



# 2025 National Consumer Insights Study (NCIS)

Peds Edition

Spring 2025



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Background, Methodology, and Demographic Profile

# INTRODUCTION

Klein & Partners has conducted an annual national online survey among consumers across a wide variety of healthcare topics for more than 12 years. **For the first time, this edition focuses on parents and how they make healthcare decisions for their children.**

Feel free to use any of these charts and share with your colleagues. We just ask that you acknowledge **Klein & Partners: 2025 NCIS** as the source of the information.

Many of these topics have additional data available for further analysis or discussion. If you are interested in learning more, please contact us. We'd be happy to present this information or do a deeper dive on any 'chapter' of the research with you and your team.

And I would like to personally thank three colleagues who shared their time and talents from assisting me in designing this survey to participating in our webinar with **Strategic Health Care Marketing**:

- **Deb Pappas:** Vice President, Chief Marketing & Communications Officer at Connecticut Children's
- **Leona Wong:** Director of Brand Strategy at Stanford Medicine Children's Health
- **Bob Davidson:** Vice President, Marketing & Communications at Children's Nebraska



Online Survey  
(device agnostic)



Fielded:  
March 25 – April 6, 2025



n= 1,000  
+/-2.6% at the 90% CL



National sample of parents  
responsible for at least one child  
18 years of age and younger.

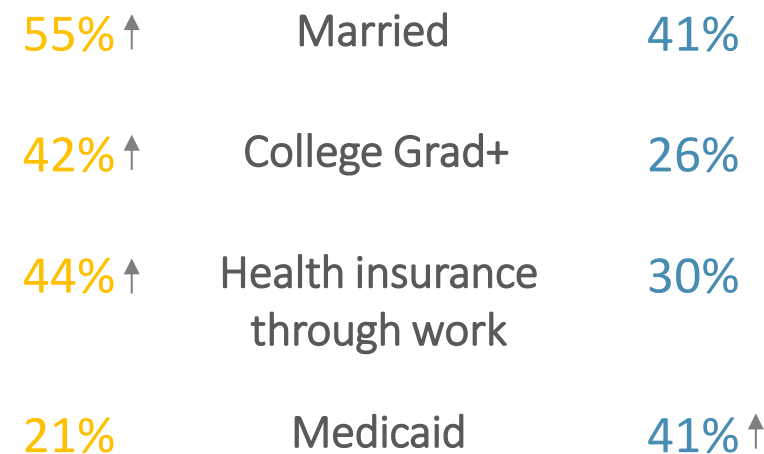
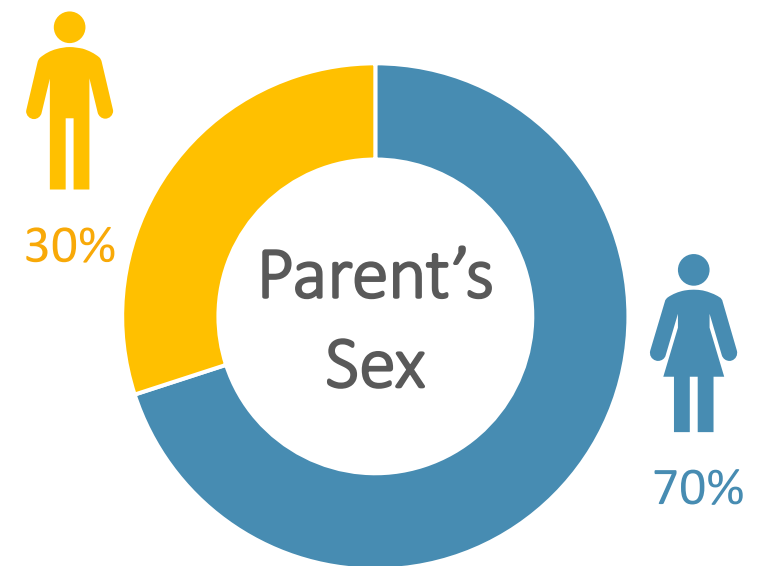


Note: Arrows (↑↓) and letters (e.g., A, B, C)  
indicate a statistically significant difference  
between those two data points.

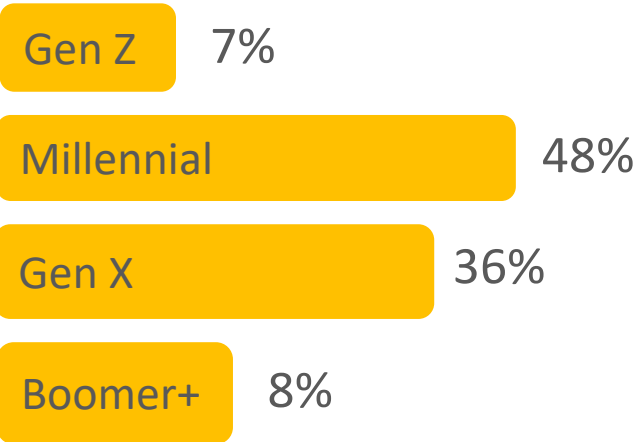
Survey questions are listed in the footnote  
for each chart.

	Total	Northeast	Midwest	South	West
Total	1,000	172	221	377	230
+/- at 90% CL	2.6%	6.3%	5.5%	4.2%	5.4%

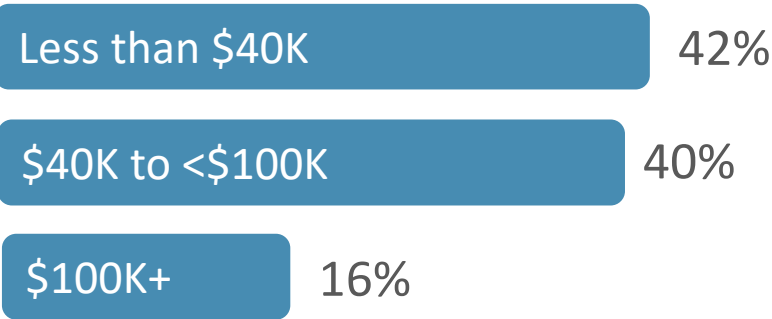
Demographic profile



Age [Average age = 44]

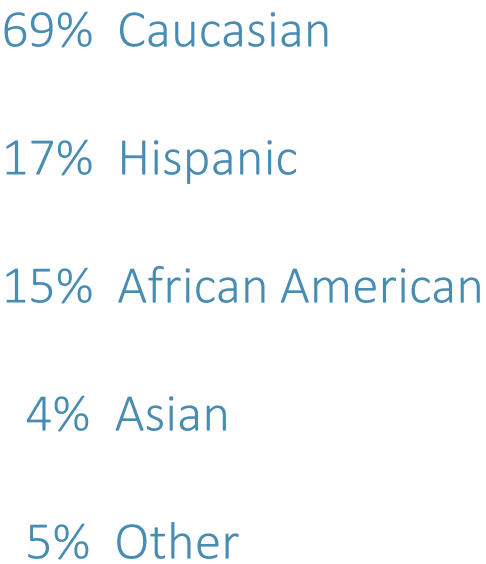


Income [Median income = \$43,313]



Ethnicity/ Race

(Multi-response)



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What did we learn?

# SUMMARY OF FINDINGS



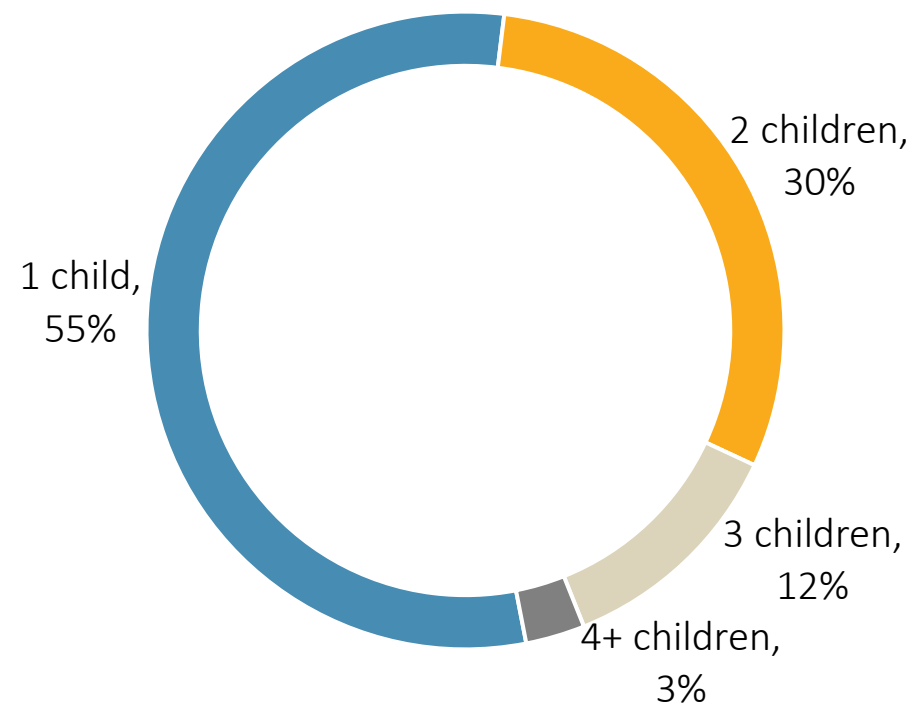
*“The battle for market share growth will happen at the top of the sales funnel through routine care across physician, outpatient, and urgent care settings.”*

*--Rob Klein*

## CHILDREN AND CHILDREN'S HEALTH SEGMENTS

Most parents report having ‘healthy’ children; the battle for market share will happen at the top of the sales funnel through routine care across physician, outpatient, and urgent care settings

Number of Children



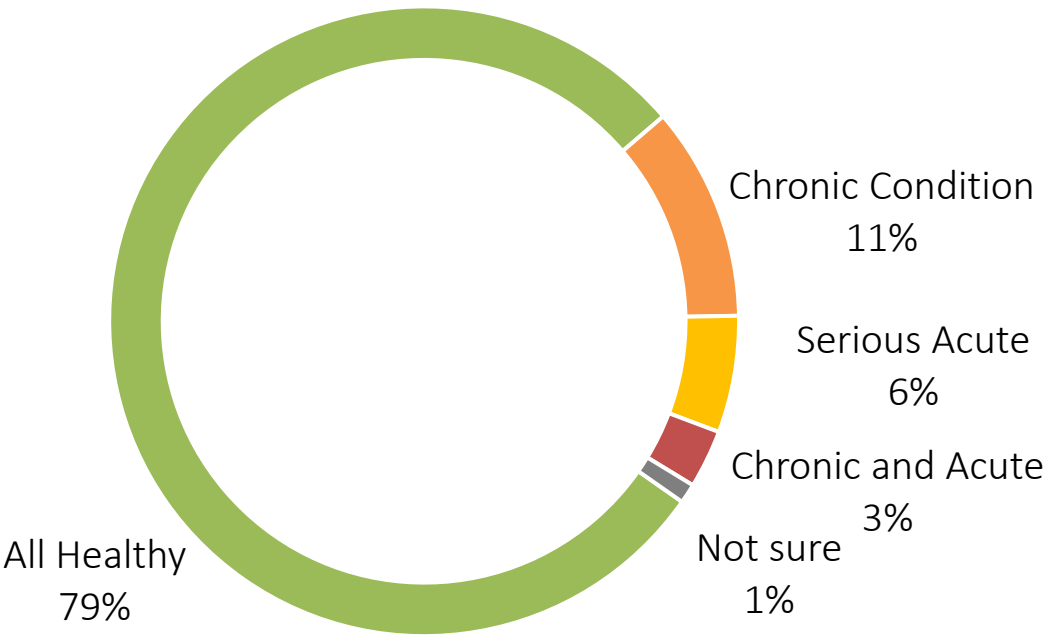
Average = 1.7 children

Age of Children

< than 1 yr. old	3%
1-4 yrs. old	16%
5-9 yrs. old	25%
10-14 yrs. old	31%
15-18 yrs. old	26%

Average age is 10.1 years old

Children’s Health Segments+



NUMKIDS How many children, in total, do you have 18 or younger for whom you are responsible (including if you or a spouse/partner are pregnant)? | KIDAGES How old are your children? (n=1,000)  
HEALTH For your (#) child, which of the following best describes their current health situation?  
+Combined across all children 18 or younger in household.

