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The Pandemic Parents

A Portrait of shifting Priorities in Raising Kids


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Session Roadmap

- Parenting during the pandemic
- Profile of the post-COVID parent
- Profile of the post-COVID child
- The parent-child bond in 2022
- Discussing the future

A photograph of a man and a young child sitting at a table in a kitchen. The man, on the right, has a beard and is wearing a light blue striped shirt. He is looking down at a laptop with a distressed expression, his hand resting on his forehead. The child, on the left, has curly hair and is wearing a dark shirt, looking up at the man with a concerned expression. The laptop is open on the table, and there are several books stacked to its left. The background shows a kitchen with wooden cabinets and a white countertop.

Parenting during the pandemic

A photograph of a living room with two young children sitting on a patterned rug in front of a red sofa. The room is lit by two lamps on side tables. A quote is overlaid on the image.

“Parenting is both an art and science of nurturing a child that comes very naturally to some.”

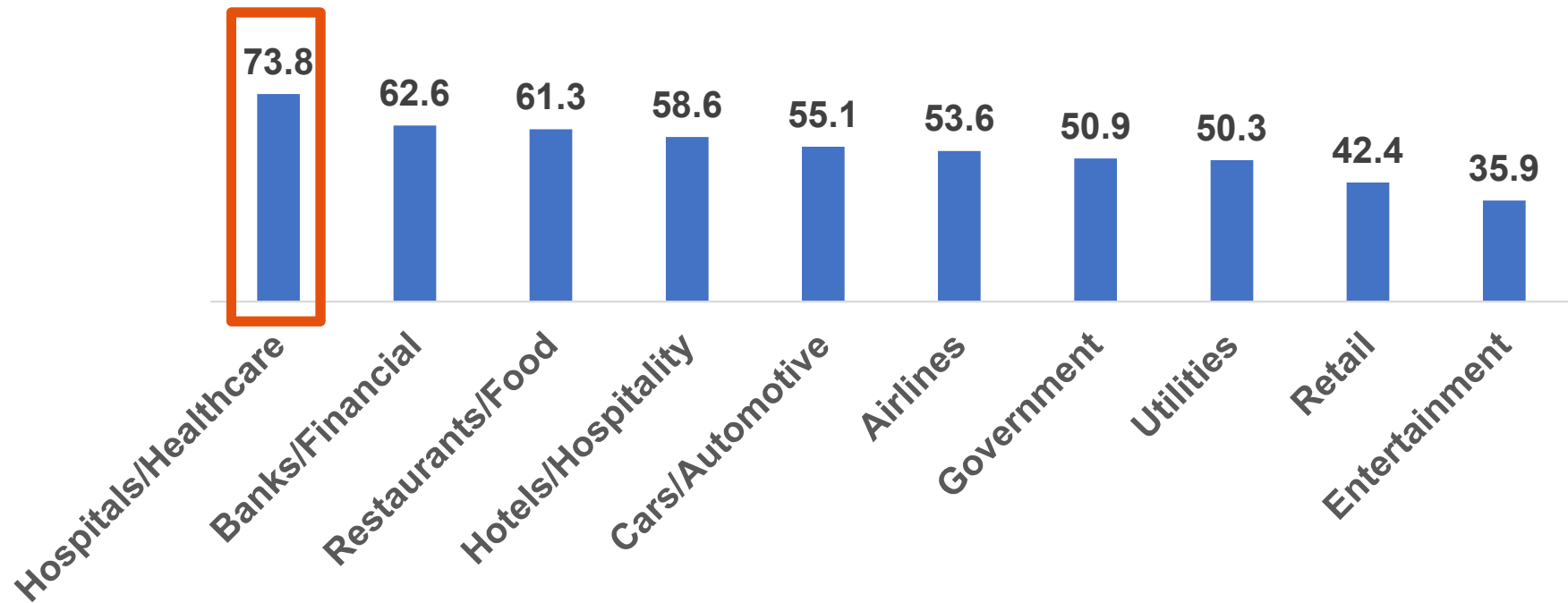
Karki, Dhonju, and Kunwar, 2020

Pandemic Parenting was an Unreal Stressor

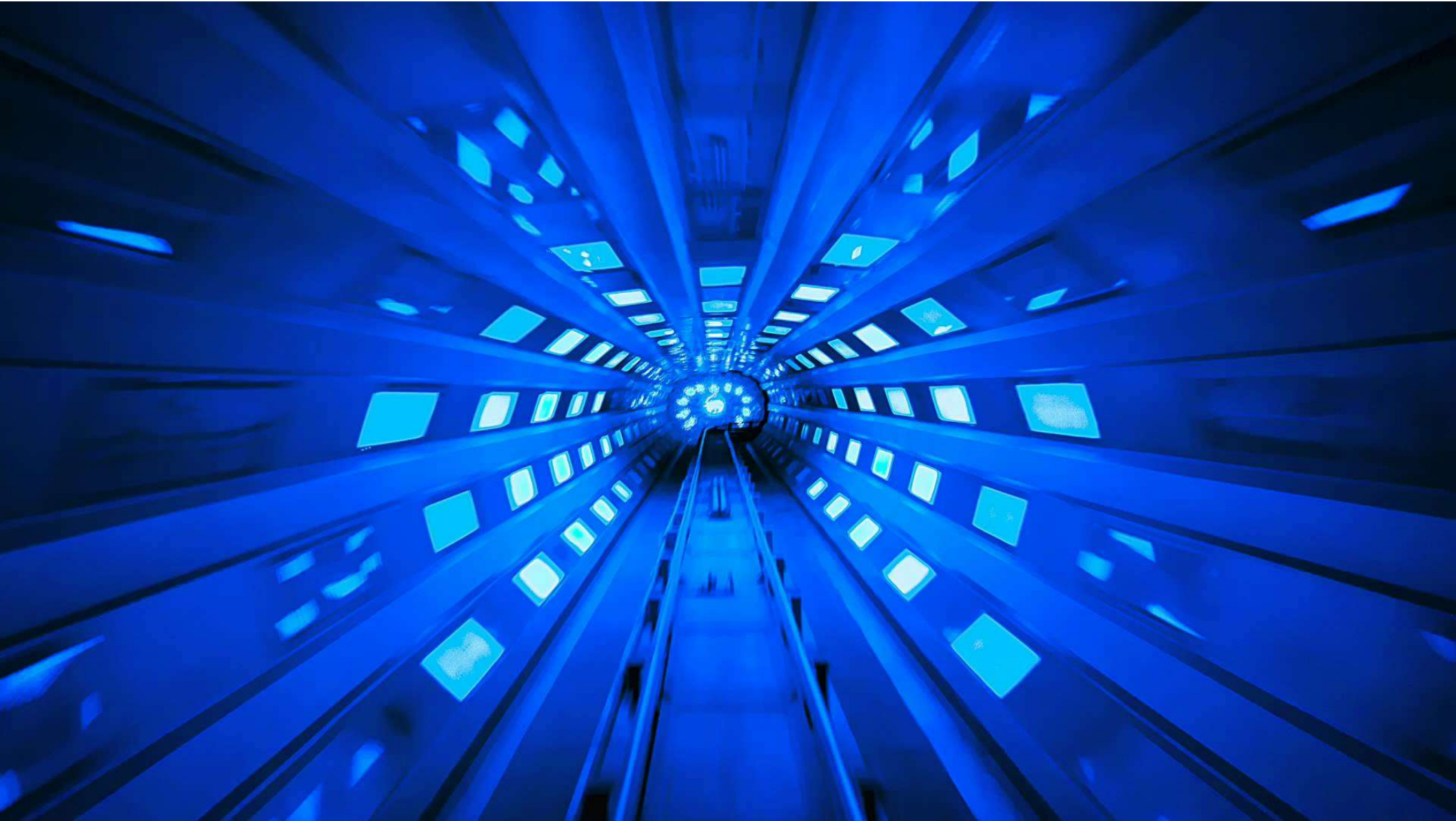
- Parents were stressed in new and previously unimaginable ways
 - Acting as parent and teacher
 - Dealing with financial strain of COVID
 - Needing to calm anxious children whilst being anxious
- COVID parenting won't end anytime soon

Healthcare Enjoys the Highest Bar of Expectation

Which of the following industries *should* meet or exceed your expectations as their customer?

