



REPORT

NRC Health 2022 Pediatric Consumer Trends Report

A note from NRC Health Chief Growth Officer Helen Hrdy

PARTNERS IN PEDIATRICS,

We've often heard from you that serving pediatric patients is rewarding, is inspiring, and gives hope for a new generation. In a post-COVID world, this sentiment has more at stake than ever before. As 2022 begins, we have gathered insights about how parental needs have shifted and how healthcare trends have evolved, so you can maintain these meaningful relationships crucial to pediatric care.

As leaders in pediatric healthcare, you will find insights and data in the NRC Health 2022 Pediatric Consumer Trends Report, organized around the major trends impacting your work:

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These topics, gleaned from our country's premier pediatric healthcare-consumer database, are explored in depth in our report. Culled from millions of data points captured from hundreds of thousands of consumer households, these insights will provide you with unique knowledge of what this special population wants and needs from providers.

As you lead positive transformation for your organization in 2022 and beyond, we hope our report will enrich your work and the work of your peers, guiding you in deeper Human Understanding™ to serve our cherished pediatric patients and families.

Warmly,



Helen Hrdy,
Chief Growth Officer, NRC Health

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PART ONE:

Parents are delaying healthcare less and are returning to healthcare in record numbers.

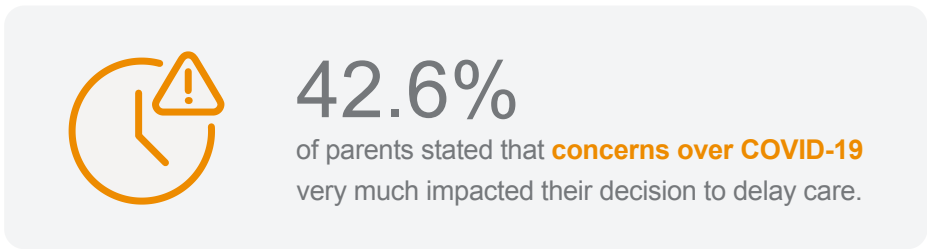


"In a time of being nervous, not knowing what to expect walking in, they all did great informing me while keeping my daughter completely comfortable and happy. I couldn't be more thankful to have the team I had to make her come out of it saying she had fun and she'd come back. You guys did more than amazing!"

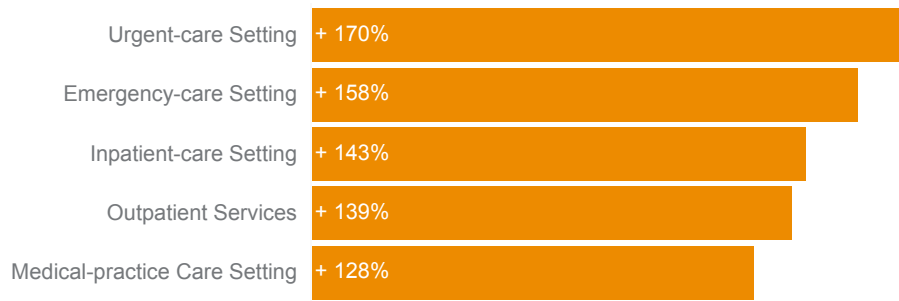
—Delaware parent

One of the most significant disruptions in healthcare delivery in modern history has come from patients deferring care during the pandemic. The promising news is, NRC Health data shows that healthcare deferral in pediatrics is decreasing, and parents are starting to resume services for their children. However, pediatric systems should be mindful that some pediatric patients who re-emerge could be sicker and costlier in 2022.

