Competes on price but has a weaker digital experience
	Focused on furniture, premium decor, gifting	Not full registries but is a top premium brand

Context

Political

- Telehealth Policy
 - Temporary extension of COVID-era policies for geographic flexibility
- Reproductive Health Policy
 - Executive Order 14182 reinstating Hyde Amendment → ends federal funding for abortion
 - SCOTUS' pending decision on South Carolina's attempt to block Medicaid funding to Planned Parenthood



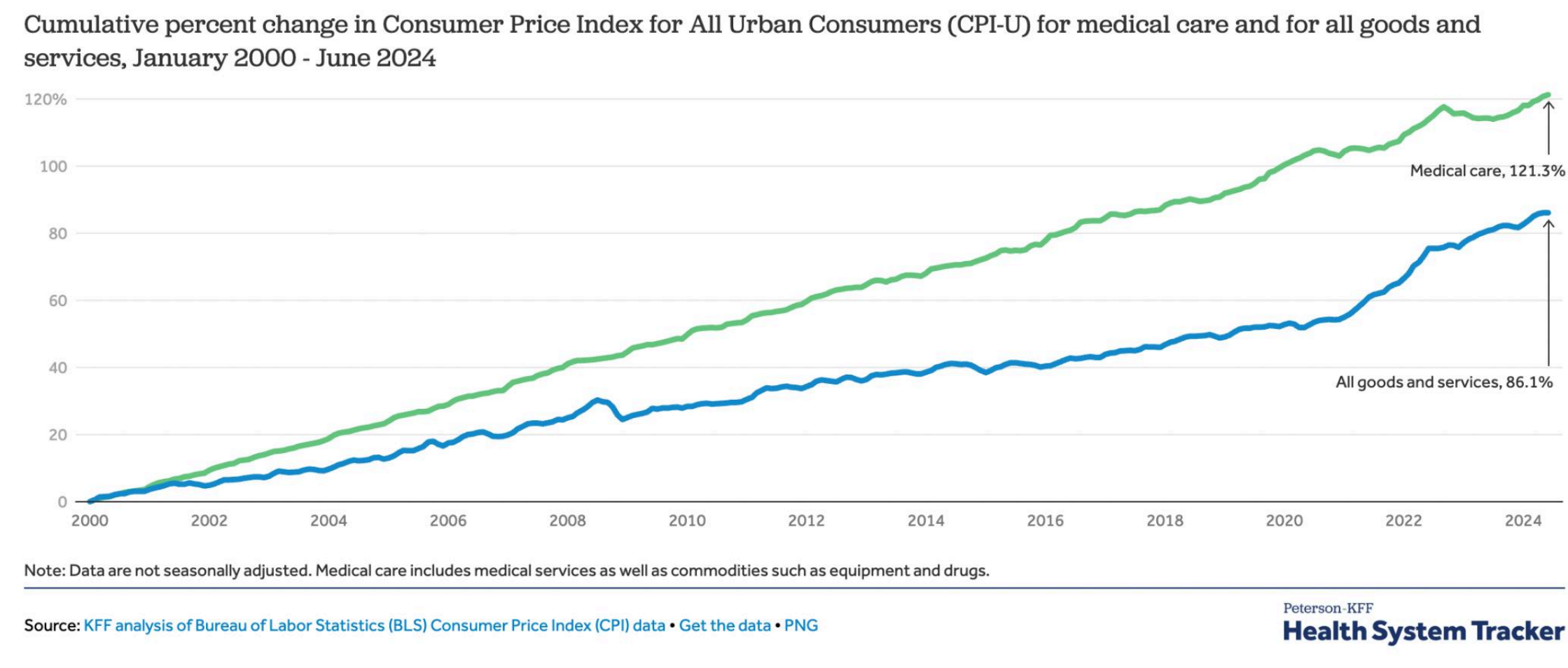
Implications

- Congressional **lobbying efforts** to make temporary extensions **permanent**
- Monitor **regulatory risks** in providing care in more **restrictive states**

Context

Economic

- Medical Cost Inflation
 - Medical service pricing has been outpacing inflation
 - Increased consumer sensitivity to out-of-pocket costs and price hikes



Action

- Address patient needs with **price transparency** and **Health Benefits Connector** (to maximize insurance benefits)

Context

Social

- Racial Inequities Affecting POC
 - Unequal access to quality care
 - Higher rates of pregnancy complications
- Gender-Based Differences
 - Underdiagnosis of women's health concerns
 - Women are the primary healthcare decision-makers
- Social Media's Influence on Consumer Behavior
 - 46% of purchase products through social media (increased more than 2x since 2019)