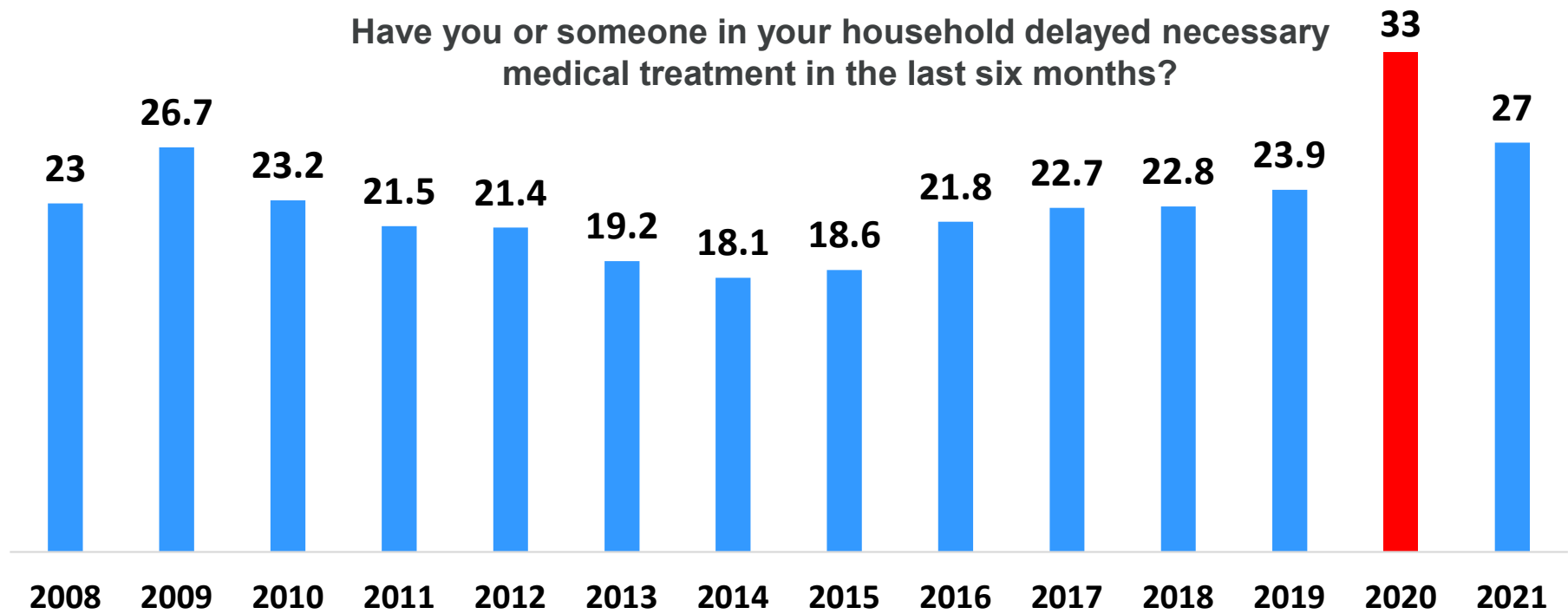








A Decade of Healthcare Deferment



Where is Deferment Among Parents?

- Parents deferring care for children has mercifully dropped in recent months:
 - 11.6% deferred care in Q4 2021
 - 12.3% deferred care in Q4 2020
- 43 percent cite COVID-19 concerns as a major impact on their decision to delay care

The Great Resume in [Pediatric] Care Experiences

- The rate at which parents are resuming services has risen by **135%** from 2020 to 2021
- Largest increases in volumes:
 - Urgent Care (170%)
 - Emergency (158%)
 - Inpatient (143%)
 - Outpatient (139%)
 - Medical Practice (128%)



Secondary Insurance Co.