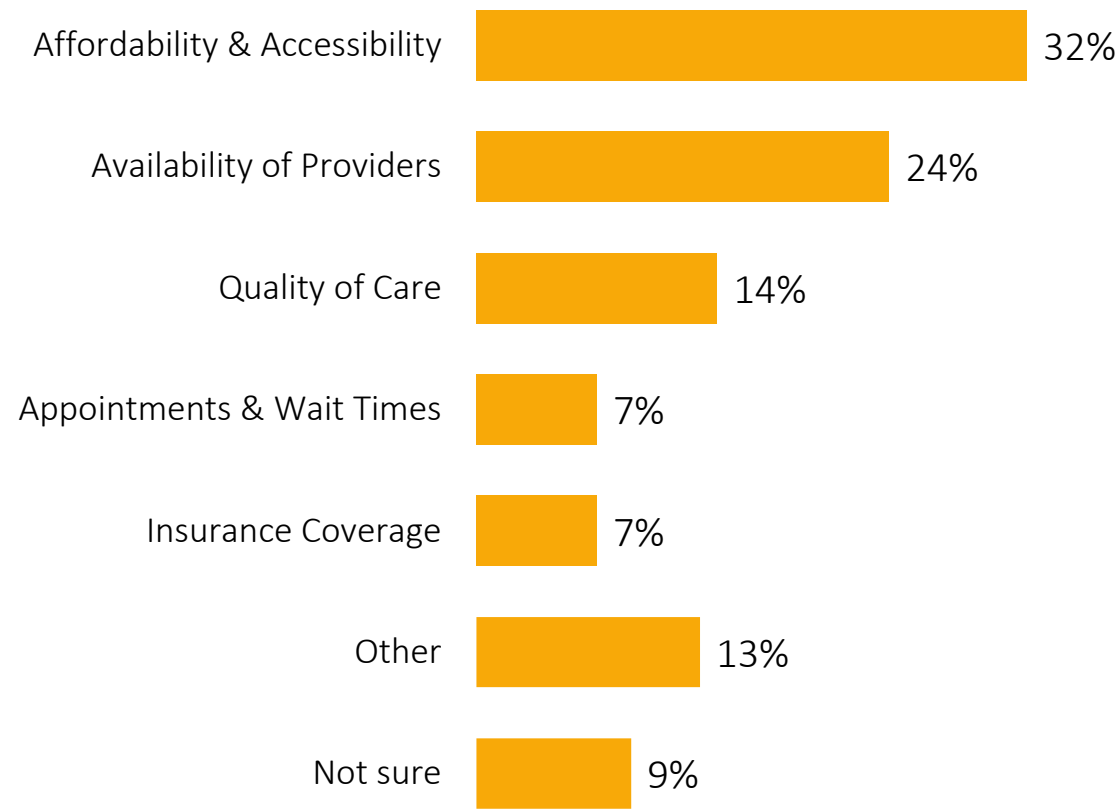
Utilization is clearly correlated with their child’s health

Healthcare Utilization (for youngest child if more than one)  
by Children’s Health Segments^

Children’s Health Segments+ →		79%	6%	11%	3%
Utilization by Children’s Health Segments	Total Parents	Healthy (A)	Serious Acute (B)	Chronic (C)	Acute & Chronic (D)
Has a PCP	96%	97%	98%	97%	91%
Adult physician	45%	46%	42%	39%	55%
Pediatrician	45%	45%	47%	49%	23%
Has a Specialist	23%	17%	40% A	67% AB	82% AB
Hospitalization	15%	12%	40% AC	19% A	64% ABC
Urgent Care Visit	43%	41%	62% AC	47%	77% AC
Virtual Visit	27%	24%	40% A	39% A	68% ABC
Sample size	1,000	878	72	112	30

HEALTH For your (#) child, which of the following best describes their current health situation?  
+Combined across all children 18 or younger in household.  
Q10 Who do you consider to be your child's primary care provider?  
Q21 Do any of your children see a pediatric specialist for any type of acute or chronic condition?  
Q24 Has a child of yours been hospitalized for any type of treatment in the past 2 years?  
Q32 In the past year, have you taken your child to an urgent care center for care?  
Q35 In the past year, have you had a virtual visit for your child?  
^Note: If more than one child, questions asked in regard to youngest child.

Suggested Changes to Children’s Healthcare  
in Community (AI generated themes)



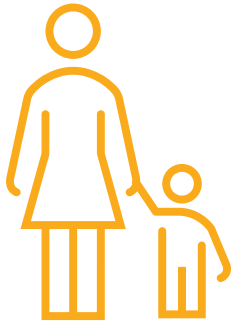
- ❖ **Affordability:** More affordable healthcare options, lower costs, and reduced premiums and copays.
- ❖ **Accessibility and Availability:** More accessible healthcare services, including more doctors, clinics, and hospitals, especially in rural areas. Parents also mentioned the need for shorter wait times and easier appointment scheduling.
- ❖ **Free Healthcare:** Parents expressed the wish for free healthcare for children, regardless of their family's financial situation.
- ❖ **Quality of Care:** Better doctors, more pediatric specialists, and improved bedside manners.
- ❖ **Insurance Coverage:** Need for broader coverage, acceptance of more insurance plans, and fewer restrictions on services covered.
- ❖ **Mental Health Services:** More resources and support for conditions like autism and ADHD.
- ❖ **Proximity and Location:** Need for healthcare facilities to be closer to home, reducing travel time and making it easier to access care.
- ❖ **Specialized Care:** More specialized care, particularly for children with specific health needs or conditions, was frequently mentioned.
- ❖ **Preventive Care and Education:** Importance of preventive care, education on healthy lifestyles, and wellness programs.
- ❖ **Dental and Vision Care:** Need for better dental and vision care coverage, including orthodontics and eyeglasses.



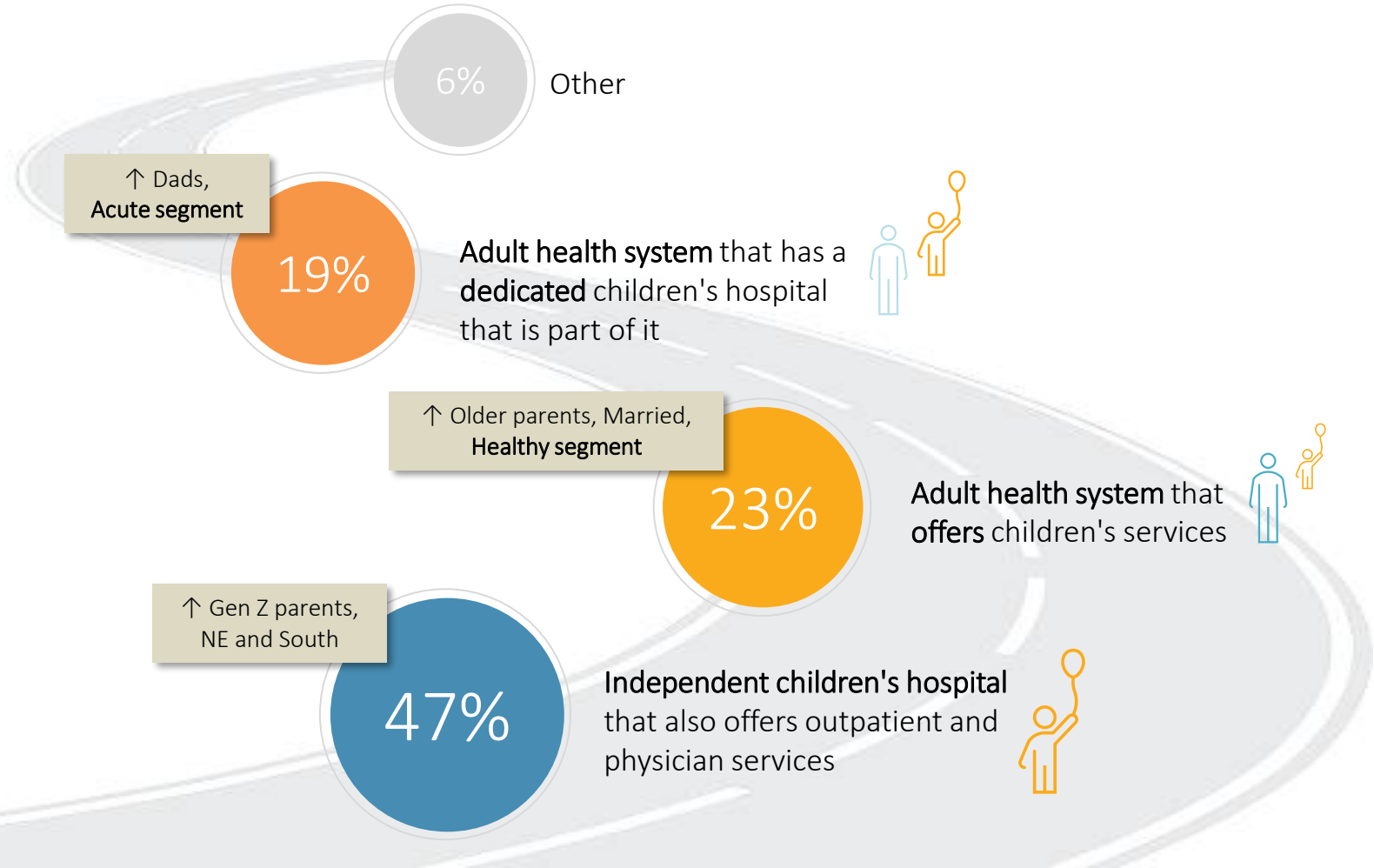
PREFERRED PEDIATRIC PROVIDER

The health of their child does impact the type of children’s organization parents prefer most (adult system that offers children’s services vs. adult system with a children’s hospital), but one thing a majority of parents prefer is a dedicated children’s hospital

80%  
Have a **most preferred** healthcare organization for their (youngest) child’s care^



Preferred Healthcare Organization^  
(Among the 80% with a preference)



Q1 Do you have a preferred healthcare organization that you use most for your child’s care? (n=1,000)  
Q2 How would you describe this preferred healthcare organization you use for your child’s care? (n=795)  
^Note: If more than one child, questions asked in regard to youngest child.

Loyalty is a multi-faceted construct to parents involving Quality - interpersonal skills, clinical skills, and coordination skills; Access (i.e., no banker’s hours), Affordability, and you are ‘100% focused on children’

Factors Determining Loyalty to Child’s Healthcare Organization^  
(Among the 80% with a preference)

↑ Chronic segment



Quality of Care  
61%\*

Compassionate, attentive caregivers	30%
Best treatment outcomes	24%
Well-coordinated care across caregivers and care settings	15%

↑ Chronic and Acute segments



Access & Convenience  
61%\*

Evening and weekend hours	21%
Convenient urgent care centers	20%
Online appointment scheduling	12%
Virtual visits	11%
On-time appointments with delay notifications	11%

Cost & Affordability  
59%\*



Affordable care	45%
Upfront pricing	11%
Simple, transparent billing	11%

↑ 2+ children, Boomers

↑ Healthy segment



Child-Focused Care  
55%\*

100% focused on children	42%
Emphasis on prevention and wellness	18%

Other Klein & Partners research shows that the perception you are “100% focused on children” is a key factor in choice and loyalty.

Network & Specialization  
52%\*



Top-ranked physicians	22%
Wide access to specialists	14%
Large pediatrician network	12%
Part of a larger health system	7%
Affiliated with a medical school	5%

↑ Gen Z



Reputation & Innovation  
38%

Leading in pediatric research	20%
Access to breakthrough treatments	11%
Nationally ranked by independent organizations	10%

\*NET of percentages shown in the corresponding table

Q3 Next, we would like to understand which of the following factors, if any, would make you most loyal to using one healthcare organization for all your child’s healthcare needs. (n=795)

^Note: If more than one child, questions asked in regard to youngest child.

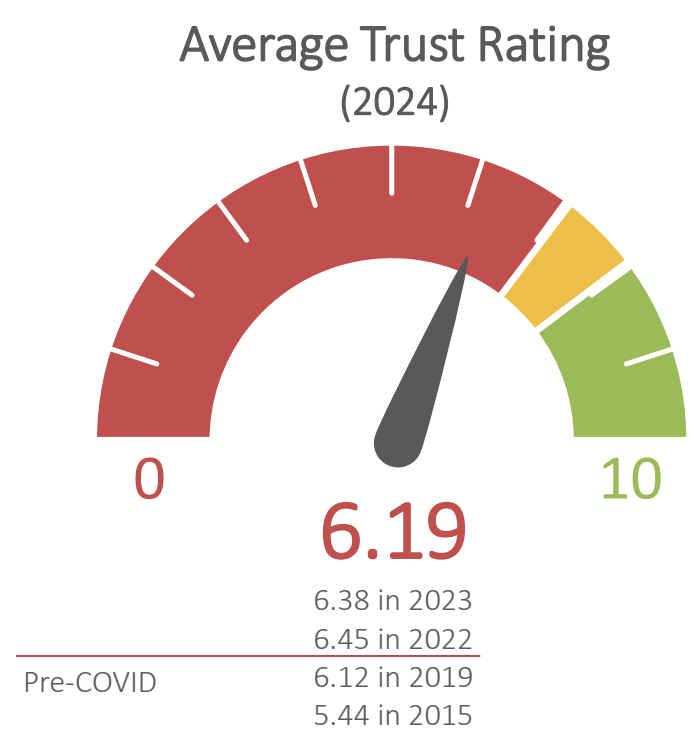


*“The healthcare industry has a lost a significant amount of trust among Americans.”*

*--Rob Klein*

## COMMUNICATIONS WITH PARENTS

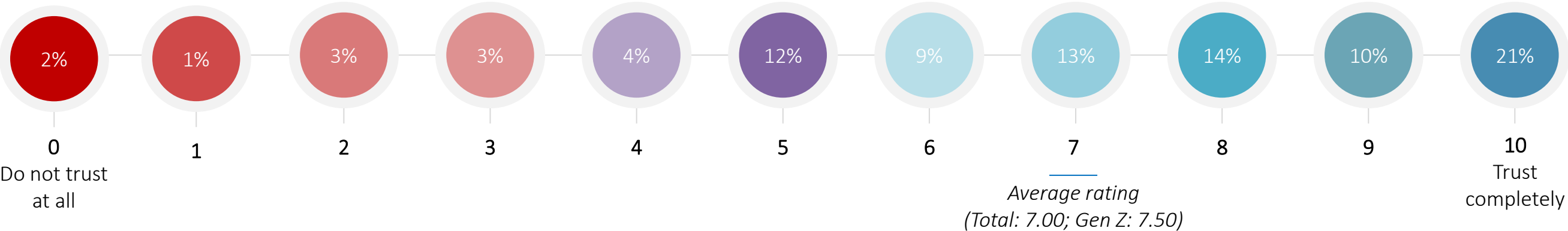
From the 2024 NCIS → Trust is not improving for many healthcare-related organizations, except for children’s hospitals and physicians



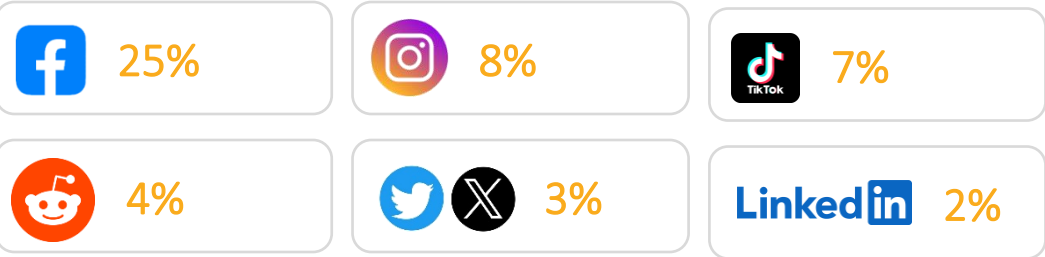
	Do not trust them at all	0	1	2	3	4	5	6	7	8	9	10	Trust them completely	2023	2022	Pre-COVID	
																2019	2015
Children's Hospitals													7.77	7.47	7.44	7.35	7.04
Physicians													7.55	7.39	7.34	7.20	6.69
University Hospitals (Teaching/ Academic)													6.92	6.89	6.92	6.90	6.05
Non-profit hospitals													6.88	6.81	6.84	6.83	6.19
CVS													6.47	6.54	6.68	NA	NA
WebMD													6.23	6.44	6.38	6.22	NA
Google													6.08	6.28	6.24	5.75	NA
US News & World Report Hospital Rankings													5.92	5.93	6.00	6.74	NA
Amazon													5.82	6.22	6.37	5.75	NA
For-profit hospitals													5.70	5.87	6.20	5.82	4.95
Walmart													5.63	5.97	5.89	NA	NA
Health insurance companies													5.53	5.98	6.16	5.32	3.77
Apple													5.32	5.96	5.96	5.07	NA
Pharmaceutical companies													4.84	5.60	5.78	4.52	3.37

