REPORT

NRC Health 2021 Healthcare Consumer Trends Report: Pediatrics

NRC HEALTH | Human understanding

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A note from NRC Health Chief Growth Officer Helen Hrdy

TO OUR DISTINGUISHED PARTNERS IN PEDIATRICS,

Pediatric patients are an exceptional population. That's true in every year, but especially so in the year of a pandemic.

Without a doubt, pediatric providers across the country are grateful that their patients have largely been spared from COVID-19 itself. But that should not suggest that they have avoided the pandemic's impact.

To better care for pediatric patients in a post-COVID world, it will be helpful to pause and take stock. How have parental needs shifted in the months since COVID-19 began? How are they likely to evolve? And how can pediatric care organizations maintain meaningful connections with these customers—how can they achieve true Human Understanding™?

These are the questions that the **2021 Healthcare Consumer Trends Report: Pediatrics** will attempt to address. Included in this report are briefings on several topics of crucial importance to pediatric healthcare leaders, including:

This report explores these topics with insights gleaned from the country's premier pediatric healthcare-consumer database. Through millions of datapoints captured from hundreds of thousands of consumer households, it will lend insight into what this exceptional population wants—and needs—from its providers.

We hope it will prove useful to you as you formulate your strategies for this year and beyond, and that it will help to move your organization toward true Human Understanding™.

Sincerely,

Helen Hrdy

Helen Hrdy,
Chief Growth Officer, NRC Health

Contents

PART ONE:

The last holdout of brand loyalty

> "The care and concern that all the staff provided was excellent. This is always my first preference for where to bring my child."
>
> **—A parent in Georgia**

More than their counterparts in the general population, pediatric healthcare customers are quick to form attachments with their providers. Entrusting an organization with a child's health is a decision that no parent or guardian takes lightly; they often bring higher expectations to the encounter than they would in seeking care for themselves.

It's not altogether surprising, then, that pediatric consumers tend to be more loyal than the general population. According to NRC Health's data, **37%** of pediatric consumers express a preference for a specific healthcare brand. Compare this to the figure of 36% for adults in the general population.

37%

of parents strongly **prefer a doctor affiliated with a health system** to an independent doctor that is not affiliated with a health system.

Pediatric-consumer loyalty also appears to be slightly more resilient. Among adults, indifference to brand preference increased by about 5% from 2018 (31%) to 2020 (36%); in the same period, pediatric customers' indifference to brand preference increased by **only 4.3%**, from 32.6% in 2018 to 36.9% in 2020.

PEDIATRIC
INDIFFERENCE TO BRAND PREFERENCE

+4.3%

32.6% 2018 | **36.9%** 2020

ADULTS
INDIFFERENCE TO BRAND PREFERENCE

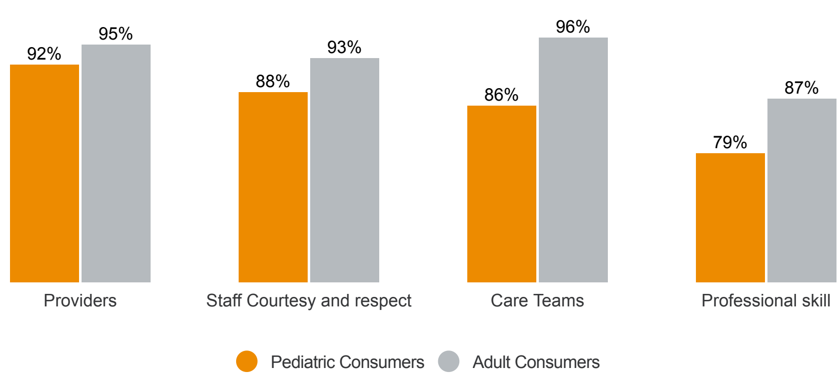
+5.0%

31.0% 2018 | **36.0%** 2020

These figures indicate that, while pediatric organizations seem to be faring a little better than their adult-care counterparts, pediatric brand loyalty is *not* immune to the broader shifts in the industry.

Pediatric healthcare consumers may be more loyal, but they also appear to hold their providers to a higher standard. Majorities of both pediatric and adult consumers have glowing sentiments about their clinicians; in pediatric populations, however, this majority is noticeably slimmer. (See the graph below.)