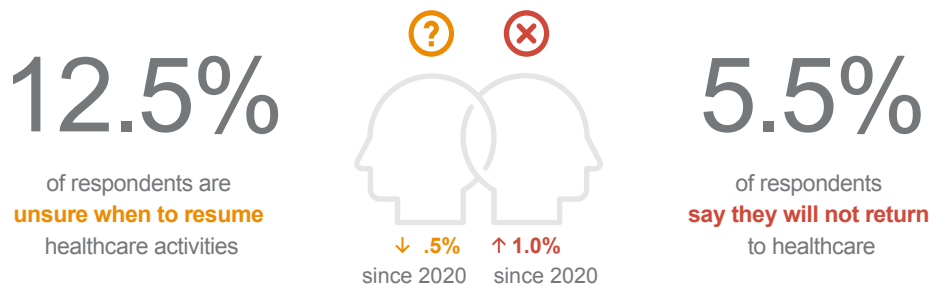
As of Q4 2021, 11.6% of parents stated that they had delayed pediatric care for a child in the household, compared to 12.3% in Q4 2020. Additionally, **42.6% of parents stated that concerns over COVID-19 very much impacted their decision to delay care.**



Fortunately, the rate at which parents are **resuming services has risen by 135% from 2020 to 2021 across all major service lines.** The largest increases in volume among major service lines have come from:



A small but often overlooked percentage of parents don't plan to return to healthcare or are unsure when they'll do so. As of Q4 2021, **12.5% of parents say they are unsure when to resume healthcare activities,** and 5.5% say they will not return to healthcare.



As pediatric healthcare organizations continue to manage the flux, the CDC urges **pediatric providers to work with families to keep children up to date with all recommended vaccinations** as much as possible. They should also identify children who have missed well-child visits, recommend vaccinations, and contact them to schedule in-person appointments, prioritizing infants, children younger than 24 months, and school-aged children. Developmental surveillance and early childhood screenings, including developmental-disability and autism screening, should continue, along with referrals for early intervention services if concerns are identified.¹



CDC urges pediatric providers to work with families **to keep children up to date with all recommended vaccinations** as much as possible.

“We have been away for almost two years because of COVID-19. When we came today, we felt such joy to be back in this loving and caring environment where all the staff—from the valet to the people checking us at the door to the medical staff—all of them are dedicated to a mission of serving. We are so glad to be back and so thankful nothing has changed. We are grateful for this amazing little island of respite!”

—Colorado parent

PART TWO:

There is strong and consistent excitement around telehealth, but pediatric healthcare systems should strategically determine which services work best with the technology.



"I love having this option for appointment! My child did not have to miss school to be seen in the office because of the telehealth option."

—California parent

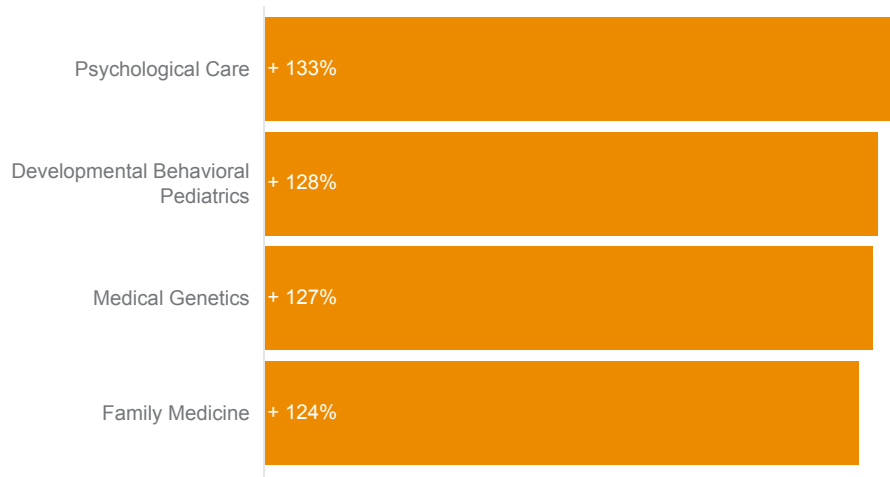
Telehealth excitement among parents has hovered around **63% throughout the pandemic**, compared to the pre-pandemic average of 57.8% in Q1 2020. Additionally, parents are more excited about telehealth (63.1%) than consumers without any children in the household (52.3%).

