

# THE EDIT Q4 2022

Welcome. Part of Propeller's mission and promise is to be at the forefront of digital. We consistently strive to bring innovation and creativity to our healthcare partners and their customers.

It is in this spirit that we curate a quarterly experience, strategically selecting the latest, most important digital marketing trends and tech innovations—and assess the impact each of these has in healthcare, and why it's important for you to know, now.

Together, let's be experts and so on the Pulse!

## New Age Customer Experience

### OVERVIEW

As technology evolves and we move toward a more advanced world, meeting customers where they are and how they want to be reached is more important than ever. In this edition of **Propeller Pulse: The Edit**, we explore **New Age Customer Experience**. We'll discuss how brands will be redefining their strategies to be a pioneer in what is next—digital humans, Web3, and home delivery, all while delivering on hyper-personalization and a sense of community. We dive into the impact these trends will have and how to adopt them today.

[Download the PDF](#)

## TREND #1

### DIGITAL HUMANS

Emulating real-life characteristics to power connections

#### What is it?

- Digital humans are virtual avatars powered by artificial intelligence (AI) and machine learning that are used to generate human interactions in the online space
- While technologies like chatbots and virtual assistants have improved in recent years, digital humans are taking over because they encompass what people crave—the human elements—and strengthen connections to the digital world
- According to UneeQ, digital humans can mimic 92% of emotional connections that are [not shown through words](#) (38% through tone of voice and 55% through facial expressions)
- Digital humans will play an integral part in our lives, leveraging data that inform behavior and scaling consumer interactions and experiences in a personalized, empathetic way that hasn't been possible before
- Right now, digital humans are being deployed as brand ambassadors, digital influencers, digital twins of celebrities, customer support representatives, healthcare advisors, and more—and their use will expand to assistants, teachers, and even digital human twins of every real person that will exist in the future

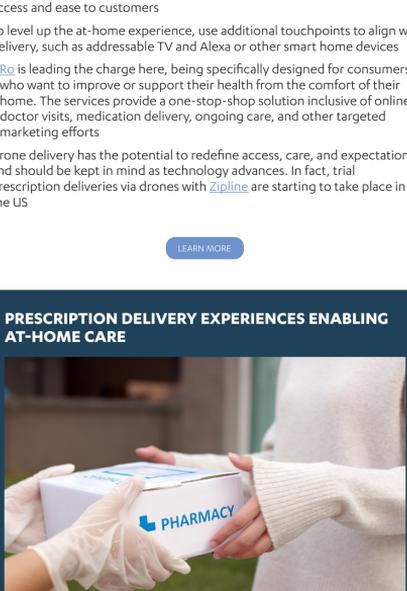
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#### What it means for healthcare

- Digital humans are working in healthcare to create supportive, accessible, and meaningful interactions in a digital world
- They make it possible to recreate natural human interactions at scale—screening patients, providing education, or answering questions 24/7—to alleviate the burden of front-line staff
  - By 2026, the healthcare industry in the US will need 11.6 million workers to meet the demand for new clinicians. According to Accenture, AI can cover 20% of those needs while saving \$150 billion a year. Digital humans can lower costs and improve efficiencies
- The emotional connection that digital humans provide is specifically important in the healthcare space, bringing empathy and compassion to AI. They never judge, are accessible to all, and can offer companionship. They're inherently built to combat [health illiteracy, disability access, and aged-care challenges](#)
- Digital humans can impact the healthcare industry in countless ways, including
  - Managing prescriptions, monitoring treatment, or providing check-ins via a "Talk to your digital doctor" tool
  - Assisting HCPs in training, education, and gathering information/questions from patients
  - Providing forms of therapy where people may feel more comfortable talking to an avatar than to a real person
  - Serving as digital product experts, digital pharmacy assistants, and digital hospital guides
- Since digital humans are backed by AI, they can interpret patients' or HCPs' input and supply not just the needed information but the appropriate nonverbal responses that users would expect

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### SPECIFIC HEALTHCARE SOLUTIONS WITH A HUMAN TOUCH



Two companies to spotlight driving the world of digital humans:

**UneeQ**  
A digital-human platform with specific solutions for healthcare to power patient experiences. Two of UneeQ's digital human creations are:

- Cardiac Coach:** Provides 24/7 support for those recovering from a cardiac issue
- Digital John Kirwan:** A digital human twin of co-founder and rugby legend Sir John Kirwan, who's always available to give mental health support

**Soul Machines**  
A leader in the humanization of AI and the only company with a patented digital brain and autonomous animation technology, Soul Machines delivers the full capabilities and goodness of human and machine collaboration in a responsive, relatable, and unprecedented way