Action

- Promote **maternal care and digital health services** via **social media** to **reach underserved groups and empower women**



Context

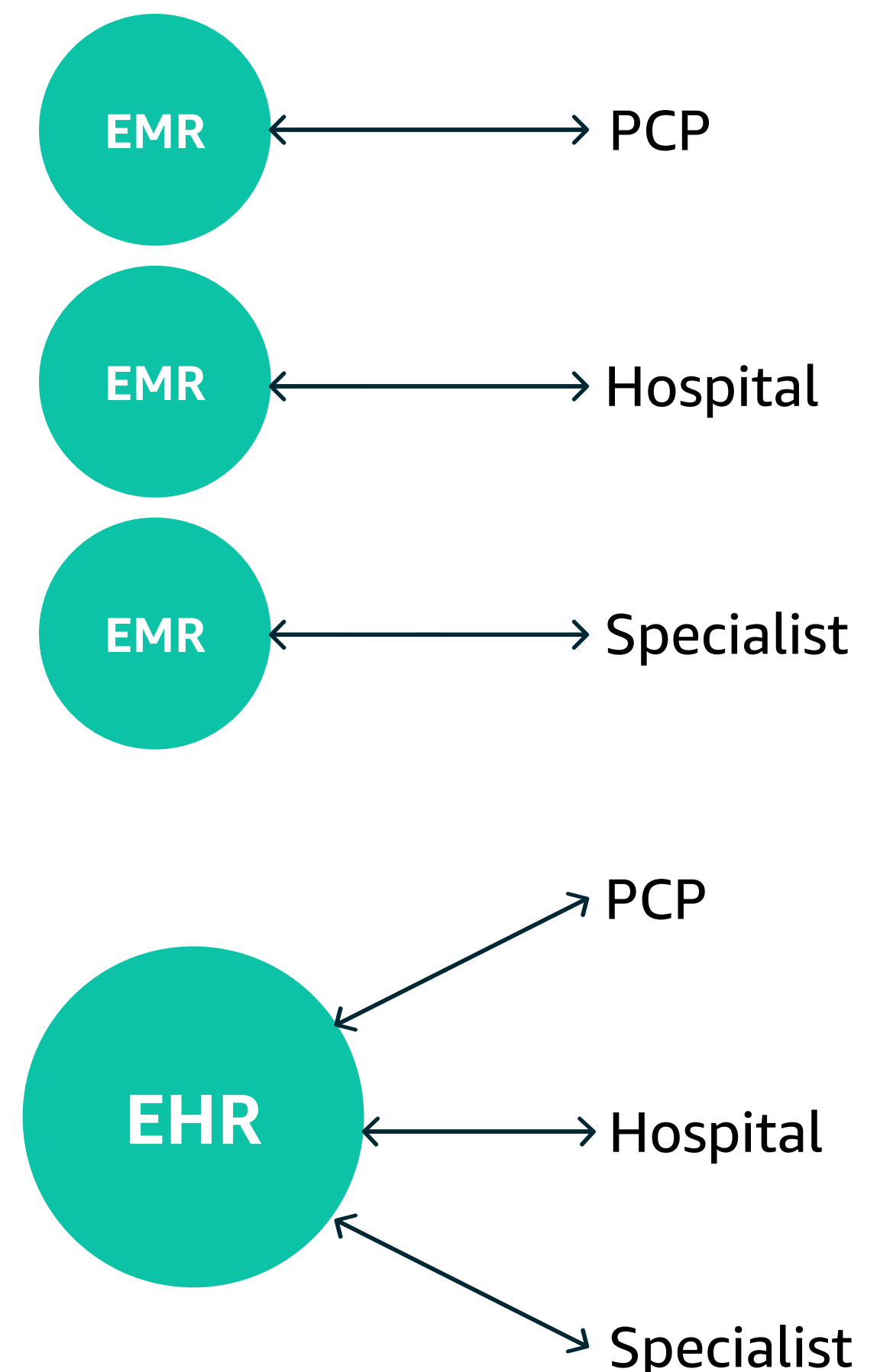
Technological

- Use of AI models in diagnostics
 - Bayesian network models still do not have human intuition
- Push for Electronic Health Records (EHRs)
 - Rather than Electronic Medical Records (EMRs) to allow interoperability between providers
- Rise in women's health tech & data collection
 - Wearables and at-home testing