TELEHEALTH EXCITEMENT

63.1%

57.8% Parents pre-pandemic | 52.3% Non-parents

Telehealth's inherent **ease of use, amount of time spent with providers, courtesy, respect received, and attentiveness have made the technology a winner**—but only for specific groups of providers. Telehealth usage has grown within disciplines such as:



Outside of these areas, telehealth usage in pediatrics has decreased in almost every area, so it's critical for pediatric healthcare systems to use telehealth strategically. A parent from California explains that they're tired of telehealth serving as the default: "I don't feel like the service for my son is as good as it would be in person. For some things it's fine, but for others, I feel like it's gone too far and hasn't come back to what is best for the patient yet."

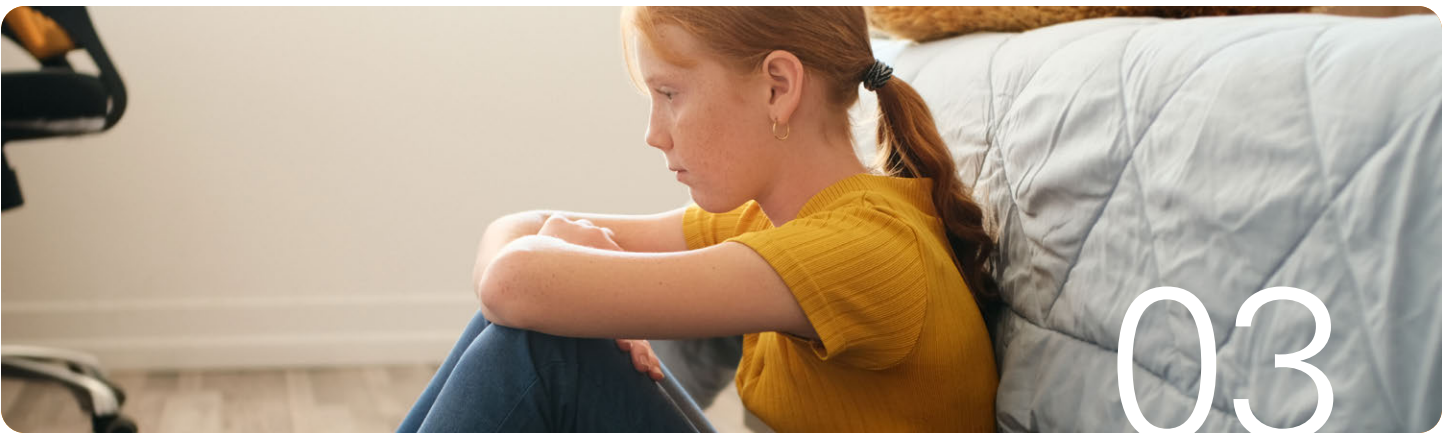
Given that telehealth usage has more than doubled since 2020, pediatric healthcare systems should **cultivate an effective and meaningful telehealth practice and consider digital health innovations.** Pediatric healthcare systems should also **prioritize provider time, attentiveness, and financial transparency** in their telehealth offerings.

"We love telehealth, so it isn't a long drive, and we still feel like we get excellent care."

— Kansas parent

PART THREE:

The pandemic's toll on mental health has been staggering: children's mental-health hospitalizations alone have increased 163% from 2020 to 2021. Pediatric healthcare systems need to act now to offer mental-health resources and preventative mental-health resources to their communities.



"It would be great if they could create an option for mothers of multiple young children. I fear that the current policy is causing children and mothers to lack healthcare access because they aren't able to bring the whole family. Children won't get their well-being checks if a mother can't find babysitting. They are overlooking the fact that the current policy is hurting women and children's access to healthcare."