Younger parents are much more trusting of children’s hospitals’ social media posts and much more likely to look to social media for a wide variety of ‘tips’ on managing their children’s nutrition, development, mental health and physical activity, and even parenting advice

Trust in Information on Children’s Hospitals’ Social Media Channels



Top Social Media Sites for Health Information for Children



No social media site for peds info: 46%  
(Increases with age: Gen Z: 20%; Millennials: 44%;  
Gen X: 51%; Boomers: 63%)

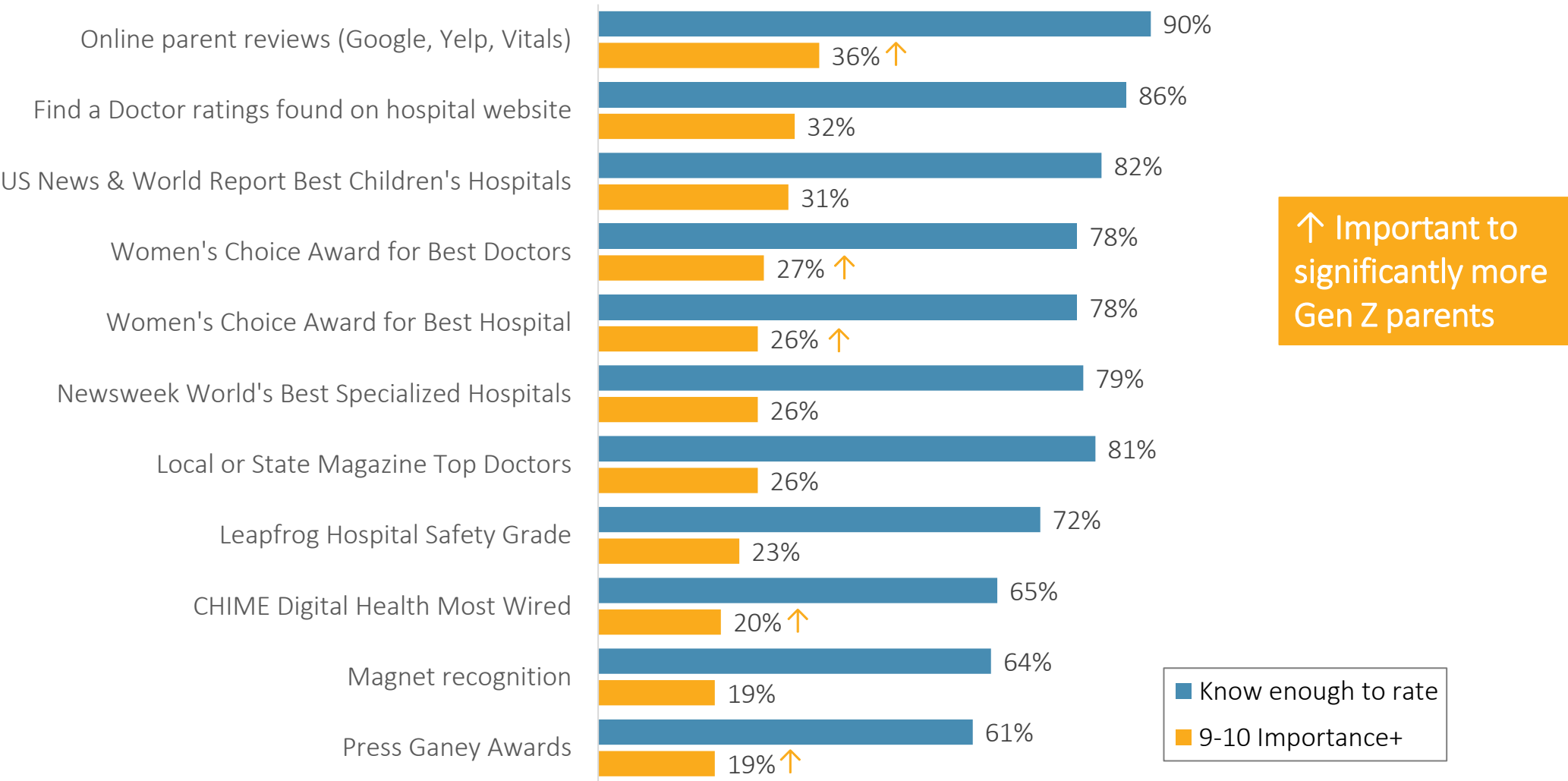
Top Topics Most Helpful for Managing Child’s Health & Well-Being



Q4 How much trust do you have in information that is shared on children’s hospitals’ social media channels?  
Q5 What is the top social media channel, if any, that you rely on most for health information for your children?  
Q6 Following is a list of potential children’s health topics that you might find on a children’s health system’s blog, newsletter, social media channels or other third-party websites. Please select the top 5 topics you would find most helpful to you in managing your child’s health and well-being. (n=1,000)

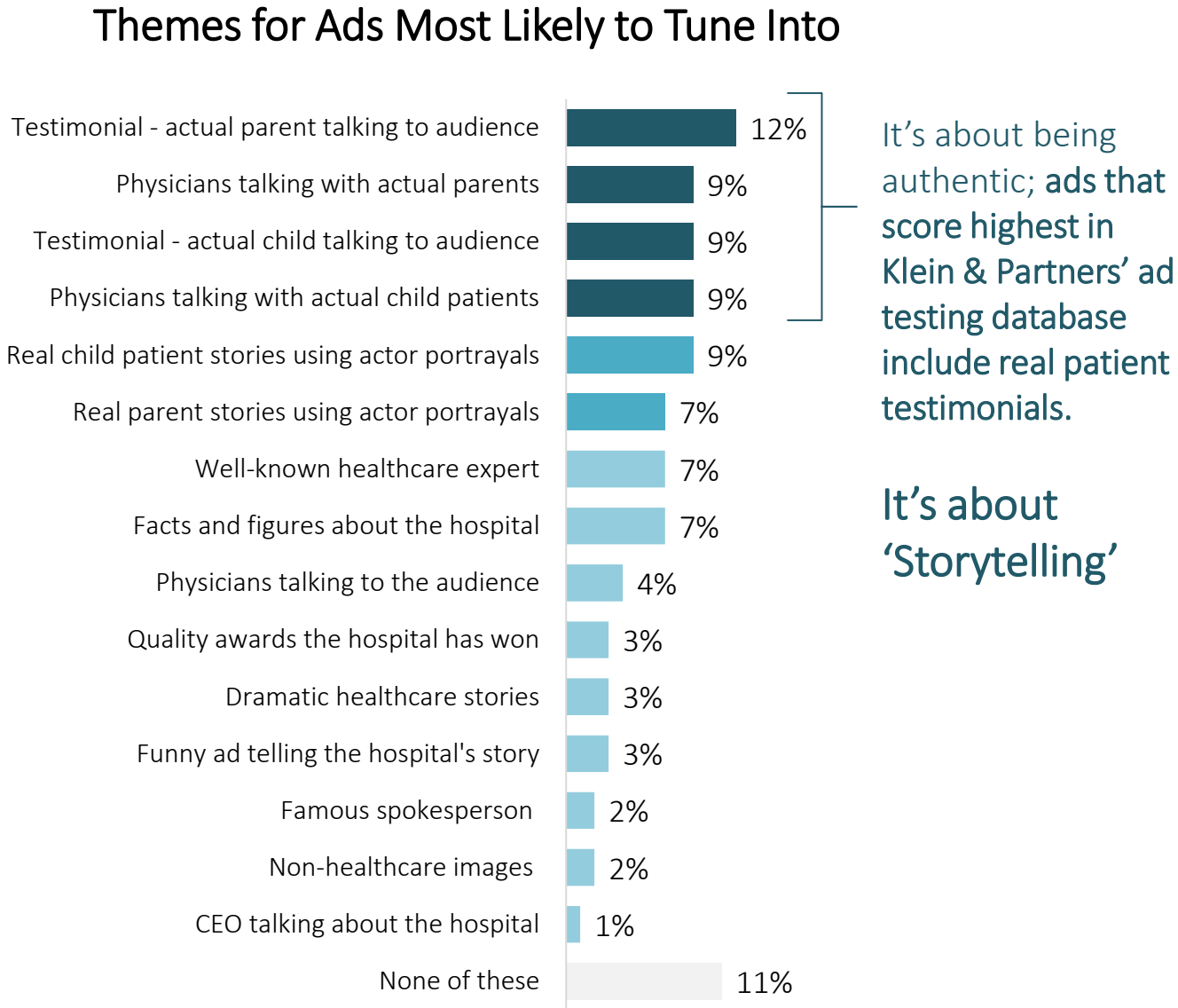
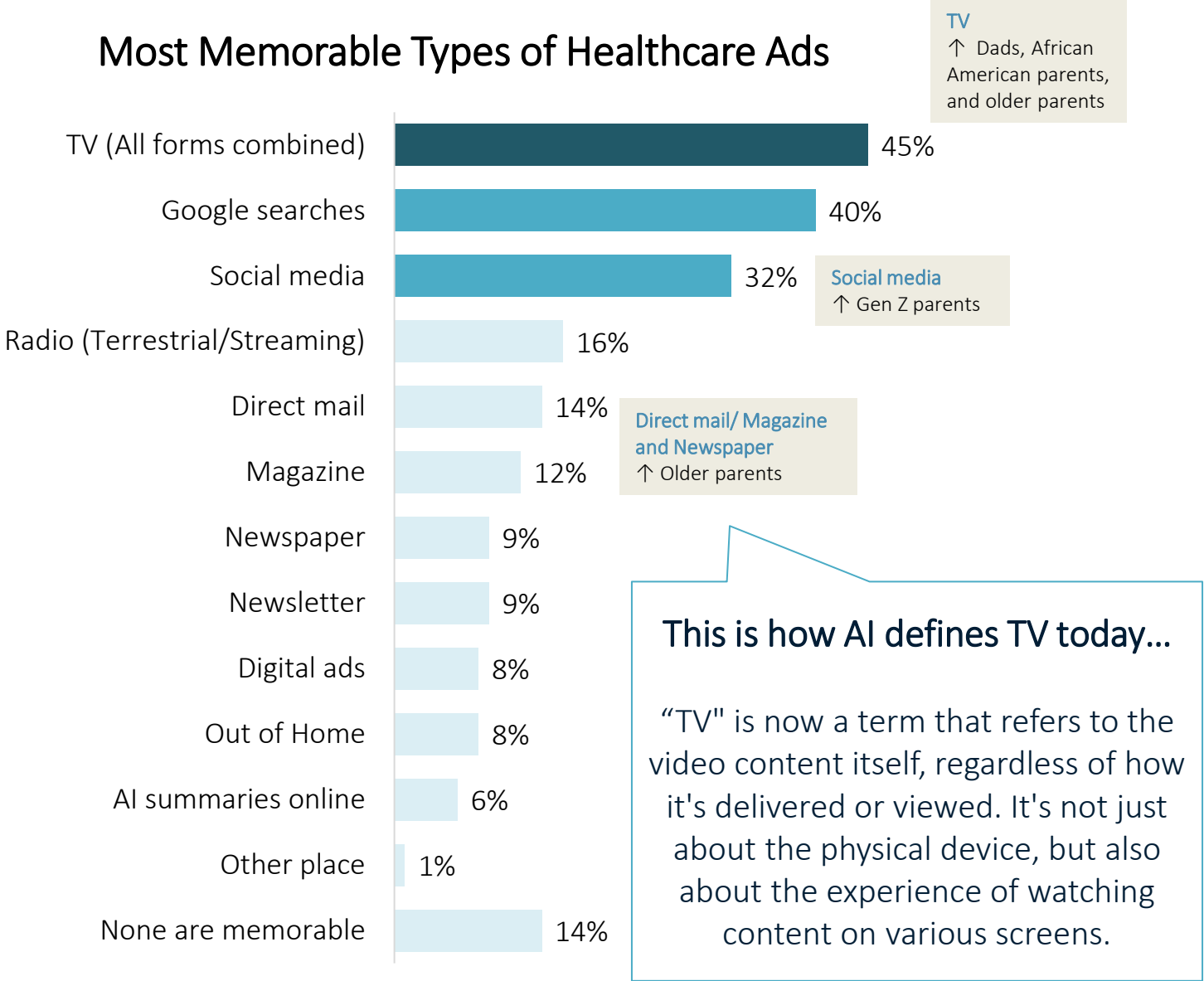
Every one of these sources of hospital information is more important to parents of color; online parent reviews are most important overall and especially to younger parents

### Importance of Sources When Choosing Hospital for Child



Q7 Now, if you were choosing a hospital for your child’s care, how important would each of the following awards and designations be in your decision-making. (n=1,000)  
+Note: 9-10 percentage scores shown based on a 0-10 scale of not at all important to extremely important.

