

Meeting Pediatric Consumer Demands

While pediatric patients were largely spared from COVID-19, they have not avoided the pandemic's impact. To better care for pediatric patients in a post-COVID world, boards of children's hospitals will need to pause and take stock. This will require considering how parental needs shifted in the months since COVID-19 began, how they are likely to evolve, and how children's hospitals can maintain meaningful connections with these customers.

This article provides highlights from NRC Health's pediatric *2021 Healthcare Consumer Trends Report*.¹ It looks at shifts in brand loyalty, the emergent role of telehealth, and innovations in digital communications channels. Healthcare boards can use this information to help formulate their strategies for the remainder of the year and beyond.

The Last Holdout of Brand Loyalty

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 percent of pediatric consumers express a preference for a specific healthcare brand. Compare this to the figure of 36 percent for adults in the general population.

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

¹ View the full report at <https://nrchealth.com/2021-pediatrics-trends-report>.

preference increased by only 4.3 percent, from 32.6 percent in 2018 to 36.9 percent in 2020.

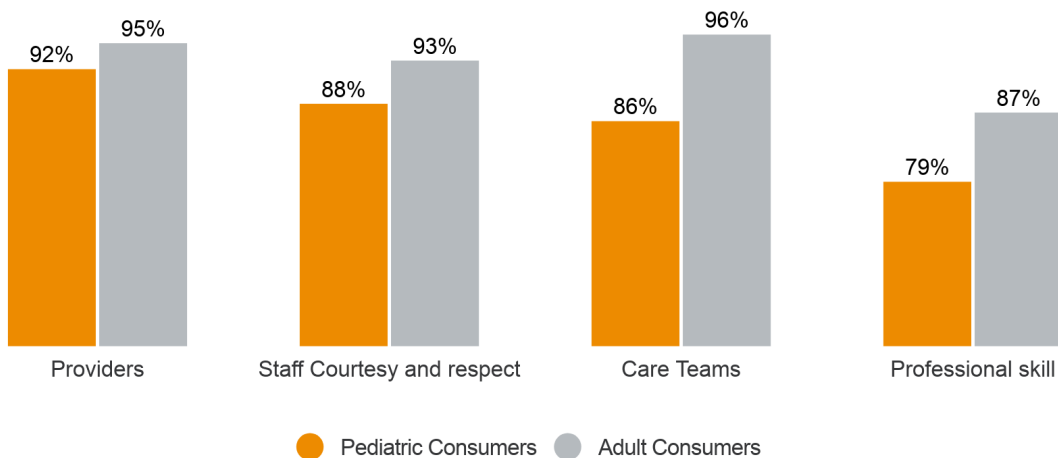
These figures indicate that, while pediatric organizations seem to be faring a little better than their adult-care counterparts, pediatric brand loyalty is not immune to the broader shifts in the industry.

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 **Exhibit 1.**)

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

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

Exhibit 1: Percentage of Positive Sentiments from Consumers



The Telehealth Takeover

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 percent of parents report using telehealth for a child's healthcare needs in 2020, compared to just 22.1 percent of adults using it for their own care. Among pediatric telehealth visits:

- 51 percent were for routine visits
- 32 percent for consulting about a specific ailment
- 31 percent for prescription refills and medication checkups

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




Here again, however, healthcare boards and senior leaders should take note of a pronounced gap in positive sentiment regarding telehealth encounters. In 2020,

→ Key Board Takeaways




- Ensure your organization is providing high-quality, compassionate care and that senior leadership and the board are continually monitoring consumer satisfaction and loyalty. This includes considering how parental needs may have shifted since COVID-19, and how the organization will meet these needs as they evolve.
- Carefully assess your telehealth and virtual care strategy and consumer experience. There is a high demand for telehealth and virtual care among the pediatric populations, and pediatric consumers generally have higher standards for their care.
- Ask senior leadership about other digital solutions being used to improve care. For example, whether or not wearable tech is utilized to better understand patients' well-being, or if the organization regularly provides content on social media related to nutrition, exercise, and available healthcare services.

Exhibit 2: What Pediatric Telehealth Consumers Did and Did Not Like

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

94 percent of adults who attended a telehealth visit had positive things to say. For pediatric consumers, that number was only 88 percent.

Again, it's reasonable to speculate that this discrepancy arises from pediatric consumers' higher standards for their care. **Exhibit 2** lends insight into what made the difference between a positive encounter and a negative one, based on consumer comments from over 120,000 pediatric telehealth encounters.

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 percent of parents plan to use e-visits for their children in the future, compared to just 27 percent of adults in the general population.

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.

Digital Engagement for the Pediatric Customer

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

According to NRC Health's data, 31 percent of parents report having purchased wearable tech for their children. These devices are technological marvels, taking pulse and heart rates, pedometer 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 percent of parents want their children's doctors to ask about wearable tech data. However, only 58 percent of them ever report such conversations taking place.

Though this is a better performance than in the adult population (where only 49 percent 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 percent of parents do not find mailers, brochures, or pamphlets very helpful.

→ Questions for the Board

- How have parental needs shifted at our organization since COVID-19 began, and how are they likely to evolve in the future?
- What can we do to better build loyalty and ensure that patients are receiving high-quality, compassionate care?
- What does telehealth utilization look like at our organization? What are we doing to improve the overall telehealth experience for consumers? Do we know how consumers currently feel about the virtual experience (e.g., their likes and dislikes)?
- What other digital solutions are being used to enhance the care experience and improve loyalty (e.g., wearable tech and social media)?

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

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 percent of consumers turning to it, Facebook is the undisputed leader among preferred sources of healthcare information. This is followed by YouTube at 69 percent, then Instagram at 46.7 percent.

However, organizations should be careful to note that consumers don't want organizations to push content to their feeds. Instead, 50.5 percent 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.

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

Conclusion

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.

Boards and senior leaders of children's hospitals should take time to consider the current and future needs of their consumers. They 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 truly cared for in a post-COVID world.