—Indiana parent

Citing mounting evidence of ongoing harm, U.S. Surgeon General Vivek H. Murthy issued a public-health advisory in December 2021 on the mental-health challenges confronting youth, **a rare warning and a call to action to address what he called an emerging crisis exacerbated by pandemic hardships.**

Before the pandemic, children from all backgrounds—especially immigrants, students with disabilities, and students of color from low-income families—faced serious mental-health challenges. At the same time, pandemic-related safety measures reduced in-person interactions among children, friends, social support, and professionals such as teachers, school counselors, pediatricians, and child welfare workers.²

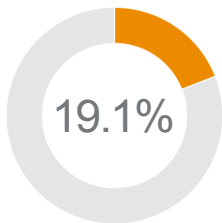
NRC Health’s robust patient feedback data finds that **mental-health hospitalizations of children have increased 163%** from 2020 to 2021. In early 2021, **emergency-department visits in the United States for suspected suicide attempts were 51% higher for adolescent girls and 4% higher for adolescent boys** compared to the same time in early 2019.³



163% ↑

increase in **mental-health hospitalizations of children** from 2020 to 2021

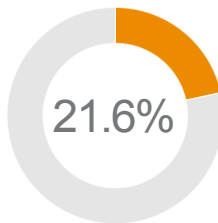
While parents have noticed an **increase in advertising relating to preventative care and wellness**—from 19.1% in Q1 2020 to 21.6% in Q4 2021—they **have also experienced a delay in several types of care**, and parents are now facing barriers to resuming care due to staffing/scheduling and COVID policies.



Q1 2020



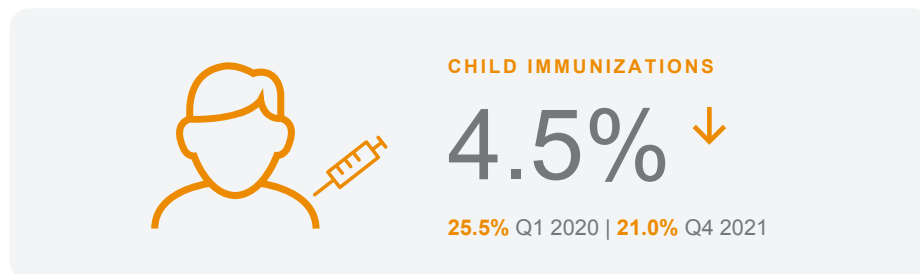
increase in advertising relating to preventative care and wellness



Q4 2021

Because pediatric care was delayed, new data shows that **parents report a decrease in child immunizations, an indicator of preventative care**, from 25.5% in Q1 2020 to 21.0% in Q4 2021. Further, parents report slightly higher rates of their own worsened mental health (32.4%) than consumers without children in the household (29.9%) in Q4 2021.

Parents report a decrease in child immunizations, an indicator of preventative care



Pediatric health systems should maximize communication in offering mental-health resources and preventative mental-health services to help decrease pediatric hospitalizations. The National Institute of Mental Health suggests sharing prevention hotlines, promoting different providers, and offering literature on community services, online therapists, Medicare, and options for those without insurance. Promoting online apps and phone resources also helps.⁴ In addition to highlighting their resources, pediatric health systems can highlight the National Alliance on Mental Health’s free 24/7 helpline to connect people to support by texting NAMI to 741741.

“I appreciate the way in which the doctor expressed his concern for my child’s well-being, not only physical but mental. He asked how my child was coping as a result of the pandemic. He referred us to psychology within the hospital.”

—Pennsylvania parent

PART FOUR:

An increase in consumers naming a healthcare system shows that healthcare recall is rising in general, but pediatric facilities have not stood out.



"This was our first visit to a clinic since the start of COVID, and the staff was very professional and efficient. I checked out the video on the website and felt it gave a great explanation as to why children should continue to get care, and it provided reassurance."

—Minnesota parent

For health organizations that adults visit, **marketing recall has increased 4.8% from its lowest point of 59.4% in 2020 to 66.3% in 2021.** However, for pediatric facilities specifically, **that percentage has remained stagnant (at 1.5%) in both 2020 and 2021.**

Advertising for pediatric services among parents has only marginally improved, with 9.1% of parents recalling seeing advertising for pediatric services in 2021, compared to 8.1% in 2020.