The most memorable pediatric advertising is on ‘TV’ which is very broadly defined today and is focused on content not device; other Klein & Partners research has shown that ‘TV’ creates the strongest ‘brand linkage’ in advertising recall



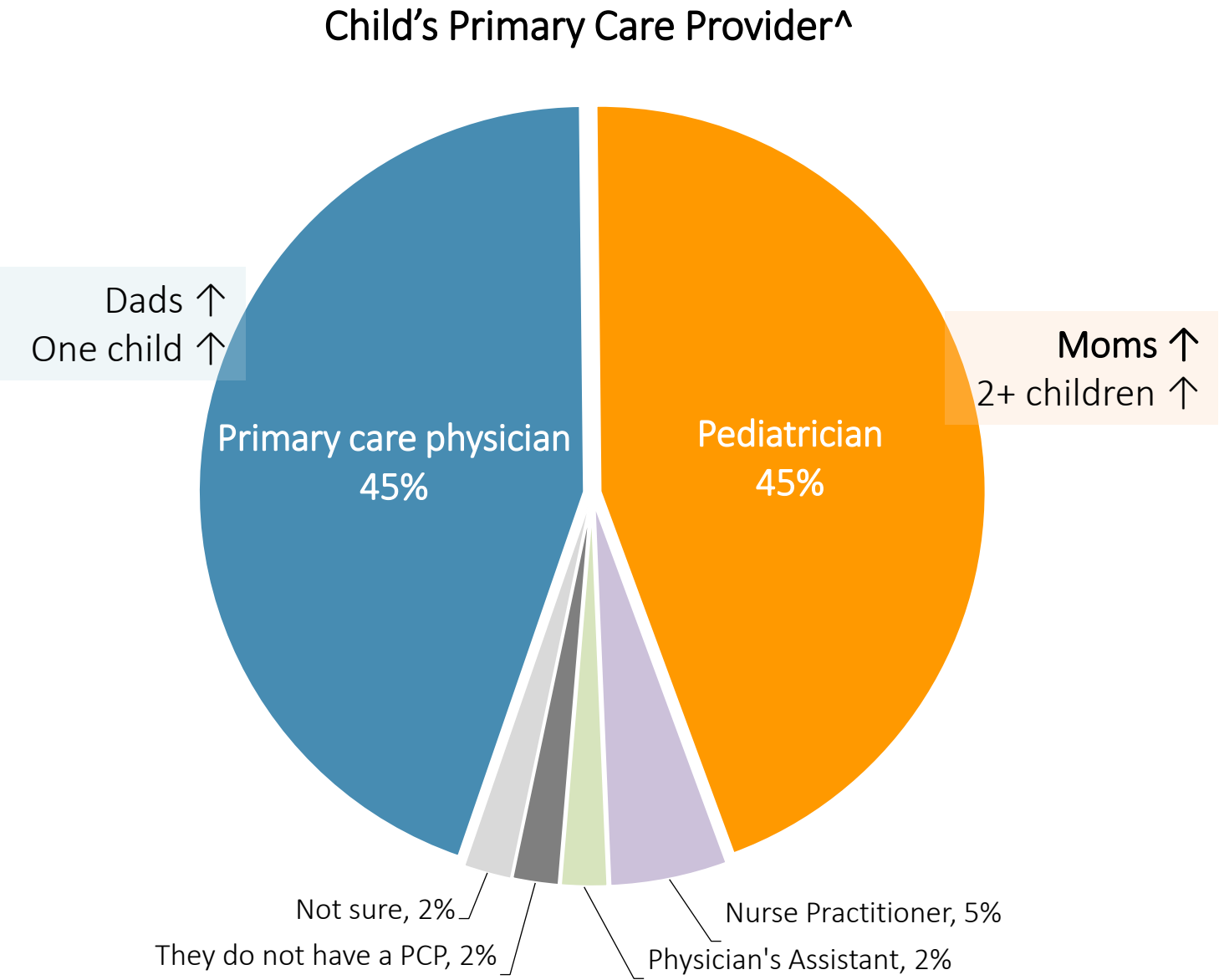
Q8 When you think about different types of places where you can see, hear or read healthcare advertising for children's care, which types of children's healthcare ads are most memorable to you? (n=1,000)

Q9 All TV ads try to convey their message using a variety of themes or story-telling methods. If you saw a TV ad for local children's healthcare services, which one of the following themes would make you MOST LIKELY to tune in and listen to what the ad was saying?



## PEDIATRICIANS

*"People can't love a  
brand they can't use."*  
--Rob Klein



When it comes to picking a primary care provider for their child, location and insurance are driving factors along with a focus on their child's health and wellness → population health for children!

Factors When Choosing Primary Care Provider for Child^  
(Among those who have a PCP for their child)



Doctor's Expertise & Credentials

59%\*

Good bedside manner with kids	18%
Years of experience	17%
Expert in my child's specific condition	13%
Medical credentials & education	12%
Good bedside manner with parents	10%
Highly ranked by independent organizations	7%
Provider's age, sex, ethnicity	3%



Access & Convenience

58%\*

Convenient location	21%
Easy & quick appointment scheduling	16%
Office hours & availability	14%
Accepting new patients	14%
Online scheduling available	7%
Virtual visit options	5%



Insurance & Affiliation

50%\*

In my insurance network	34%
Affiliated with my health system	14%
Refers/admits to my preferred children's hospital	6%



Condition-Specific Support

43%\*

Focused on the health and wellness of children	24%
Extra support services for my child's condition	9%
Guidance from diagnosis to treatment	9%
Coordinated care with other providers	7%



Reputation & Recommendations

41%\*

Recommended by family or friends	17%
Positive online parent reviews & ratings	14%
Referred by another doctor	11%
Referred by maternity team	5%



Communication & Technology

25%\*

Advanced technology	11%
Electronic medical record access	9%
Digital communication options	7%
Clean, modern, comfortable office	20%

Office Environment

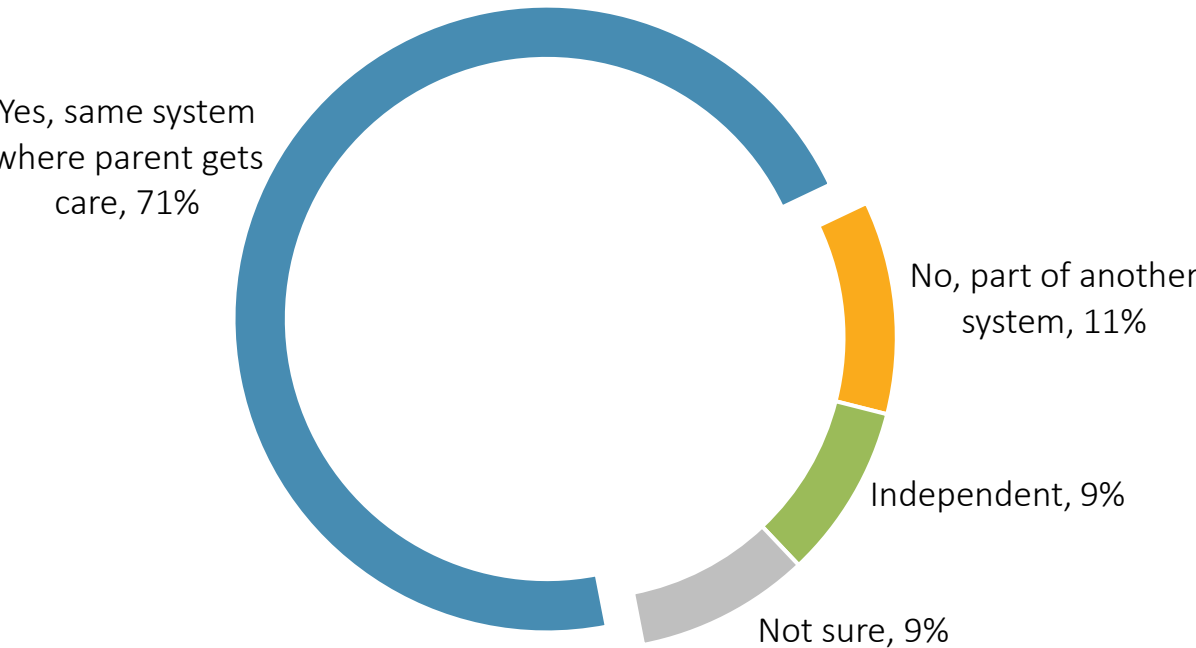
20%



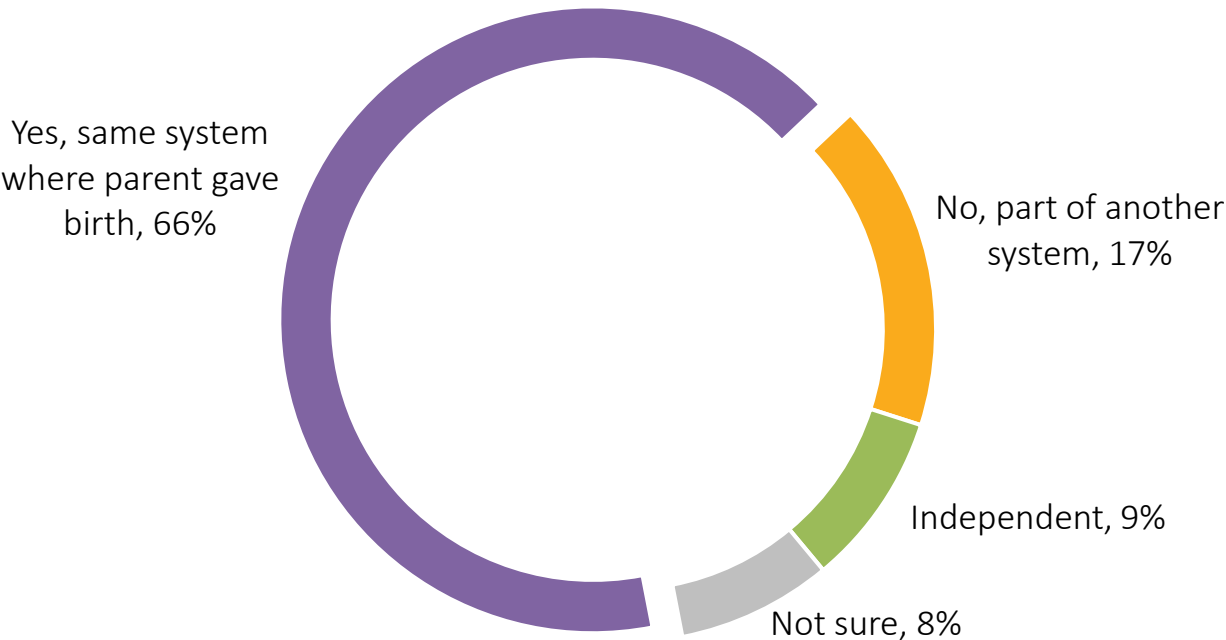
\*NET of percentages shown in the corresponding table

Q11 Now, when you chose your child's current primary care provider which of the following factors did you consider when you were deciding on which provider you chose for your child? (n=1,000)  
^Note: If more than one child, question asked in regard to youngest child.

Child’s PCP Affiliation With Preferred System^



PCP Affiliation With System Gave Birth At^

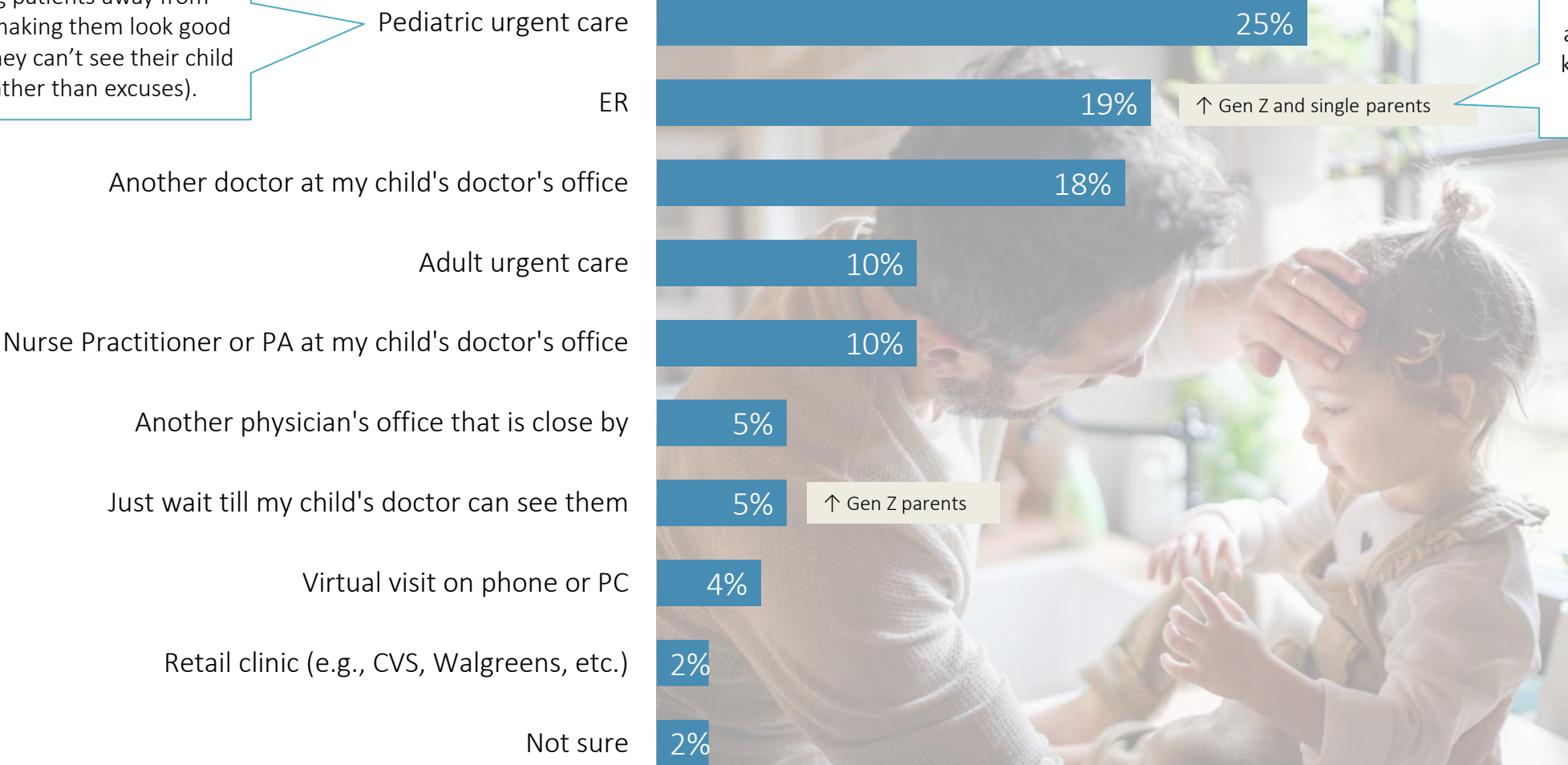


Q12 Is your child's primary care provider affiliated with (i.e., employed by or refers most patients to) your preferred hospital or health system for your care?  
Q13 Is your child's primary care provider affiliated with the same hospital or within the same health system as where you or your spouse/partner gave birth to them? (n=961)  
^Note: If more than one child, question asked in regard to youngest child.