Percentage of positive sentiments from consumers



The trend is further reflected in pediatric consumers' priorities. For the general population, the top drivers of provider choice are *convenience factors*, like drive-time and appointment availability. For pediatric customers, the top driver is *quality*.

52% of parents report that "quality medical providers" is their primary motivator in selecting a provider, and **54.6% of them** say that "caring and compassionate doctors and nurses" is a key differentiator in the marketplace.

54.6%

of parents **identified caring and compassionate doctors and nurses** as the differentiator among pediatric hospitals

To earn and retain pediatric-customer loyalty, then, it appears that pediatric organizations have a much higher bar to clear.

PART TWO:

The telehealth take-over

"I was very pleasantly surprised about how happy I was with our visit yesterday. Didn't know what to expect, but would definitely do virtual visits in the future!"

—A parent in Wisconsin

Convenience may not be the primary driver of provider choice in pediatrics. But when it comes to convenient treatment *modalities*, pediatric customers are wildly enthusiastic.

As fear of the virus kept patients away from healthcare facilities and social distancing became the watchword of the hour, **telehealth and virtual care** saw an unprecedented surge in demand. What may surprise some, though, is that this demand was much more pronounced among pediatric customers, when compared against the general population.

The contrast in utilization rates is especially stark: **51% of parents** report using telehealth for a child's healthcare needs in 2020, compared to just **22.1% of adults** using it for their own care.

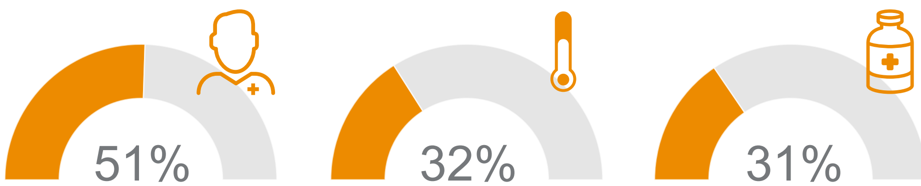
Parents use telehealth for their child's care but less for their care

of parents have used **telehealth for their child's visit**

of parents have used **telehealth for their own care**

Among pediatric telehealth visits, 51% were for routine visits, 32% for consulting about a specific ailment, and 31% for prescription refills and medication checkups.

Consumers have used telehealth for these pediatric encounters



Routine check-up with primary care provider/pediatrician

Sick visit with primary care provider/pediatrician

Prescription refill appointment or medication check

There was a striking difference in consumer enthusiasm as well: **76.3% of parents** report excitement about telehealth services for their children, versus just **53.7%** of adults.

Parents are more excited to use telehealth than the general population.

Here again, however, pediatric leaders should take note of a pronounced gap in positive sentiment regarding telehealth encounters. In 2020, 94% of adults who attended a telehealth visit had positive things to say. For pediatric consumers, that number was only **88%**.

88%

of pediatric consumers have **positive feedback on their telehealth visit** which is lower when compared to adult visits (94%)

Again, it's reasonable to speculate that this discrepancy arises from pediatric consumers' higher standards for their care. But what exactly made the difference between a positive encounter and a negative one? Consumer comments, derived from over 120,000 pediatric telehealth encounters, lend some insight:

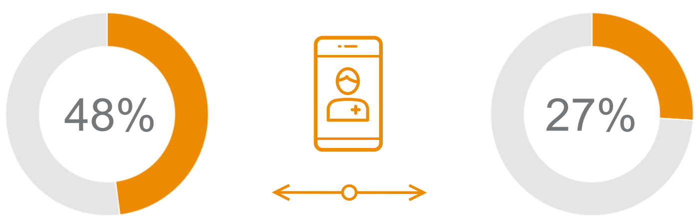
Pediatric telehealth consumers enjoyed:

- Nurses involving family members
- Smooth check-in processes
- Responsiveness to the child's unique needs

Pediatric telehealth consumers did not like:

- A perceived dip in professional skill
- When clinicians seemed disengaged
- Courtesy and Respect of the provider

Finally, while 2020 was unquestionably a banner year for telehealth services, the longevity of this success remains an open question. That said, pediatric leaders have good reason to be optimistic about virtual care's future: **48% of parents** plan to use e-visits for their children in the future, compared to just 27% of adults in the general population.