9.1%

of **parents recall seeing advertising for pediatric services** in 2021, compared to 8.1% in 2020

Fortunately, **consumers visiting a pediatric-hospital website have increased 5.3% from 2020 to 2021. An all-time high of 41.4% consumers report having visited a pediatric-hospital website as of Q4 2021**, so the commitment within pediatric marketing-communications technology is important.

Parents report a 6.9% increase in hospital website visits from 28.5% in 2020 to 35.4% in 2021, which provided useful health information.



41.4%

of consumers report having **visited a pediatric-hospital** website

PEDIATRIC-HOSPITAL
WEBSITE VISITS

5.3% ↑

41.4% 2021 | 36.1% 2020

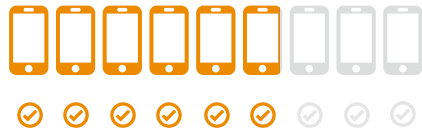
HOSPITAL
WEBSITE VISITS

6.9% ↑

35.4% 2021 | 28.5% 2020

Pediatric providers can ensure that their marketing has a digital-first, mobile-ready strategy. Nearly **two-thirds (65.8%) of parents say they will use a handheld mobile device to access information in the next 12 months. Social media (at 20.1%, up from 13.3% in 2020) is now the second-most recalled ad platform** behind television (24.8%) among consumers with children in the household.

Two-thirds (65.8%) of parents say they will use a **handheld mobile device to access information** in the next 12 months.



AD RECALL FROM
SOCIAL MEDIA

20.1%

Among consumers with
children in the household

The lack of pediatric recall for consumers creates an opportunity to elevate brand campaigns in regional and national markets. Pediatric organizations should build their brands using an omnichannel approach to engage patients and personalization techniques to promote services, provide resources, and advertise personalized care to target active audiences.

“You have assembled a powerhouse team, and I am so glad I came across your website. I will definitely recommend all of you in the future.”

—Nebraska parent



PART FIVE:

Pediatric health systems must demonstrate an understanding of patients' unique needs and preferences to show Human Understanding in action, which builds trust.



"The RN took incredible care of us. She talked with me. She talked to me more than just as a patient's mother. She talked to me as a human being."

—Colorado customer

Consumers' likelihood of recommending pediatric hospitals and health systems has increased while parents' likelihood of recommending hospitals has decreased, which indicates that the care experience is not meeting expectations. Pediatric hospitals and health systems must meet people where they are to increase this critical metric.

Consumers' likelihood of recommending pediatric hospitals and health systems (**Net Promoter Score or NPS**) has increased slightly (by 0.3 points) from 45.8 to 46.1 between 2020 and 2021. Although slight, consumer NPS for pediatric hospitals has not shown an upward trend in several years. Conversely, **the pediatric patient experience peaked during the onset of the pandemic—with an NPS at 69** in April 2020 for hospital inpatients and emergency departments—but has been declining since, resulting in an NPS of 53 in December 2021.

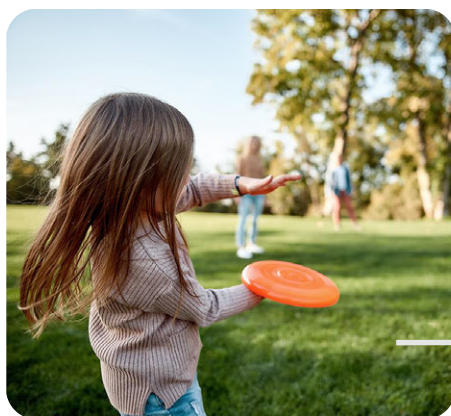
Decline in pediatric patient experience (Net Promoter Score or NPS) for hospital inpatients and emergency departments



The key to enhancing a patient’s care journey is **understanding preferences in advance**, which can be achieved through communication assessments. Pediatric healthcare systems should deliver a person-centered, equity-focused experience as a standard measure across care settings and treat each patient as unique while personalizing their experience.