Urgent care is ‘Plan B’ when the pediatrician can’t see their child; a strong pediatric primary care network of urgent care and virtual care is necessary to relieve the access challenge to pediatricians; more physicians is not the answer

Make sure your urgent care options are clearly communicated to both parents and their pediatricians. Internal education is key to explain that urgent care is not taking patients away from pediatricians it is making them look good to parents when they can’t see their child (i.e., solution rather than excuses).

Alternative to PCP When Child is Sick^



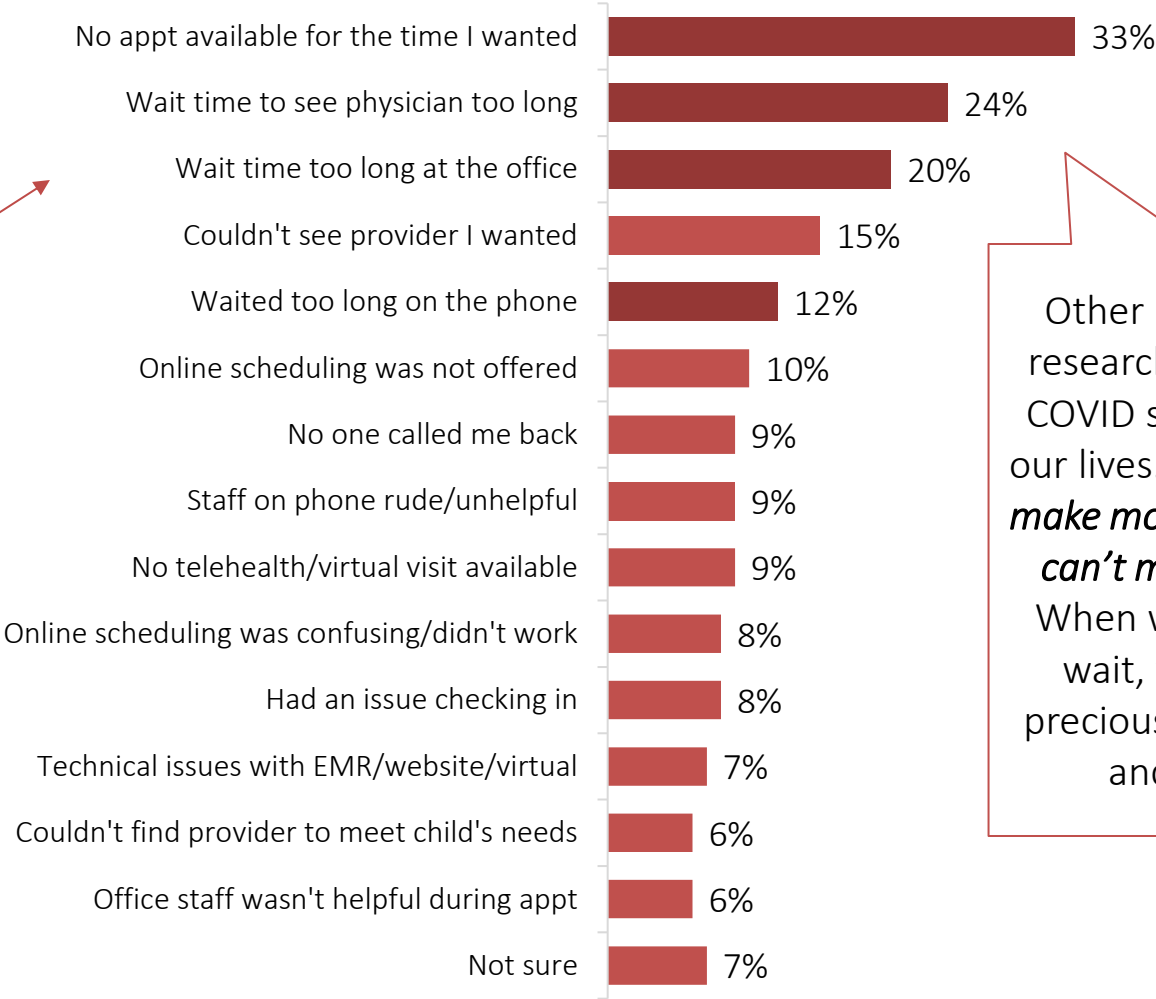
And a strong urgent care and virtual visit strategy is key to keeping parents out of the ER for sick care.

The majority of parents have had difficulties accessing primary care for their child recently and it's all about 'waiting'

Ease of Accessing Primary Care for Child^

Ease of Accessing Child's Primary Care	Total
Every time	32%
Most times	38%
Sometimes	23%
Never	3%
No need	3%
Not sure	1%
Sample size	961

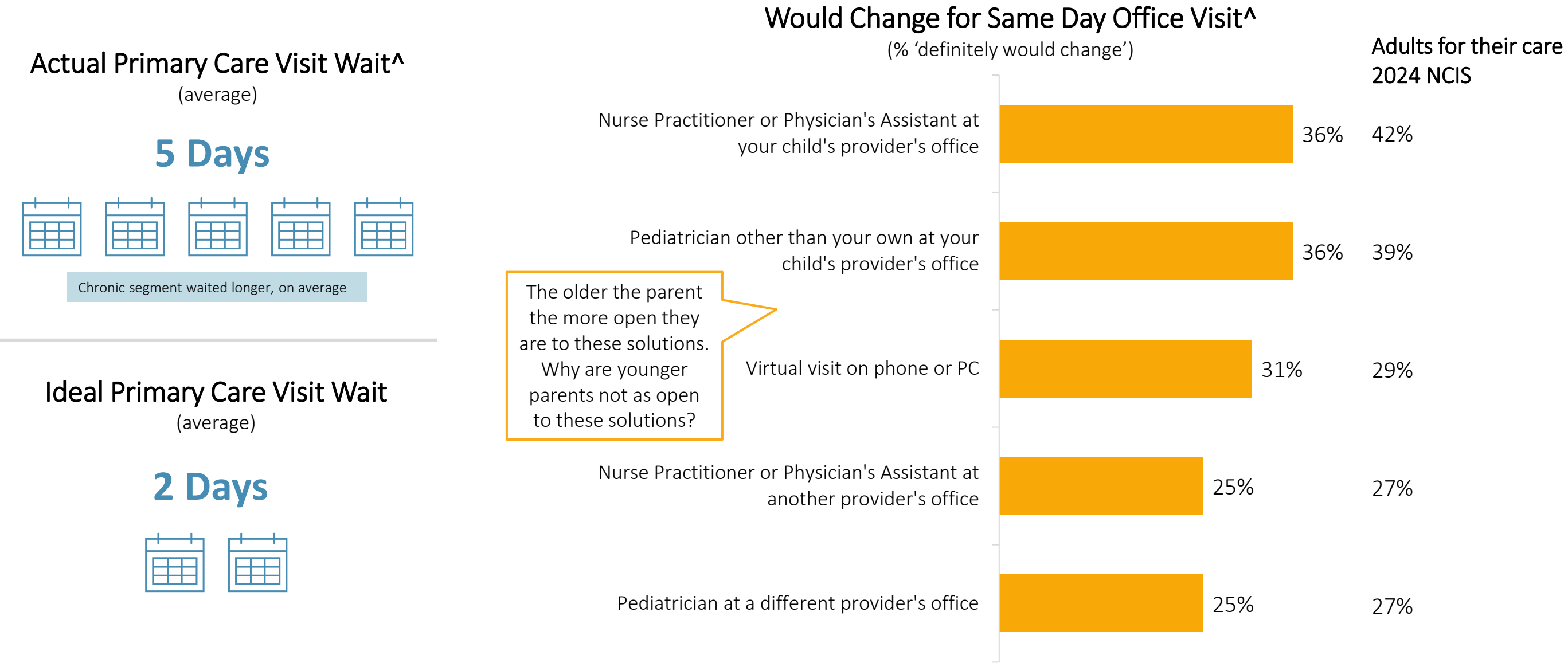
Barriers to Accessing Primary Care^  
(when primary care was not easy every time)



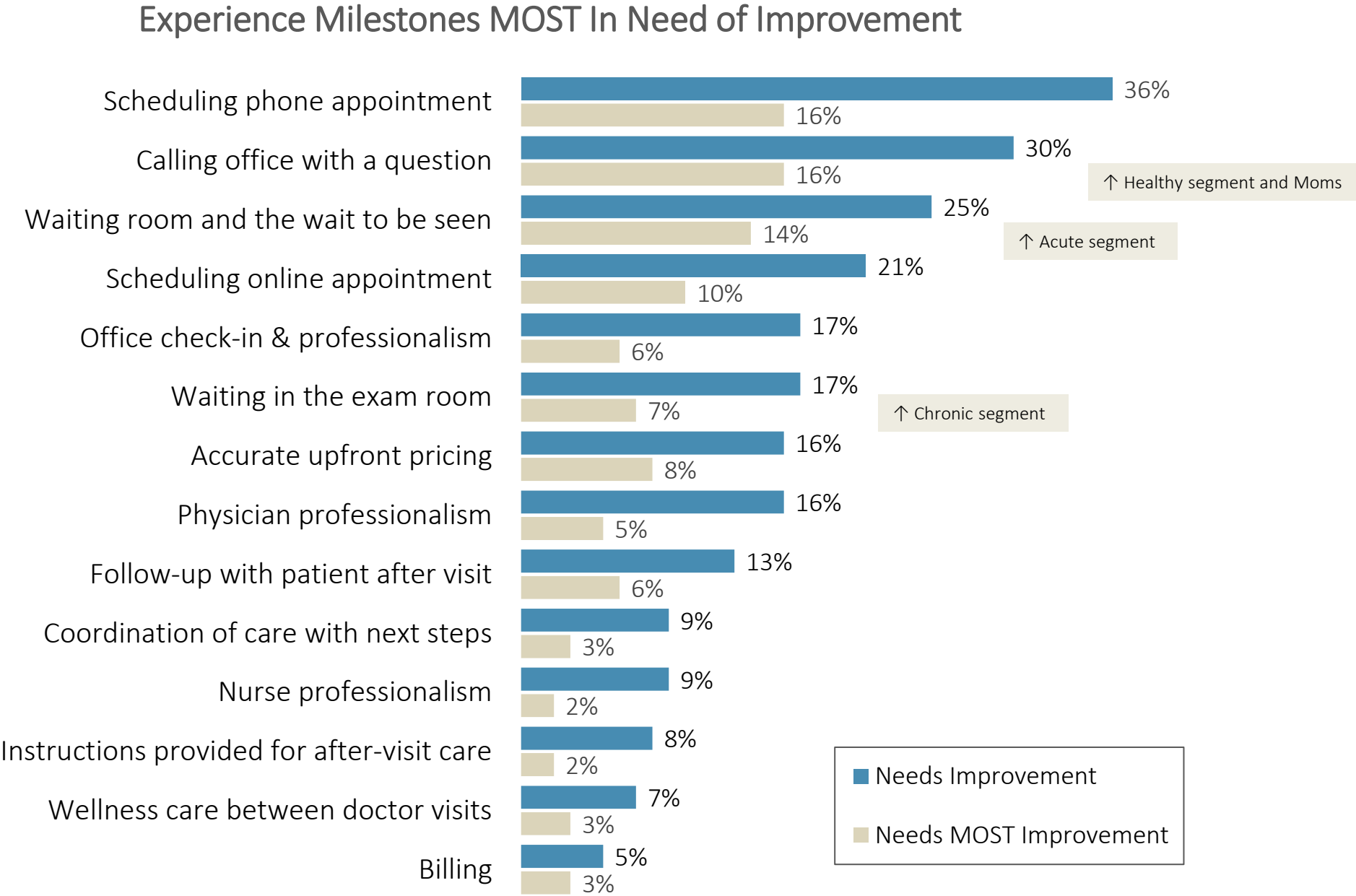
Other Klein & Partners research has shown that COVID stole two years of our lives... ***"You can always make more money, but you can't make more time."*** When we make parents wait, we are stealing precious time from them and their child.

Q15 When it comes to accessing primary care at the provider's office for your child, would you say it is easy...? (n=961)  
Q16 What types of barriers or difficulties did you experience when trying to access care for your child? (n=610)  
^Note: If more than one child, question asked in regard to youngest child.

For the child’s most recent primary care appointment where they had difficulty getting seen, parents report waiting two and a half times longer than they feel they should have had to wait → many are open to solutions...



Q17 How long did it take for your child to be seen for this most recent appointment where you had difficulty?  
Q18 What would an acceptable amount of time have been to be seen for this appointment for your child this most recent time when you had difficulty? (n=610)  
Q19 If the office offered that your child could be seen that same day, would you change to any of the following...? (n=961)  
^Note: If more than one child, question asked in regard to youngest child.



Q20 When you think about taking your child in to see their primary care provider for sick care, which of the following aspects of that experience do you feel need the most improvement?  
Q20A Which ONE of these needs the most improvement? (n=961)

## What needs improvement in the words of parents...

“Sometimes the office people seem rushed and are not always friendly and they are the first person that we talk to, so I think that the front line needs to be friendly and inviting.”

“They hardly will call you back until the end of the day or maybe even the next day, it’s aggravating.”

“Often times when you call to ask a question you are placed on hold until the PA or Nurse can answer you, which may be up to 15 minutes by which time I am totally frustrated.”

“It can take a very long time to get questions answered by the doctor. Years ago, we often would get a response the same day. However, now it can take several days.”

“When greeting a parent who is already dealing with a sick child; positive approach and demeanor means a lot!”

“We always have bad experiences with the front desk and reception for doctor’s offices. The employees are often rude and lack empathy or compassion for patients.”