48% of parents plan to use **e-visits for their child** as an alternative in the future

27% of all adults plan to use **e-visits for their own care** as an alternate in the future

Since nearly half of customers are enthusiastic about telehealth, pediatric organizations would be well-advised to offer it—and to design their virtual care experiences to emphasize empathy, convenience, and professionalism.

PART THREE:

Digital engagement for the pediatric customer

> "The doctor and his staff were incredible. Took time to help my daughter download an app on her Apple Watch and on her phone to aid in capturing her symptoms."
>
> **—A parent in Kentucky**

Telehealth, of course, is by no means the only innovation making waves in the healthcare industry. When it comes to looking after their children's health, parents and guardians are embracing a wider gamut of digital solutions than they ever have before.

Two domains of digital services are especially relevant to the modern pediatrics customer: wearable technologies and social media.

WEARABLES AND KIDS

Consumers at large have widely embraced wearable tech. Today, 36% of the adult population wears a smart watch or uses phone-based apps that can track their healthcare data.

36%

of the **adult population wears a smart watch or uses phone-based apps** that can track their healthcare data

Pleased to make use of this technology themselves, adults are also eager to engage their loved ones in this part of the digital revolution. According to NRC Health's data, **31% of parents report** having purchased wearable tech for their children.

31%

of parents report having **purchased wearable tech for their children**

These devices are technological marvels, taking pulse and heart rates, pedometric readings, and even measures of sleep quality and blood oxidation. Any of these metrics can be enormously informative for a patient's overall well-being.

It's no surprise, then, that parents want their children's providers to take stock of this information: **80% of parents** want their children's doctors to ask about wearable tech data. However, only **58% of them** ever report such conversations taking place.

80% of parents want to talk about their children's wearable tech data. But **only 58% of providers bring it up**.

Though this is a better performance than in the adult population (where only 49% of providers ask about wearable-tech data), there is still a notable gap between consumer preference and how providers behave.

SOCIAL MEDIA

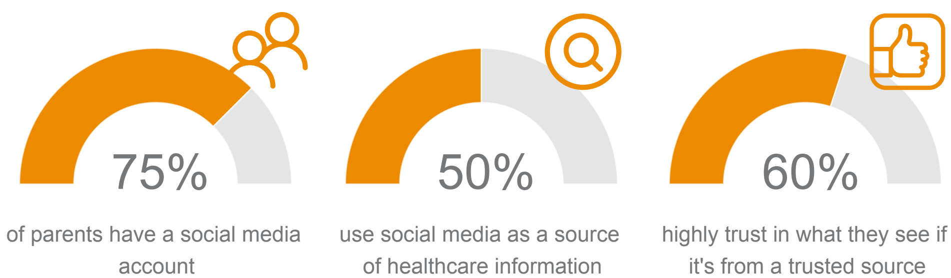
When it comes to staying informed about healthcare, more and more parents are shying away from analog resources. According to NRC Health's data, **39% of parents** do not find mailers, brochures, or pamphlets very helpful.

39%

of parents **do not find mailers, brochures, or pamphlets very helpful.**

Instead, their preference has swung dramatically toward the digital: **75% of parents** have a social media account, **50% use it** as a source of healthcare information, and **60%** invest a high level of trust in what they see—as long as it comes from healthcare-organization sites and profiles.

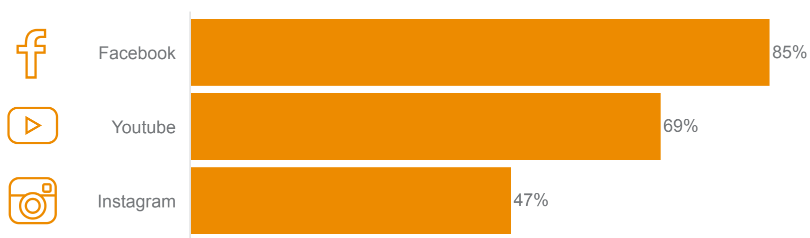
Parents prefer digital communication



Clearly, pediatric healthcare customers are ready to hear from their providers online. But where should organizations focus their efforts, and what information should they offer?

Consumers' channel preferences are unambiguous. With **85.2% of consumers turning to it**, Facebook is the undisputed leader among preferred sources of healthcare information. This is followed by **YouTube** at 69%, then **Instagram** at 46.7%.