Implications

- Prioritize **AI-driven tools** and **interoperable EHRs** that enhance decisions, enable data exchange across providers, and embed data collection from one's home

EMRs vs. EHRs



Context

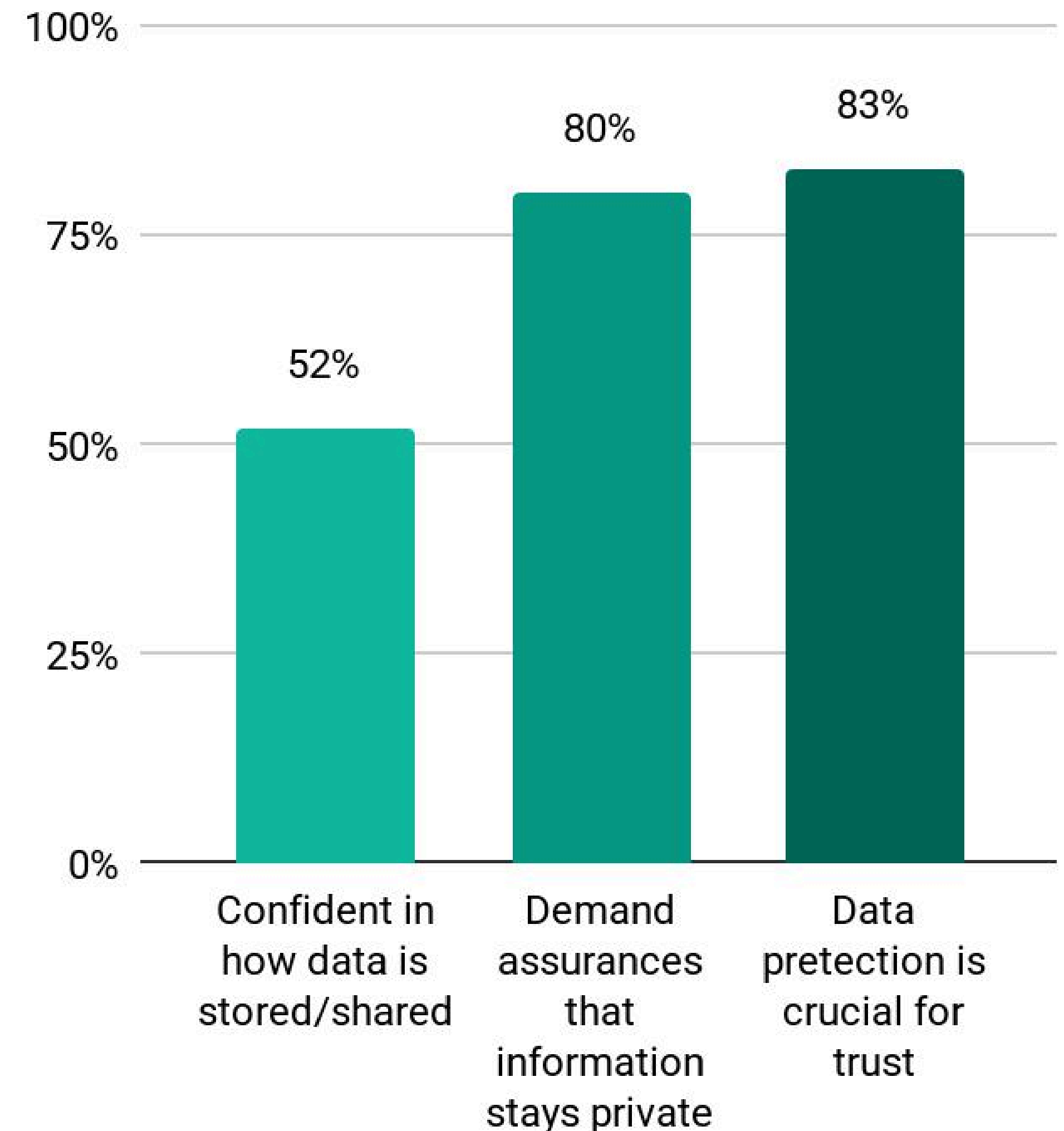
Legal

- HIPAA compliance, data breach liability
 - Oracle hospital data breach lawsuit
- Informed consent and privacy assurance
 - Varied by state, particularly for telehealth practices
- Rising legislation around women's health