## PEDIATRIC SPECIALISTS

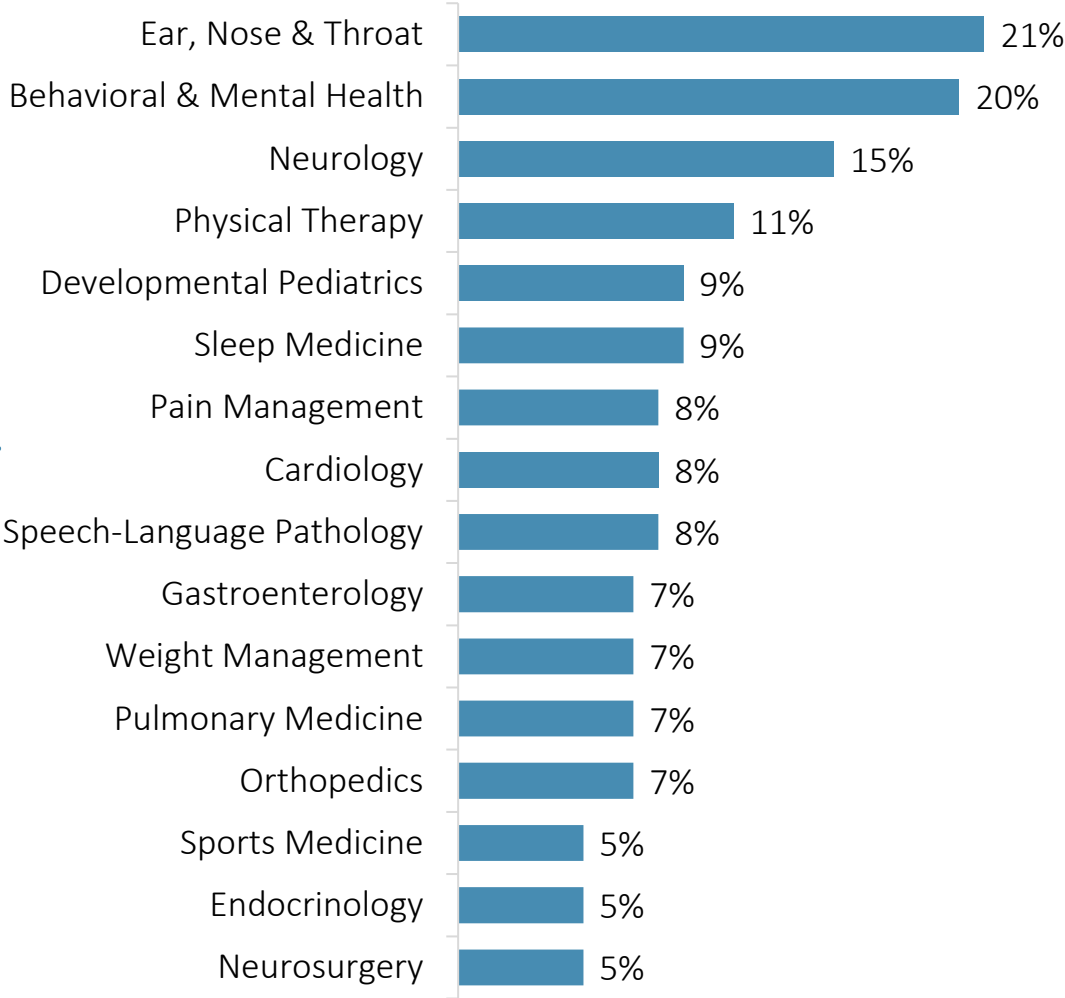
Parents are turning to specialists for chronic care management and mental health is #2 – we are facing a pediatric mental health crisis in this country that must be addressed

Child Has Pediatric Specialist by Children’s Health Segments^

Has a Specialist	Total	Healthy (A)	Serious Acute (B)	Chronic (C)	Acute & Chronic (D)
% Yes	23%	17%	40% A	67% AB	82% AB
Sample size	1,000	878	72	112	30

- Greater use of this specialty care by child’s health segment:
- Healthy: Mental health
  - Serious acute: Cardiology, GI, and Sports med
  - Chronic: Mental health and Cardiology
  - Acute and Chronic: ENT, Neurology, GI, and Ortho

Type of Pediatric Specialty Care^  
(among those who have a specialist)



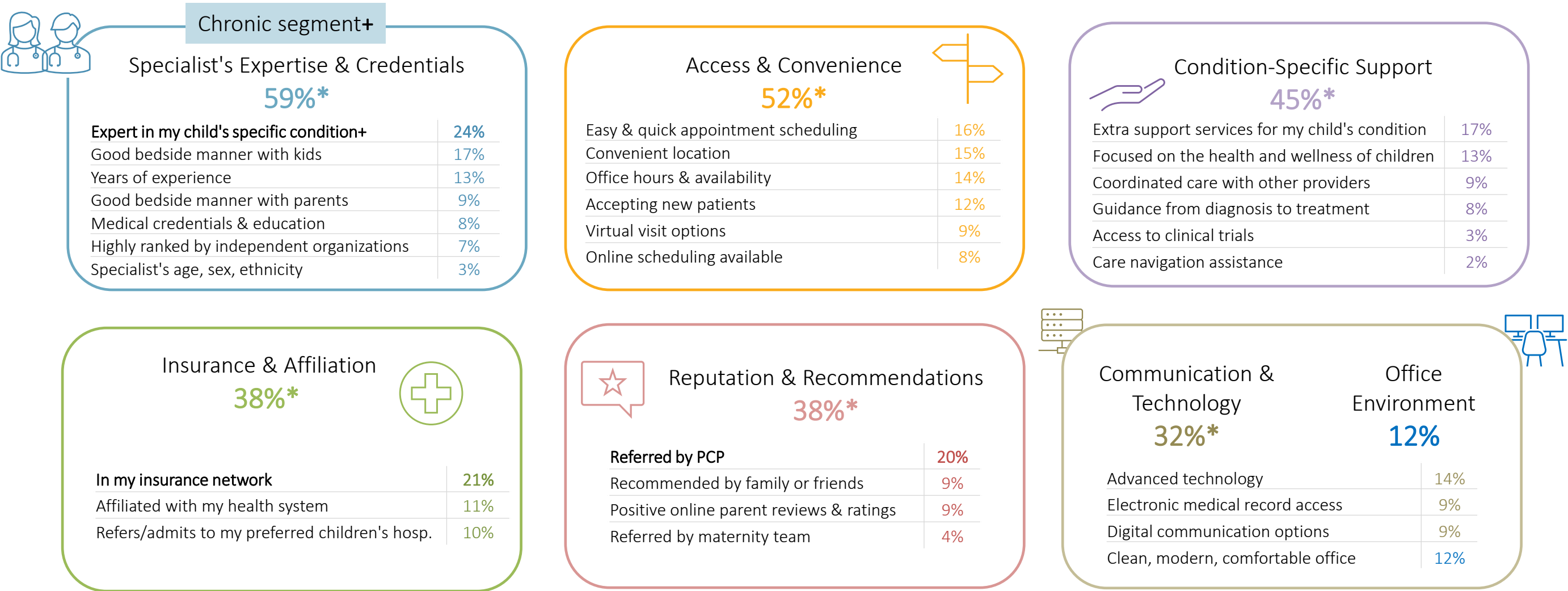
Only showing responses of 5% or greater

Q21 Do any of your children see a pediatric specialist for any type of acute or chronic condition? (n=1,000)  
Q22 What type of pediatric specialty care is your child receiving? (n=232)  
^Note: If more than one child, question asked in regard to youngest child.

Choosing a specialist is more ‘personal’ as parents are looking for a specialist who is expert in ‘my’ child’s condition and was referred by my child’s PCP who knows them... and of course, is in-network

Factors When Deciding Choosing Specialist for Child^

(Among those who have a specialist for their child)



\*NET of percentages shown in the corresponding table



## HOSPITAL EXPERIENCES

The maternity experience often leads to future pediatric hospital care with the same brand family



15%



of children have been  
hospitalized in the past  
2 years

Hospital care by health  
segments:

Healthy: 10%  
Serious acute: 40%↑  
Chronic: 25%  
Acute and Chronic: 50%↑

Child Went to...

Same hospital where gave birth to them	56%
Same health system where gave birth to them	19%
Hospital not connected to where gave birth to them	25%

Where Hospitalized?

Children’s hospital affiliated with adult system	37%
Independent children’s hospital	33%
Adult hospital with pediatric wing/unit	25%
Other/Not sure	5%

Why Hospitalized?