Consumer channel preferences for healthcare information



However, organizations should be careful to note that consumers don't want organizations to push content to their feeds. Instead, **50.5% of pediatric consumers** say they want to organically discover healthcare content on provider account pages. They're looking for large, authoritative bodies of content on topics like nutrition, exercise, and available healthcare services.

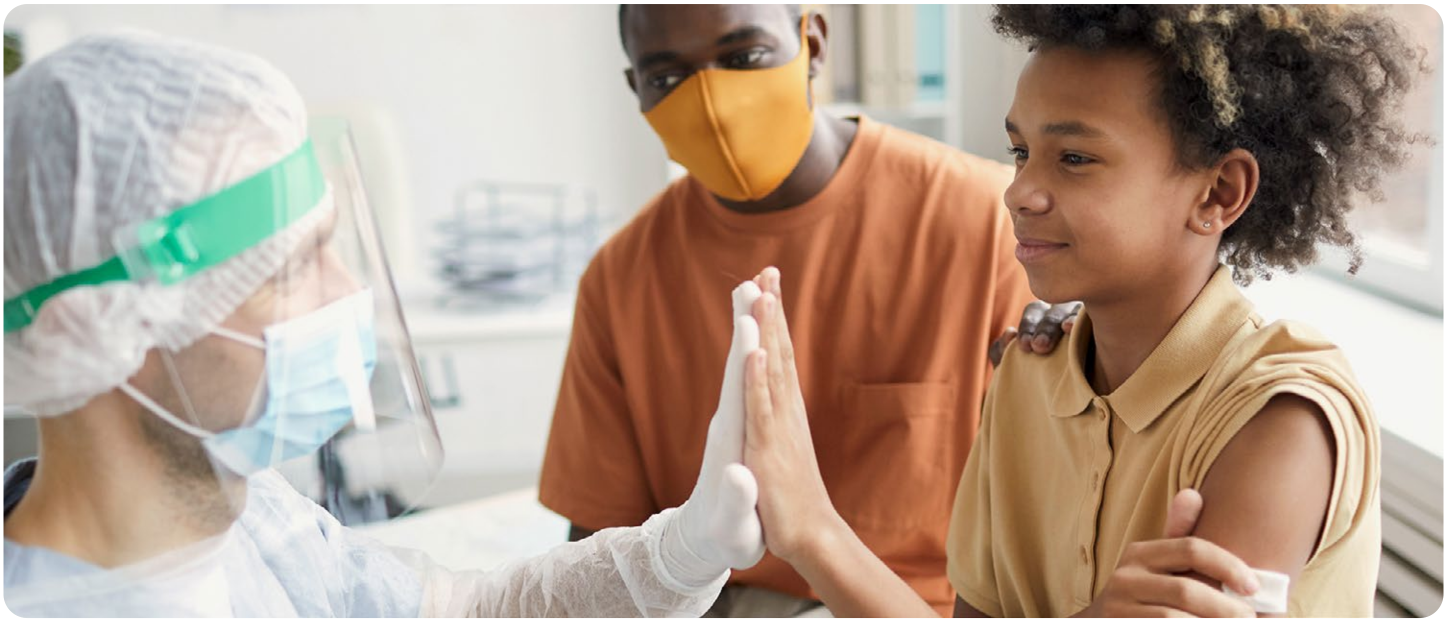
50.5%

of pediatric consumers don't want organizations to push content to their feeds. Instead, they **want to organically discover healthcare content on the provider's account pages**.

Much like their counterparts in the adult population, pediatric consumers want organizations to be *available*—not intrusive.

CONCLUSION:

A more empathic future



2020 was a singular year, one that neither consumers nor providers will soon forget. But while the advent of COVID-19 may have been profoundly disruptive, it has not fundamentally changed the demands of pediatric care.

Caring for pediatric patients has always been a special calling, in part because it's so complex. Organizations must carefully triangulate the needs of both child and parent, and give equal weight to the emotional needs of both. Success wholly depends on an organization's capacity for empathy—on its ability to truly understand who its patients are, and what they need to feel cared for.

In 2021 and beyond, the urgency of this demand for empathy will only increase. But as long as organization leaders commit themselves to real Human Understanding, they will discover the story behind every person.

NRC Health helps healthcare organizations better understand the people they care for and design experiences that inspire loyalty.

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