Secondary Insurance Numbers

Past Medical History

Cardiac

- None
- Unknown
- Abdominal
- Hearing

The Dreaded Experience of Paying for Care

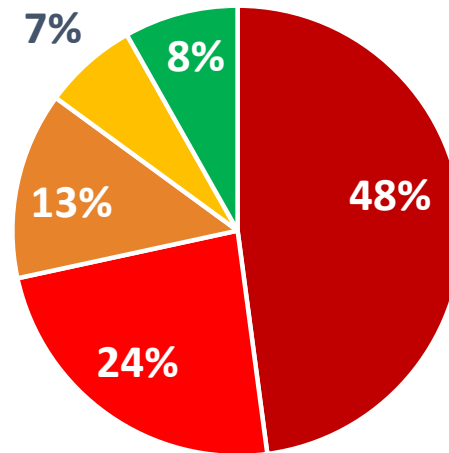
- Half of consumers feel a *significant* burden paying for care
- 87% of consumers incur some level of difficulty in trying to understand their healthcare bill(s)
- 65% feel its important to be able to fully understand their bill
- 51% feel its important to receive a single bill
- Many dissatisfied patients describe paying for their care as one of the worst parts of the experience





How Much Can Consumers Afford?

How much can you and/or your family comfortably afford in the event you need emergency medical care?



■ Less than \$500 ■ \$500-\$1,000 ■ \$1,000-\$2,000 ■ \$2,000-\$3,000 ■ More than \$3,000

TELEHEALTH UTILIZATION

In the past, have you used the following services? A virtual or e-visit with a doctor using a video service on my computer or phone

43.9%

have had a virtual healthcare experience in the past



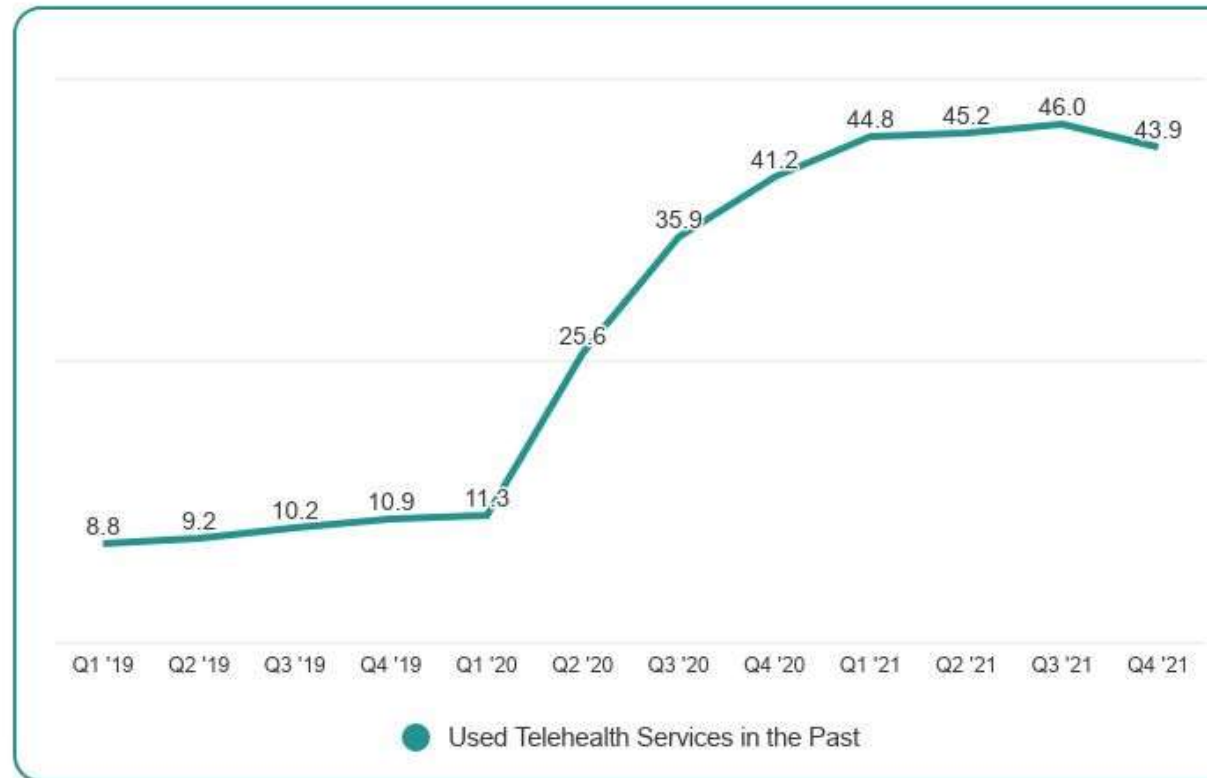
▲ 32.6% since Q1 2020
(11.3% → 43.9%)