- Soul Machines digital humans can help healthcare organizations scale customer support, augment workforce, improve customer data, and drive brand engagement. [Watch here for more.](#)

## TREND #2

### WEB3

Embracing the internet evolution

#### What is it?

- Web3 is the newest phase of the internet, built on decentralized blockchain, which is the shared ledger system used by cryptocurrencies
- It has evolved from the previous iterations of the internet (Web1 and Web2) to include concepts such as decentralization, blockchain technologies, and token-based economics, making concepts like the metaverse, NFTs, AI and machine learning, and digital twins possible
- Web3 gives the power back to users. Users can now monetize actions like never before
  - For example, **Helium** is a crowdsourced wireless network. In exchange for sharing a user's WiFi bandwidth by plugging in a special device to their computer or router, they can earn Helium tokens when their hotspots are utilized
- Expect to hear a lot about Web3 in the next few years as people try to get their heads around the world of new experiences, platforms, and money-making opportunities that crypto enthusiasts are trying to create

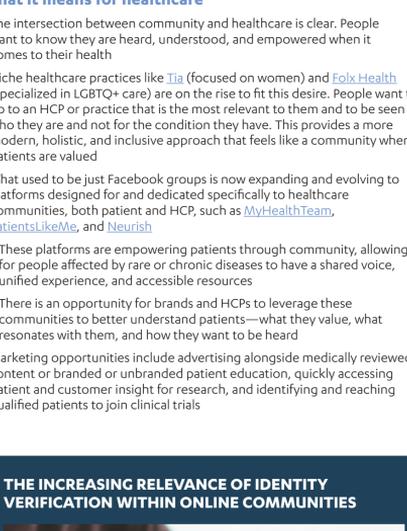
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#### What it means for healthcare

- While we know that changes are coming quickly, little is known what the full impact and opportunities of Web3 mean for healthcare
- The data stored in Web3 is distributed, personalized, and traceable, eventually bringing transparency, accessibility, and affordability to the healthcare ecosystem
- Web3 can provide the infrastructure through which patients can own and provide access to their personal health data to a wide array of stakeholders (eg, physicians) and third-party apps, enabling access to patients' records in a timely and less manual fashion ([Pharm Exec](#))
- While there is currently a very wide range of adoption levels, it will become even more important to embrace the excitement around Web3 and the more patient-centric customer experience opportunities that it will bring. Areas of Web3's impact on pharma and suggestions for getting started include:
  - Understanding the benefits of digital twins and using them to advance drug research, production, and manufacturing
  - Leveraging blockchain technologies for supply-chain transformations
  - Leaning in to a more patient-centric approach. With Web3, patients can own, control, and possibly profit from their digital medical records
  - Creating digital assets of virtual goods ranging from prescription drugs to personal care products and selling them as NFTs (see [The Edit Q2 2022](#))
  - Interacting with patients and HCPs in the metaverse (see [The Edit Q2 2022](#))

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### APPLICATIONS AND ADVANCES WITH BLOCKCHAIN



Blockchain is impacting supply-chain transformations to better trace drugs, minimize counterfeit drugs, and simplify drug recalls. Examples of where we have seen this so far:

- Novartis** identifies counterfeit medicines and tracks temperature with real-time visibility for all participants in the supply chain using blockchain technology
  - Merck** has a blockchain patent on its own, covering technology for preventing counterfeit drugs by increasing supply-chain security
  - IBM** announced that it is working with KPMG, Merck, and Walmart to develop a pharmaceutical blockchain platform that can track drugs as they move through the global supply chain
- Other projects in the works are leveraging blockchain capabilities to create a compatible system where multiple parties, including manufacturers, wholesale distributors, hospitals, and pharmacies, can register, verify, and transfer pharmaceutical products with absolute trust in their authenticity and provenance

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## TREND #3

### HOME DELIVERY

Embracing immediacy and convenience

#### What is it?

- Home delivery is bringing items to where people are rather than people picking up from a store, enabling them to get what they want, when they want, without leaving home, and giving a whole new meaning to convenience
- The increased demand and options for seamless delivery services across various industries have completely changed people's expectations
  - For food delivery, fast isn't fast enough, which led to the emergence of GoPuff, promising delivery in minutes
  - Amazon has increased options for same-day delivery
- Along with convenience, home delivery can provide access for consumers who wouldn't otherwise have it
- Living into the benefits of home delivery, products and companies can ensure more immediate access to their services. Take e-commerce for example, especially on social platforms such as Instagram and Facebook
- Social e-commerce companies within the platform such as click-to-buy provide opportunities to get the user what they want without having to leave to another site