During the past 15 years, covering the existence of the CAHPS program, NRC Health has seen the overall percentage of patients who recommend an organization barely increase—yet the industry is still spending billions of dollars a year to drive improvement against such measures.

What needs to happen is a new understanding that 99% of a patient’s life happens beyond the pediatric hospital care setting. When pediatric healthcare organizations begin to understand each person’s expectations in advance of their interaction or episode of care, they can personalize those interactions at the right moments and exceed patients’ expectations.



99%
of a **patient’s life happens beyond the pediatric hospital** care setting

In NRC Health’s [2022 Healthcare Consumer Trends Report](#), we report that the number of consumers with no preference has plateaued, and pediatric services have shown a similar trend. However, pediatric hospitals and health systems have a vested interest in ensuring that their brand is preferred.

Consumers who had no preference among pediatric services have followed similar trends as **those with no preference among adult services, with 35.7% of consumers indicating no preference for pediatric services in 2021, compared to 36.9% in 2020.**

In 2021, the percentage of consumers indicating **“no preference”** for a pediatric health brand plateaued.



**NO HEALTHCARE
BRAND PREFERENCE**

35.7%

-1.2% change | 36.9% 2020

Further, **consumers are reporting no change in preference for hospitals and health systems in terms of personalized care**, indicating that hospitals and health systems are not going out of their way to meet patients where they are.

In 2021, the percentage of parents indicating “no preference” among hospitals that provide personalized care declined only 2.0%, from 26.5% in 2020 to 24.5% in 2021.

Ultimately, pediatric healthcare organizations must strive for seamless connectivity between service recovery and missed patient expectations, driving caregiver recognition and positive comments on social media to enhance reputation. Now is the time for pediatric organizations to use meaningful advertising and aim their messaging at patients in a personalized way that adds value to their life.

“I couldn't ask for a better team of physicians and nurses and staff. We're more than just a patient. We're family, and that tells me a lot about this hospital, when you make the child and the parents comfortable and meet their needs. Whatever they need, you guys are right there.”

—Arkansas parent

CONCLUSION:



The global pandemic of COVID-19 and its variants have quickly taught all healthcare organizations that transformational change is necessary to meet demand and move the industry forward. And while many pediatric hospitals and health systems have shown they can be flexible despite catastrophic losses, the pandemic has shined a light on how necessary consumer-driven improvements and a better patient experience are for continued survival and growth.

The pediatric-healthcare industry can use NRC Health's six Human Understanding imperatives to strengthen their commitment to consumers:

- 01 Drive growth** by using patient ratings to amplify why you are the best choice for care
- 02 Personalize care** by understanding what matters most to each patient
- 03 Build trust** by checking in to identify and address questions, readiness, and safety risks
- 04 Exceed expectations** by collecting and reporting feedback to spark action
- 05 Drive loyalty and equity** by treating every patient as a unique person
- 06 Transform services** by surfacing needs voiced by the communities you serve

When pediatric organizations lead with empathy and Human Understanding and engage patients to co-design the healthcare process, they will be more than ready to meet any future challenges.

SOURCES

- 1 Centers for Disease Control and Prevention. "Information for Pediatric Healthcare Providers." (Updated December 30, 2020.) Accessed at <https://bit.ly/3rZkxHU>.
- 2 Blume H, Gomez M. "Surgeon General Warns of Emerging Youth Mental Health Crisis in Rare Public Advisory." Los Angeles Times. (December 7, 2021.) Accessed at <https://lat.ms/3rasjje>.
- 3 U.S. Department of Health & Human Services. "Protecting Youth Mental Health: The U.S. Surgeon General's Advisory 2021." (2021.) Accessed at <https://bit.ly/3KT1esA>.
- 4 Leonard J. "What Mental Health Resources Are Available?" Medical News Today. (September 28, 2020.) Accessed at <https://bit.ly/3oalrPP>.

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

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