▲ 14.3% quarterly increase at the start of the pandemic



National N Size -- Q4 2021
69,845



Consumers' excitement for telehealth has hovered around 55% throughout the pandemic, compared to the pre-pandemic average of 49.3% in Q1 2020.

TELEHEALTH EXCITEMENT

55%

49.3% Q1 2020







Digital Experiences that Simplify Receiving Care



Jacqui's son wakes at 3 a.m. with a fever. She comforts him, then quickly **schedules an appointment online** for him later that day before going back to sleep herself.



Every second of Bronson's day counts. So he **checks into his appointment remotely** to see if his doctor is on time; if she isn't, he knows he can squeeze in a few more emails.



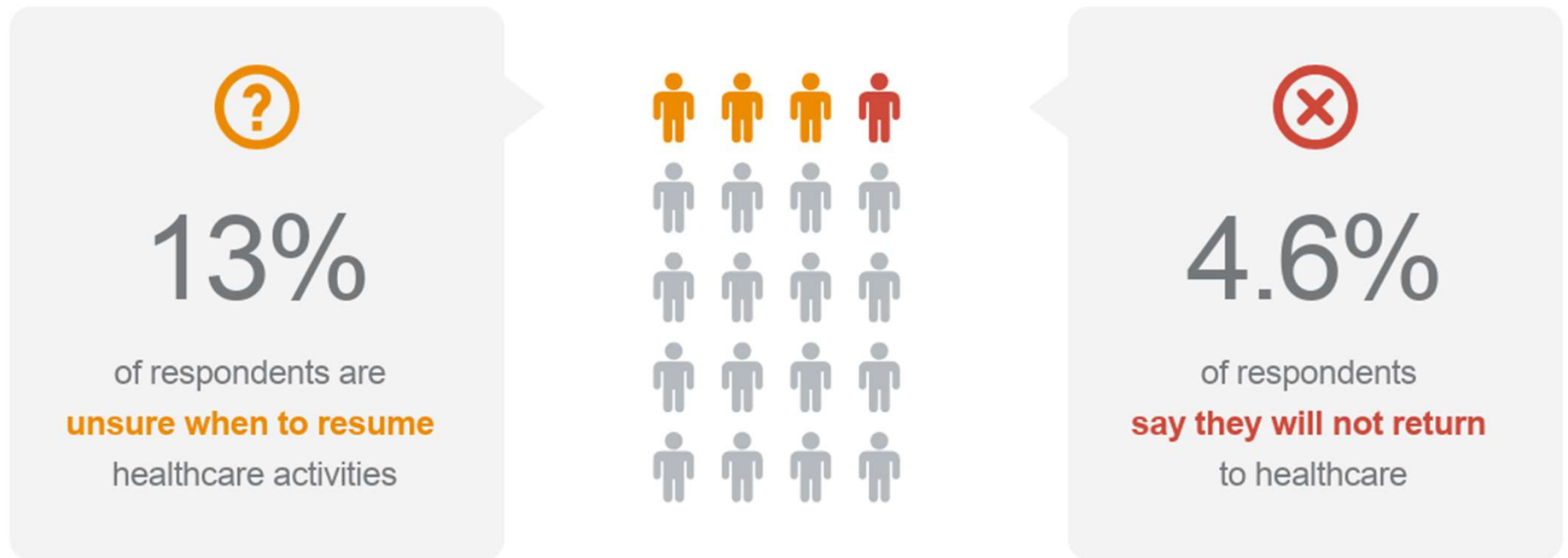
What's going on with Dad? This family already knows thanks to **status boards** that update them in real time while they wait.