#### What it means for healthcare

- While prescription delivery is a big change for the healthcare industry, and by no means a quick or easy adoption, customers are demanding it. As pharma looks ahead, delivery is a huge part of its future, projected to reach \$434.3MM by 2030
- Today's leading [prescription delivery services](#) include Amazon Pharmacy, Capsule, PillPack by Amazon Pharmacy Service, CVS Pharmacy Prescription Delivery, NowRx, AllianceRx, Walmart Pharmacy, ZipDrug, Express Scripts, and Cost Plus Drugs
- With convenience at the forefront of consumerism, healthcare brands need to develop effective distribution networks through the opportunities that home delivery can bring. For brands that are unable to offer white-glove delivery because of drug administration limitations, explore sending other products to the front door that complement treatment (eg, lotion, clothes, healthcare items)
- Healthcare companies and HCPs can partner with delivery services to provide more convenient, personalized, and branded experiences (eg, QR codes in the delivery box linking to tutorial videos, messages from doctors, or supporting resources) to reinforce their position in providing more access and ease to customers
- To level up the at-home experience, use additional touchpoints to align with delivery, such as addressable TV and Alexa or other smart home devices
  - Ro** is leading the charge here, being specifically designed for consumers who want to improve or support their health from the comfort of their home. The services provide a one-stop-shop solution inclusive of online doctor visits, medication delivery, ongoing care, and other targeted marketing efforts
- Drone delivery has the potential to redefine insurance, care, and expectation, and should be kept in mind as technology advances. In fact, trial prescription deliveries via drones with [Zipline](#) are starting to take place in the US

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### PRESCRIPTION DELIVERY EXPERIENCES ENABLING AT-HOME CARE



These prescription delivery systems not only assist in providing round-the-clock customer service but also help manage dosage and therapy adherence and provide feedback to clinicians.

**Capsule**  
Prescription delivery service is changing medication access for the better. Key features include:

- Delivering medications straight to the front door
- Communicating via text, phone, email, or chat with a pharmacist at the patient's convenience
- Tracking refills
- Coordinating with the patient's doctor and insurance so they don't have to

**Cost Plus Drugs**  
Ships prescriptions to patients nationwide with a seamless consumer experience. Features include:

- Standardized pricing, whether a patient has insurance or not, with the possibility to redefine the industry by driving drug costs down
- Offering more than 800 generic drugs, although the lack of brand-name drugs is [holding it back from its full potential](#)
- Working with trade name manufacturers to add both single-source brands and specialty biologics to its pharmacy

## TREND #4

### HYPER-PERSONALIZATION

Delivering on highly individualized experiences

#### What is it?

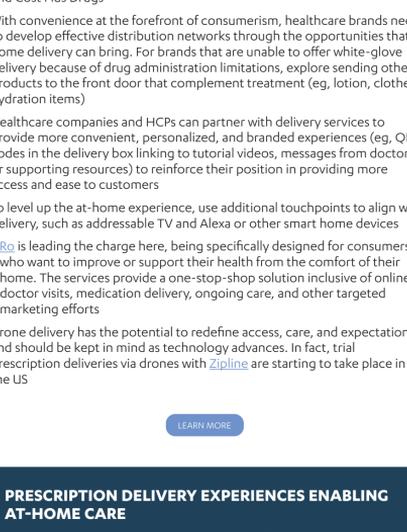
- Hyper-personalization is the most advanced way brands can tailor their marketing to each consumer. It treats everyone as individuals with distinct tastes and preferences, enabling brands to provide a truly unique customer experience
- Email personalization and banner variants are no longer cutting it. The level of customization that consumers demand now is much higher, and hyper-personalization can help achieve it
  - For example, personalized product recommendations or discounts can be shared using unique customer data such as psychographics or real-time engagement with a brand
- With the growing demand for data privacy, platforms need to find a way to increase personalization without compromising privacy
- The impending loss of third-party cookies is an opportunity to [refocus personalization efforts around first-party data](#)

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#### What it means for healthcare

- The demand for hyper-personalization shines bright within the healthcare industry. As patients' needs, wants, and desires increase, bespoke care solutions will evolve to meet expectations and provide individualized care
- While segmentation creates customer groups based on shared beliefs, likes and dislikes, and activities, hyper-personalization focuses on small differences that can be used to target patients at the individual level instead (eg, personalized product recommendations or unique discounts that can be shared using customer data)
- Healthcare has the opportunity to create platforms that provide 360° customer experiences, similar to those that exist for travel and finance (think planning a trip and having flight info, restaurant reservations, and hotel bookings all within one app). By creating a singular space that has a patient's health records, HCP information, appointment reminders, and prescriptions, the healthcare journey will become streamlined and patient-centric
- Thinking forward to when third-party cookies are removed, companies like [Evermed](#) can lead the way as they offer personalized education hubs leveraging first-party data, giving a data advantage over a platform such as YouTube
- According to Adobe, 77% of consumers are willing to go to a different provider (or go outside of their plan network) to find a better digital, personalized experience. Thus, online platforms like [Twill](#) are seeing tremendous success as they are built on providing personalized care plans for each patient, when they need it, and in the way they want
  - Twill uses "sequences," which is what they call the combination of evidence-based digital therapeutics, data and behaviors from care communities, live coaching and telebehavioral health, and third-party services to weave together a more personal, seamless, and connected care experience for each consumer