Implications

- Ensure **security, transparency, and legally adaptiveness** across states

Public Sentiment on Data Privacy



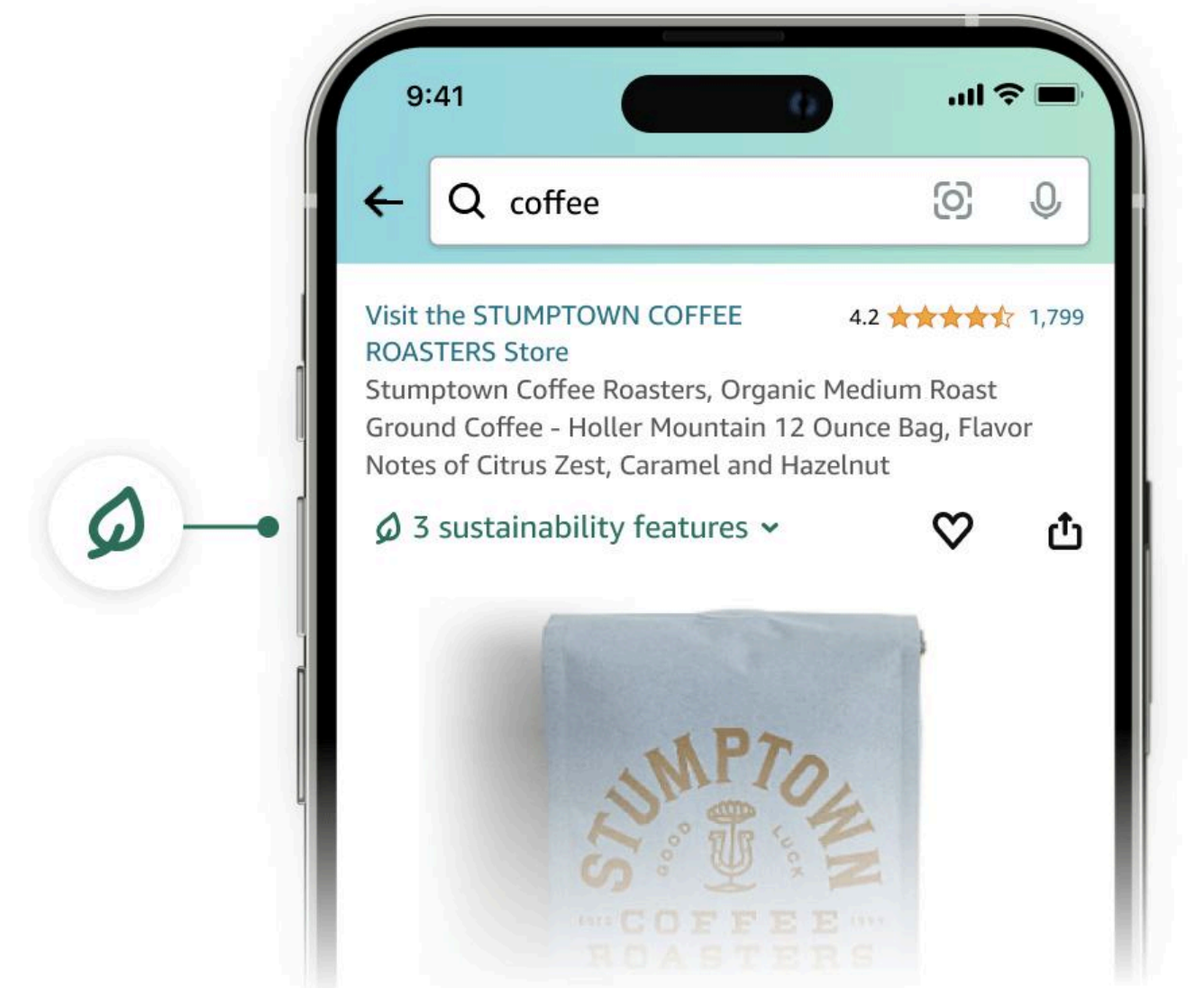
Context

Environmental

- Telehealth saves carbon by eliminating travel to in person appointments
 - 0.72-372 kg carbon saved per visit
- Green consumption
 - Women are more likely to be "green consumers" than men
 - Public willing to pay 9.7% sustainability premium
- Amazon's Climate Pledge: net zero emissions by 2040

Implications

- Align pharmacy/registry **packaging, production and shipping** emissions Pledge goals
- Prioritize **telehealth > in person** for emission saving
- Showcase products with **Climate Friendly Label**



Sources

https://docs.google.com/document/d/1u_jcn6Q5Eaevi7TDXFjVG66CtBf4pavplKKaJeRVqt8/edit?tab=t.0