Better Experiences, Improved Loyalty



Profile of the post-COVID parent

Some consumers are still hesitant to return to healthcare.



The Great Resume in [Pediatric] Care Experiences

- **13 percent** of parents unsure of when to resume healthcare activities
- 5.5% say they **will not** return to healthcare
- Opportunity exists to engage these ‘opted-out’ parents and encourage them to opt back in



With Children; Without Vaccination

- Vast majority of unvaccinated in this group
 - Only 1 in 4 unvaccinated are over 50 years old
- Concerns are similar to older Americans
 - Worry about potential side effects, rushed process, contents of the vaccine, etc.
 - Higher amount feel they are too ‘healthy’ to get vaccinated
 - These concerns aren’t changing much over time

With Children; Without Vaccination

- Parents with unvaccinated children in their household:
 - 35% want pediatric vaccination ‘asap’
 - 34% will wait or have some level of uncertainty
- Among the 18-44 year old age group specifically: parents are less likely to be vaccinated
 - 43% without children are fully vaccinated
 - 27% with children are fully vaccinated

A photograph of four children running joyfully across a grassy field during the golden hour of sunset. The children are in motion, with their hair and clothes slightly blurred. One child in the foreground is wearing a vibrant rainbow cape and sunglasses. The background is filled with trees, their leaves glowing with the warm light of the setting sun. The overall mood is one of happiness and carefree play.

Profile of the post-COVID child

Profile of the Post-COVID Child

- One issue arises in the near term as an area of utmost importance: mental health
- The pandemic didn't create mental health issues but it certainly exacerbated them
- Children's mental-health hospitalizations increased 163% from 2020 to 2021



1 in 3

consumers (30%) report that their **mental health has worsened** due to the COVID-19 pandemic.

The Alarming Rise in Suicide Attempts

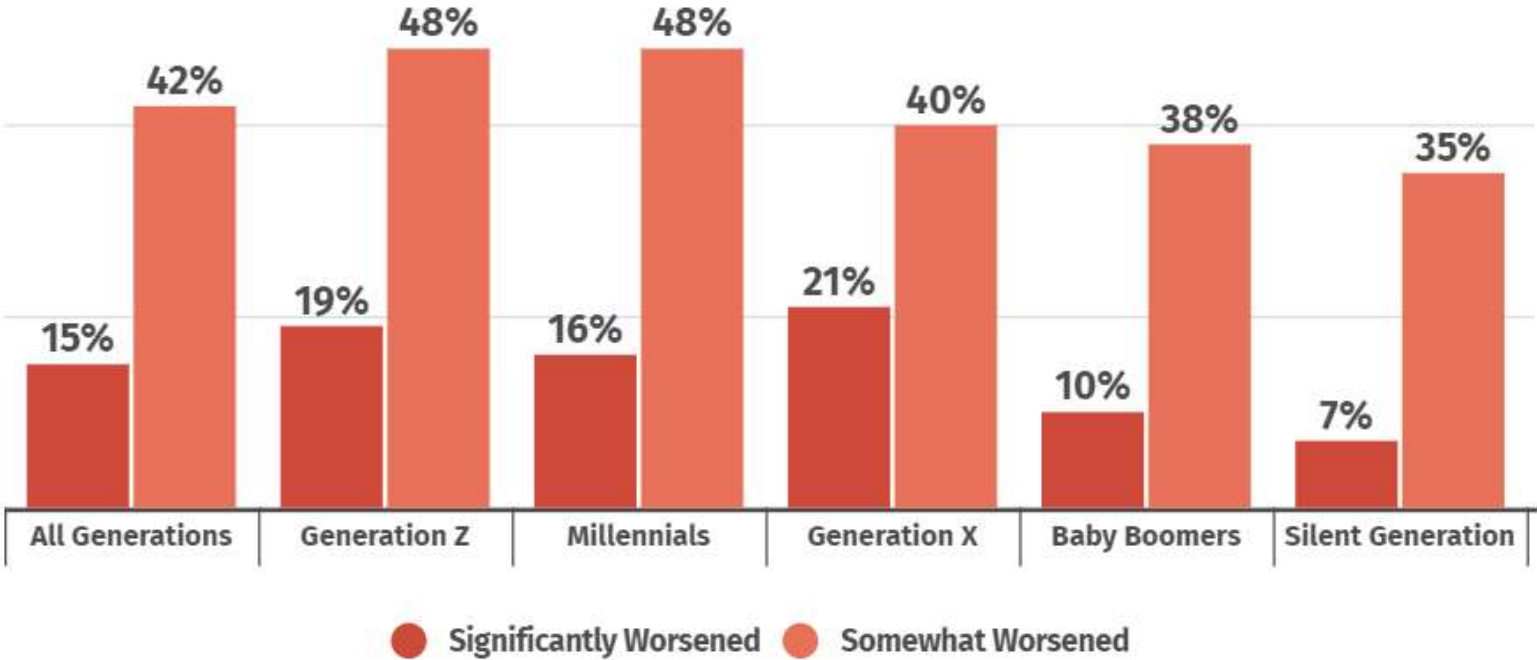
- NRC Health's Real Time feedback data found ED visits for suspected suicide attempts were 4% higher among adolescent boys and 51% higher among adolescent girls from 2019 to 2021
- Psychiatric visits among young people increased 31 percent during the pandemic
- Mental health issues are on the rise among children and adults