### INTEROPERABLE PLATFORMS INFORM HYPER-PERSONALIZATION



Interoperable platforms gather data from multiple sources and create a hyper-personalized patient profile that can provide insights and actions in patients' healthcare journeys based on unique preferences. Two examples of interoperable platforms are:

**b.well**  
The first people-powered platform, transforming the way people interact with the healthcare system

- Bridges the gap between consumer expectations and business needs
- Aggregates all of a patient's data, predicts and defines care needs based on consumer health data, creates a care network, and offers next-step suggestions based on unique preferences
- Benefits healthcare organizations by unifying all digital front-door solutions and third-party devices through a single, branded interface, ultimately providing a personalized and seamless customer experience

**ONVY**  
AI health coach app that provides a hyper-personalized, cross-brand overview of a patient's health data

- Contains predictive health insights combined with science-based health and mindfulness exercises
- Learns from patterns and correlations between a patient's digital biomarkers, environmental data, and behavioral health to show causation and relevant correlations in order to figure out why are they feeling the way they are and how can they improve

## TREND #5

### NICHE COMMUNITY

Connecting people in closed environments and with shared experiences

#### What is it?

- Niche communities are smaller groups of people with specific interests who come together online to build relationships and a shared sense of belonging
- As the world moves toward more advanced digital and virtual experiences, demands for a greater sense of belonging and community will continue to be a focus
- Technological advancements are enhancing user experiences, but at the same time they are allowing for more native collaboration to be built in
- 2023 will bring more community building and create more loyal, engaged, and connected consumers. Platforms are evolving, and new ones are rising to enable niche communities, purposeful connections, and an authentic sense of belonging
- Social platforms such as Facebook, Instagram, and Twitter were the beginning of social communities amid streams of content, but new platforms such as [Discord](#), [Signal](#), and [Geneva](#) are focusing solely on more genuine connections and no content streams
  - Discord is a communications app that lets users share voice, video, and text chat with friends, game communities, and developers in private chats or a set of communities called "servers"
- 92% of Americans use Discord at least once a week. The demand for community is there and it will continue to rise

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#### What it means for healthcare

- The intersection between community and healthcare is clear. People want to know they are heard, understood, and empowered when it comes to their health
- Niche healthcare practices like [Tia](#) (focused on women) and [Folx Health](#) (specialized in LGBTQ+ care) are on the rise to fit this theme. People want to go to an HCP or practice that is the most relevant to them and to be seen for who they are and not for the condition they have. This provides a more modern, holistic, and inclusive approach that feels like a community where patients are valued
- What used to be just Facebook groups is now expanding and evolving to platforms designed for and dedicated specifically to healthcare communities, both patient and HCP, such as [MyHealthTeam](#), [PatientsLikeMe](#), and [Neurish](#)
  - These platforms are empowering patients through community, allowing for people affected by rare or chronic diseases to have a shared voice, unified experience, and accessible resources
  - There is an opportunity for brands and HCPs to leverage these communities to better understand patients—what they value, what resonates with them, and how they want to be heard
- Marketing opportunities include advertising alongside medically reviewed content or branded or unbranded patient education, quickly accessing patient and customer insight for research, and identifying and reaching qualified patients to join clinical trials

### THE INCREASING RELEVANCE OF IDENTITY VERIFICATION WITHIN ONLINE COMMUNITIES



- As communities expand and evolve, verification can help ensure that interactions stay real and authentic
- Creating a safe and secure space within these communities is crucial to their success. As the challenges of privacy persist, we predict that verifications will span to these communities, no matter how niche they are
- Verifications can help manage these communities and ensure they don't lose the sense of belonging and trust they were founded on, holding true to the genuineness of the connections and interactions

### PROPELLER'S CURATION PROCESS

Propeller is passionate about identifying trends that are important for your business and customers—and we're always looking for the next big thing. We scour the internet and social platforms, read marketing handbooks, listen to what our clients are interested in, and look at what's being talked about in our healthcare industry. We use all this information to find patterns of what's popular, determine their importance, and carefully edit it down to a short-list of must-knows in digital marketing and technology.