56% Non-Life Threatening/  
Routine



36% Serious/Life Threatening



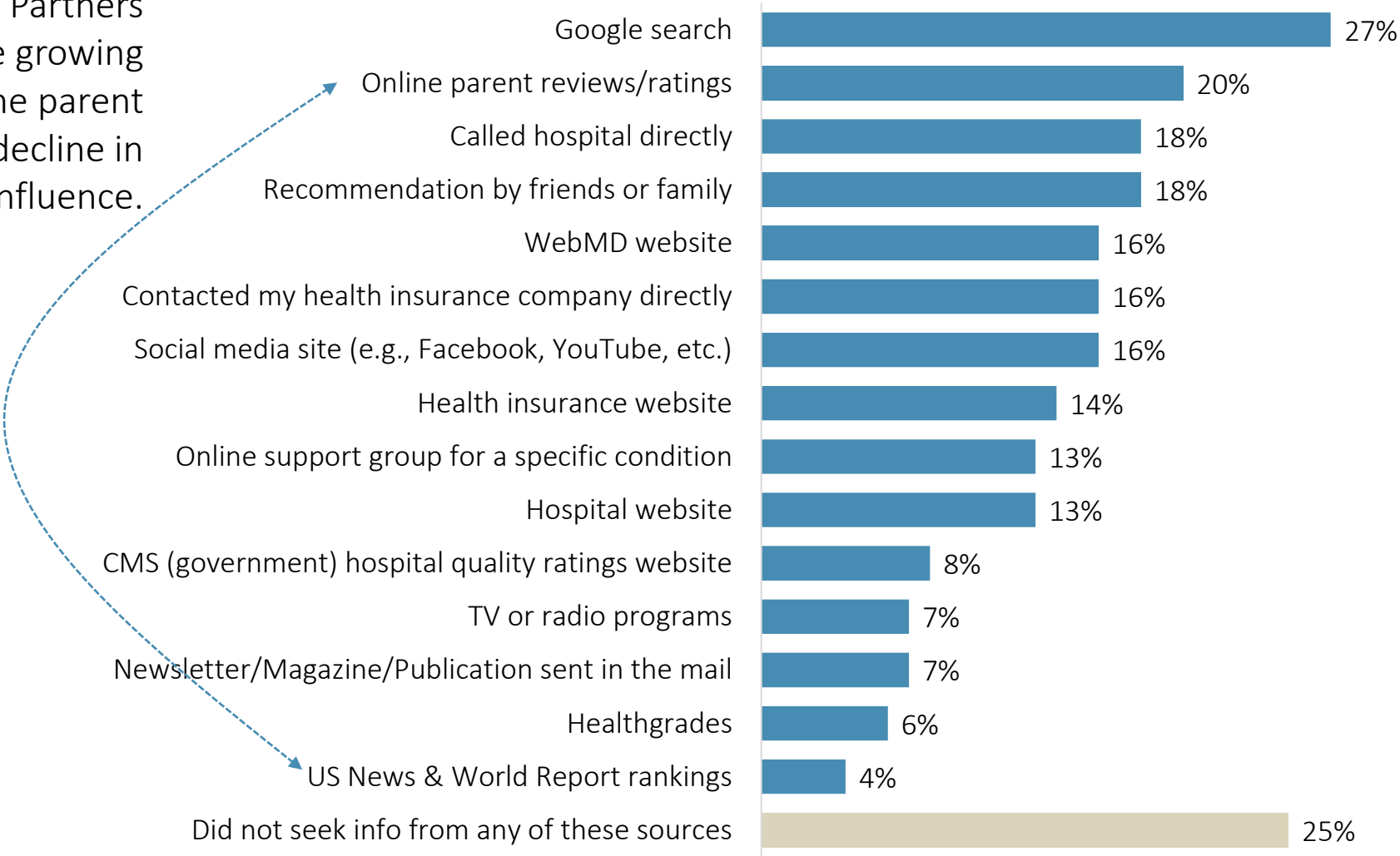
7% Other/Not Sure

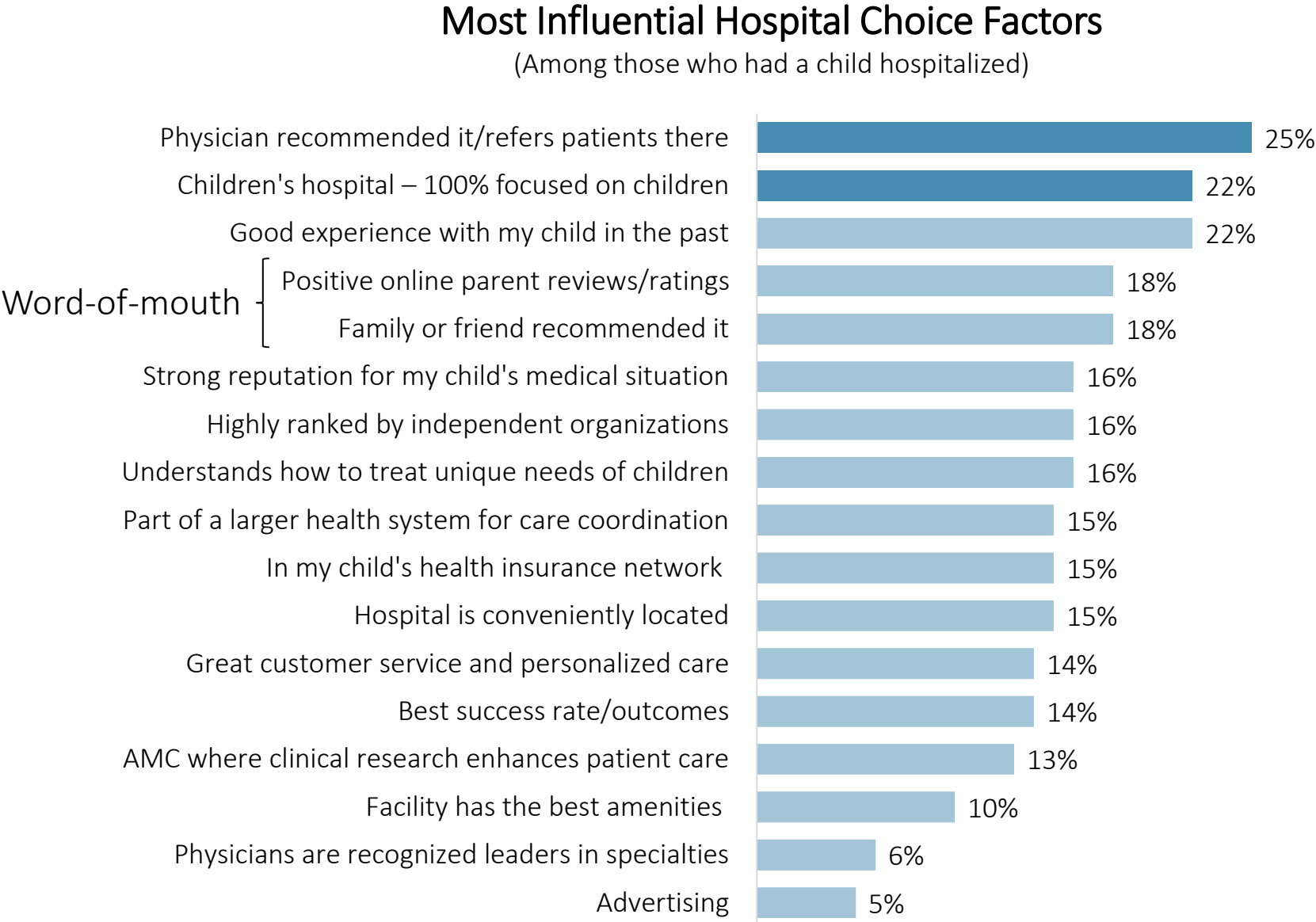
Q24 Has a child of yours been hospitalized for any type of treatment in the past 2 years? (n=1,000)  
Q25 Was your child treated at the same hospital or within the same health system as where you or your spouse/partner gave birth to them?  
Q26 Would you say this most recent hospital stay for your child was...?  
Q27 What type of hospital did your child go to for this most recent care? (n=154)

### Useful Sources When Choosing Hospital for Child

(Among the 15% whose child was hospitalized)

Other Klein & Partners research shows the growing influence of online parent reviews and the decline in US News' influence.

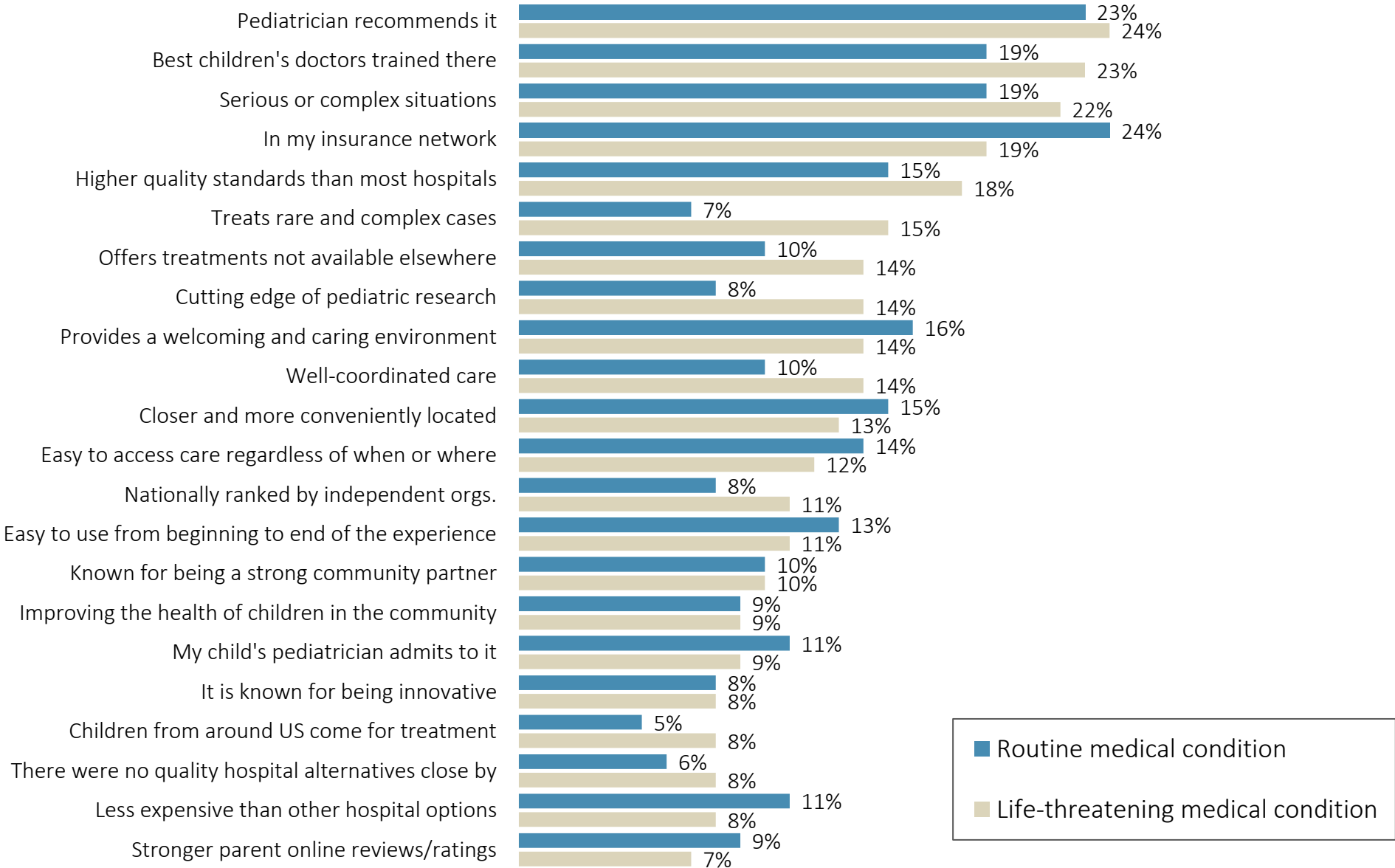




The decision to take their child to a children’s hospital is mostly a function of pediatrician recommending, in-network, and offering cutting-edge research and treatment not available elsewhere through higher standards than most hospitals – whether a routine or serious situation

### Choosing A Children’s Hospital Over An Adult Hospital

(Among those who had a child hospitalized)



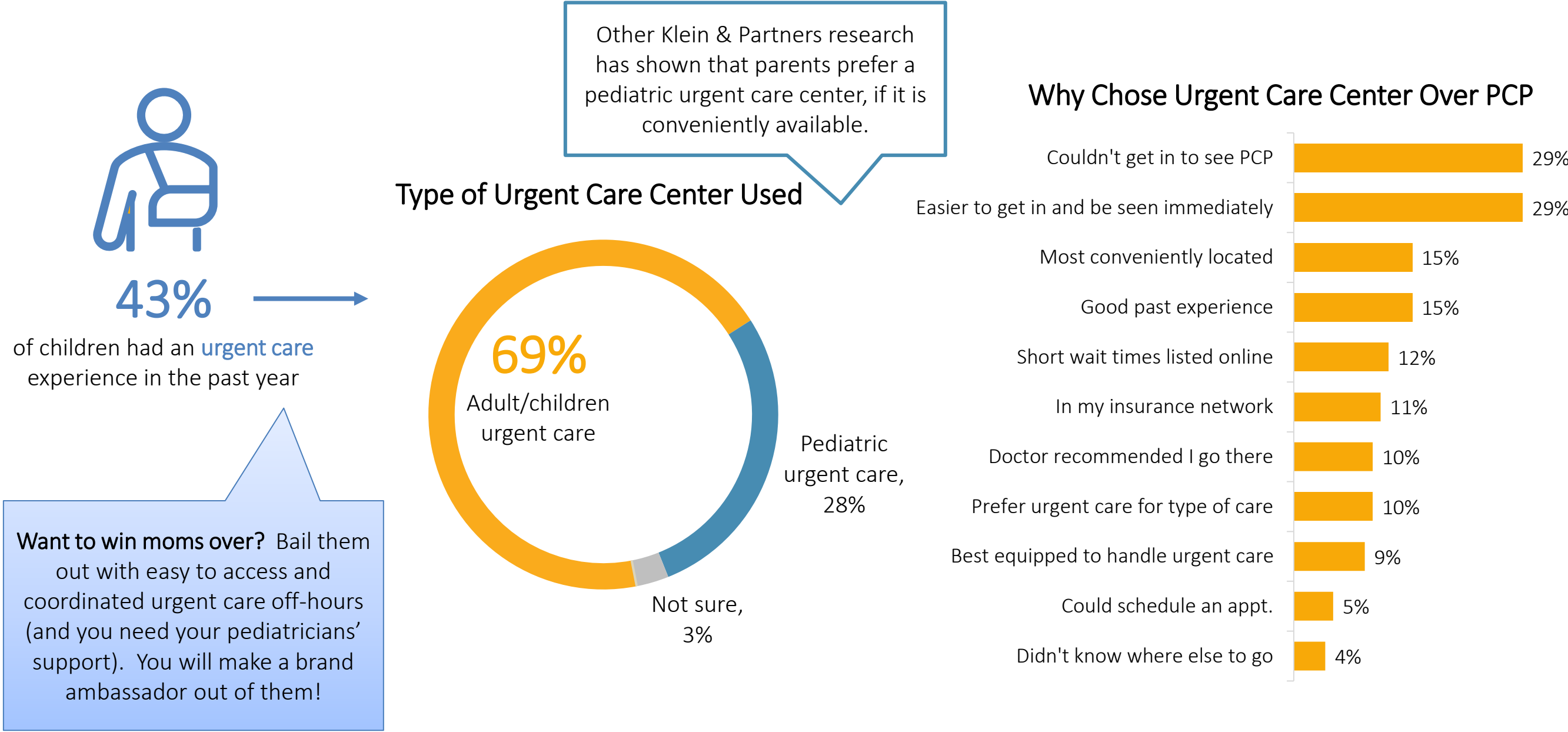


*“Urgent Care is ‘Plan B’ when the physician fails to see my child.”*

*--Rob Klein*

## URGENT CARE & VIRTUAL VISIT EXPERIENCES

Urgent care is ‘Plan B’ when the doctor can’t see their child in a timely manner (especially for moms); again, the battle for market share growth will happen at the top of the sales funnel through routine care



Q32 In the past year, have you taken your child to an urgent care center for care? (n=1,000)  
Q34 Is this urgent care center that you took your child to most recently a pediatric-specific urgent care center or an urgent care center that sees adults and children?  
Q33 Why did you choose to go to an urgent care center for urgent care over going to your child's physician? (n=433)

Virtual visits are about comfort, access, and ease; concerns over virtual visits are typical ‘new tech’ objections but what is important to optimize is how physicians feel about virtual care – many see it as competition to them; your job as marketers is to educate them on how it makes them a ‘brand hero’ and enhances retention