Future Issues to Stay With Us?

- Due to deferment of pediatric care, parents report a decrease child immunizations
 - 26% in Q1 2020 to 21% in Q4 2021
- Parents reported a slightly higher rate of ‘worsened’ mental health than non-parents
 - 32% of parents reported; 30% of non-parents

Mental health is a Crisis Uncontained by Age

How has your mental health, including feelings of anxiety or depression, changed due to the COVID-19 (coronavirus) crisis?





The parent + child bond in 2022

The Parent + Child Bond in 2022 (and Beyond)

- The parent + child bond was pressured in unimaginable ways during the pandemic
- The pandemic also created new ways to bond and stay together through difficulty
- The link between parent + child may be stronger now than pre-COVID



5.1%

increase in marketing recall
from the lowest point of
59.4% in 2020 to 64.5% in 2021.

Will We Be on the Minds of Parents in the Future?

- Parents will always be in search (consciously and sub-consciously) of great care for their children
- While marketing recall of healthcare brands increased from 59% to 65%...it remained stagnant for pediatric facilities (1.5% in both 2020 and 2021)
- Websites are a bright spot: consumers visiting a pediatric hospital website rose from 36% to 41%



Strategic Framework for Brand Positioning

CURRENT STATE	<ul style="list-style-type: none">• What is our current brand according to consumers?• What is the current position of our brand?
TARGET	<ul style="list-style-type: none">• What are their needs?• How have their priorities shifted?
FRAME OF REFERENCE	<ul style="list-style-type: none">• What is the competitive set?• What does the target audience think of them?
POINT OF DIFFERENCE	<ul style="list-style-type: none">• Why should they choose you over competitors?<ul style="list-style-type: none">– Benefits provided, beyond functional, to create uniqueness– Identity of the brand: what the brand stands for; reinforcing characteristics
REASONS TO BELIEVE	<ul style="list-style-type: none">• How should the brand deliver on the value proposition positioning and deliver the promised benefits?<ul style="list-style-type: none">– Supporting “facts”, big or small, that provide a basis for the customer to believe that the brand can deliver on the positioning; builds long-lasting relationship

A woman with dark, wavy hair, wearing a blue blazer, is smiling and looking out a window. The background is a blurred view of a cityscape with buildings and a bright sky. The text is overlaid on the image in a white, sans-serif font.

Powerful new metrics to measure
transformation in ~~standards~~ care.

Human Understanding Metric

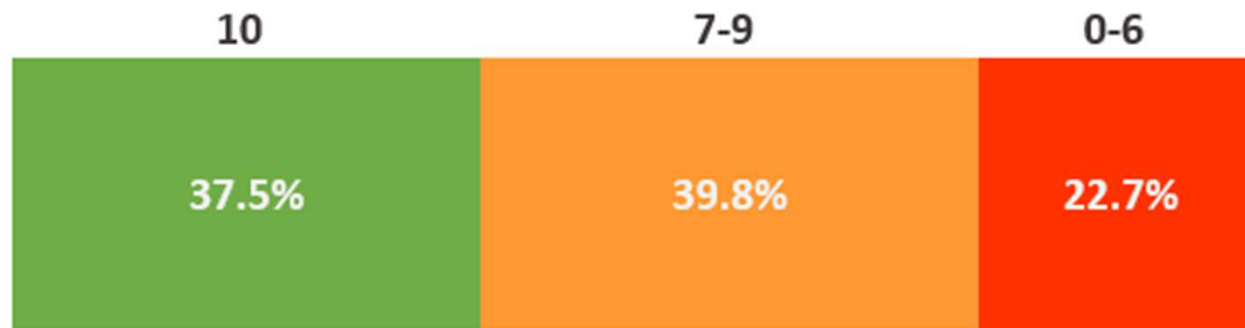
Disciplined process of scale development
generated a single item measure:

→ Did everyone treat you as a unique person?

0 = no, no one did ... 10 = yes, everyone did

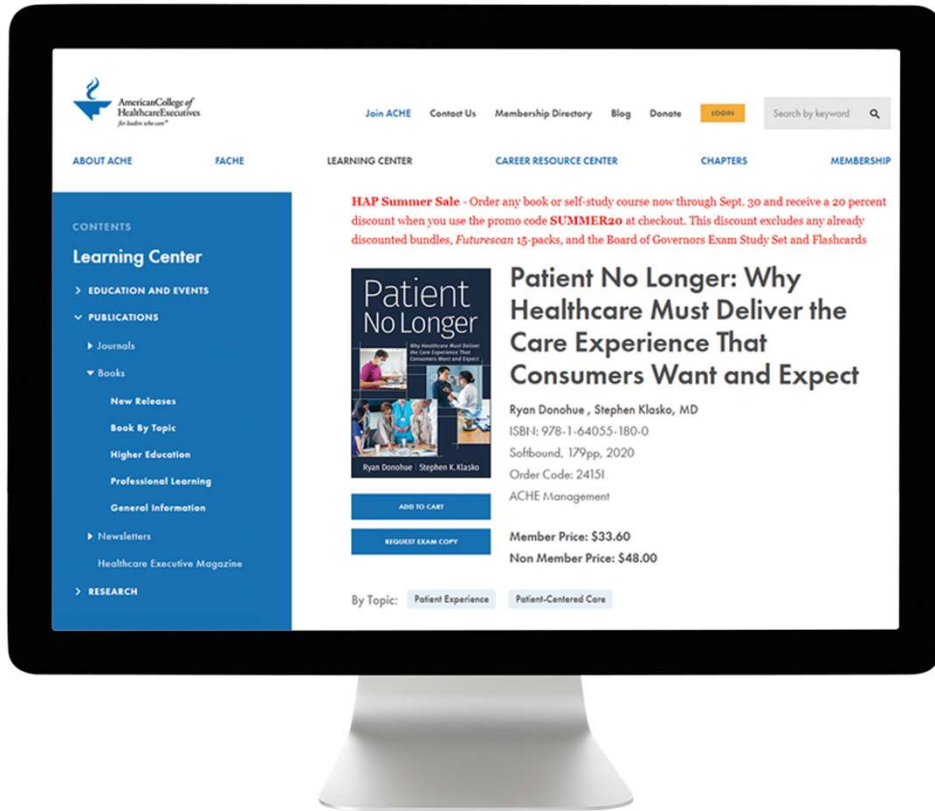
Did everyone treat you as a unique person?

National Market – December 2021 (n = 15,133)



10 = yes, everyone did ... 0 = no, no one did





**Patient No Longer
Podcast**



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Discussing the future