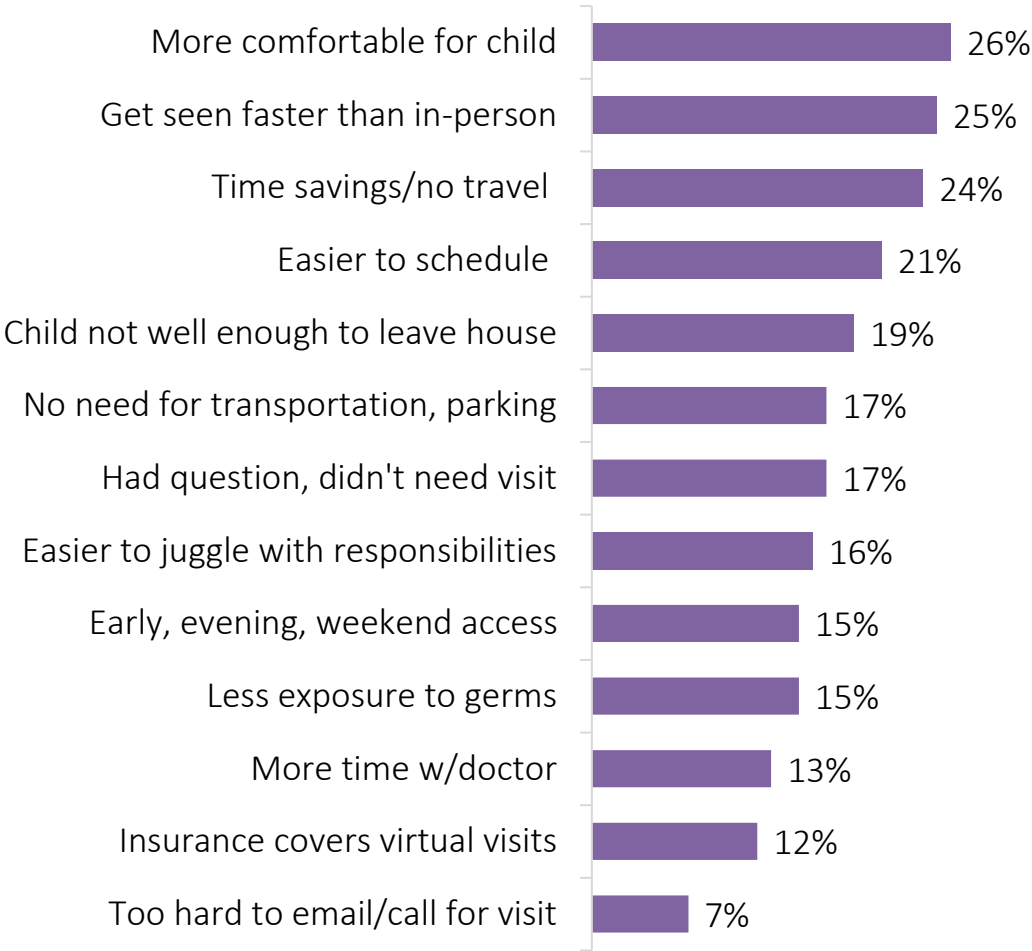
27%

of children had a **virtual visit** in the past year

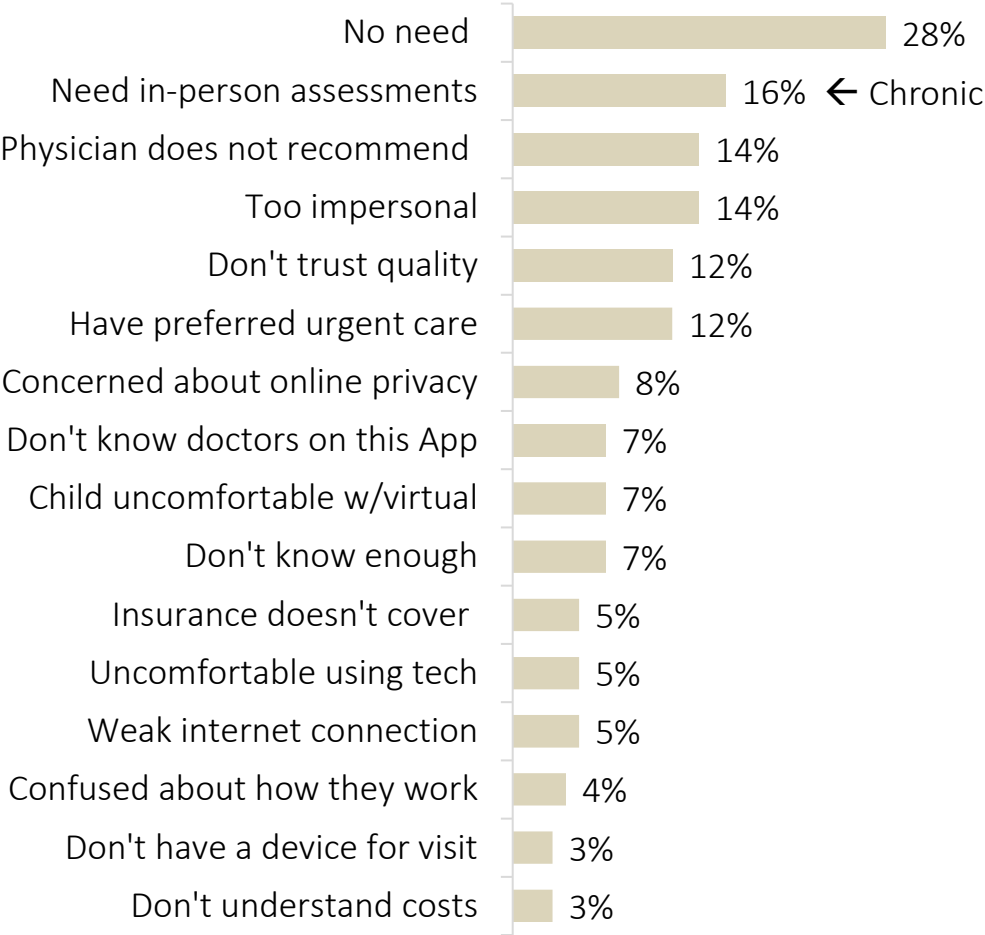
Virtual visit by health segments:

- Healthy: 23% ↓
- Serious acute: 40%
- Chronic: 37%
- Acute and Chronic: 63% ↑

Why Virtual Visit Over PCP Visit?



Why NOT Virtual Visit?



Q35 In the past year, have you had a virtual visit for your child? (n=1,000)  
Q36 Why did you choose to go to an urgent care center for urgent care over going to your child's physician? (n=270)  
Q37 Earlier you said your child has not had a recent virtual care visit with a physician. Why have you NOT used a virtual visit for your child? (n=730)



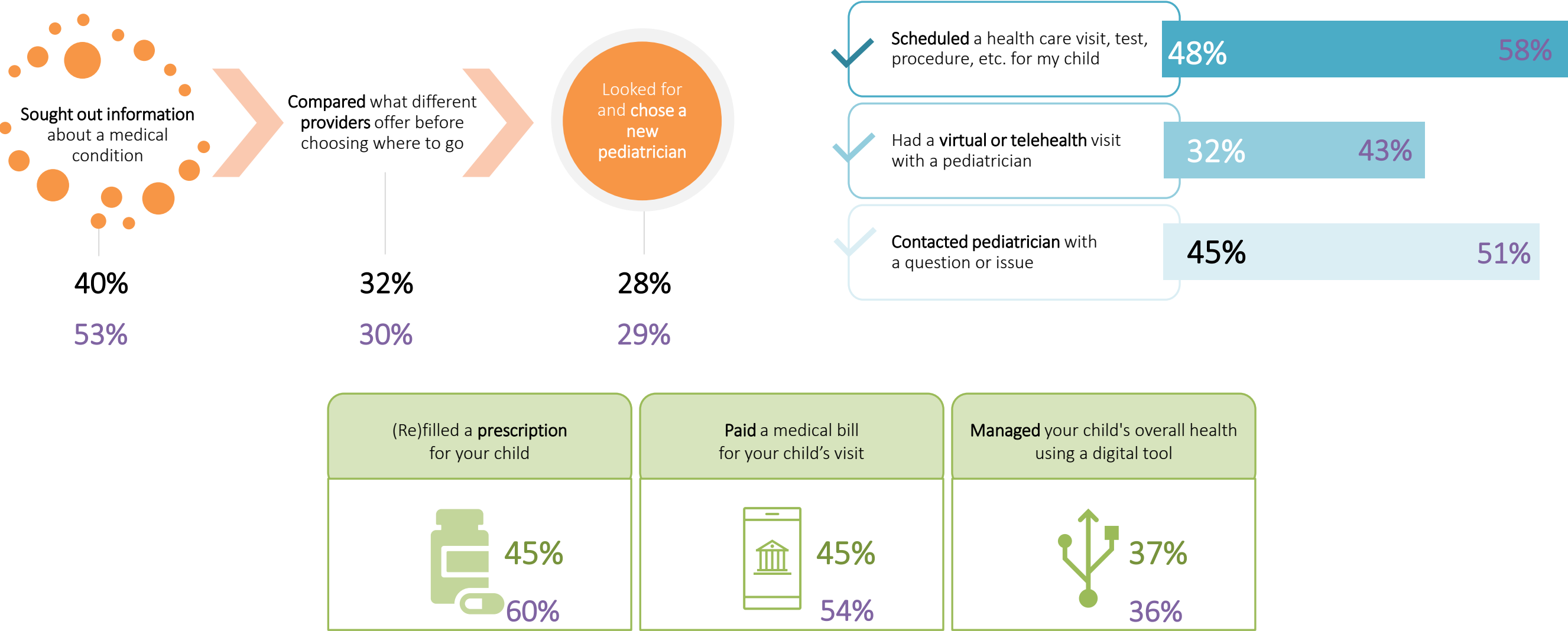
*“Brands must invest in people  
before people invest in brands.”*

*--Rob Klein*

## DIGITAL HEALTHCARE EXPERIENCES

Parents (for their children) are slightly lagging adults (for their own care) across much of the digital healthcare highway  
Q: how can you drive more parent digital behaviors? A: See the next slide.

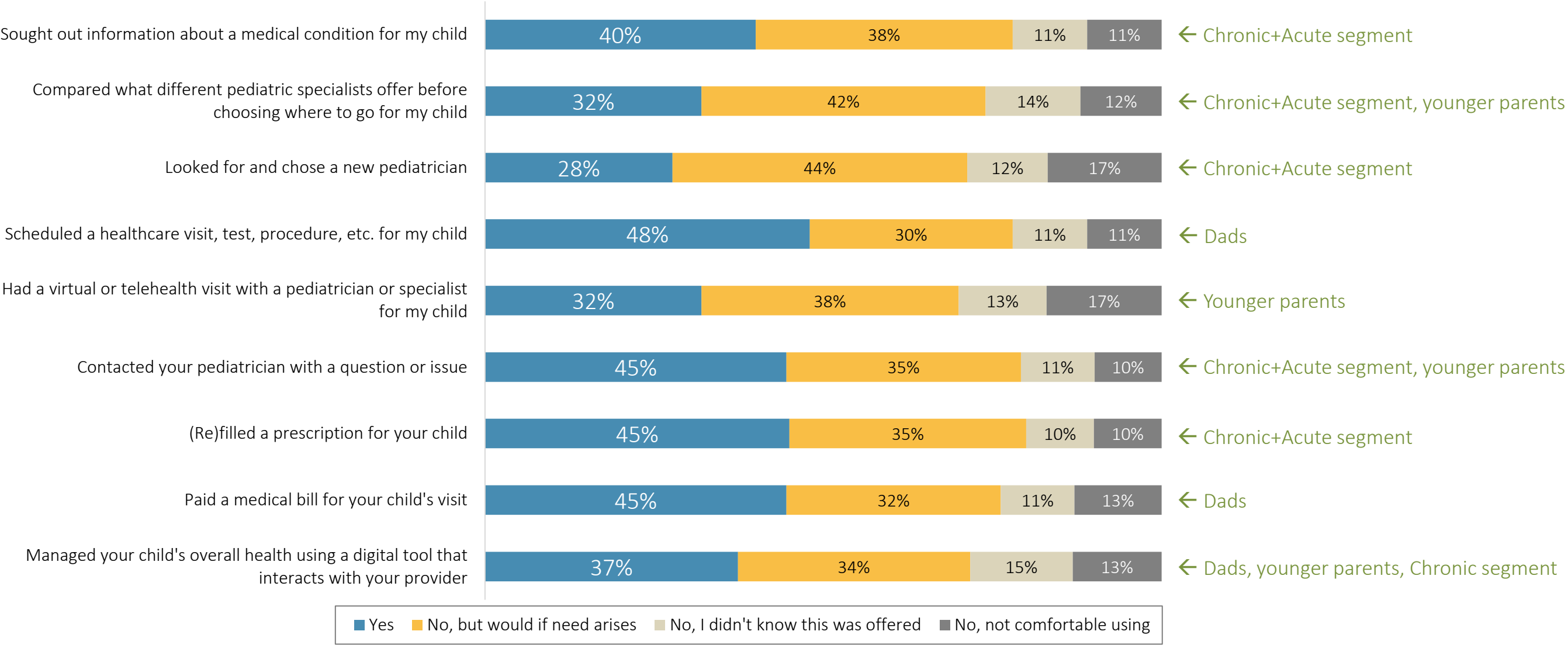
Experiences with Digital Healthcare



There is little resistance to seeking care for their child across any of these digital pathways; if parents haven't done any of these tasks digitally yet, they are open to them when the need arises or simply didn't know they existed → education opportunity

Use of Digital Healthcare

Use is significantly higher for...





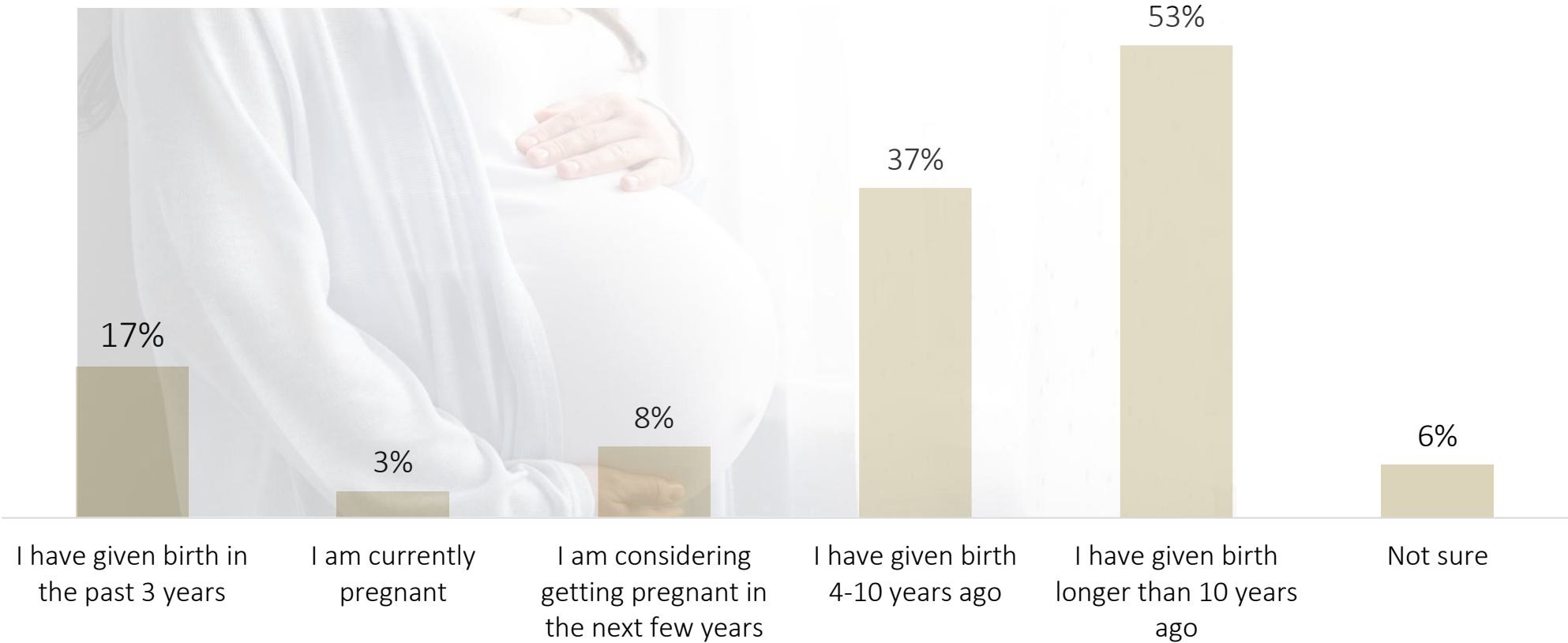
*“An exceptional maternity  
experience can create strong  
lifetime customer value.  
Play chess not checkers.”*

*--Rob Klein*

## MATERNITY EXPERIENCES

Maternity Experiences

(Women only, multiple answers allowed)

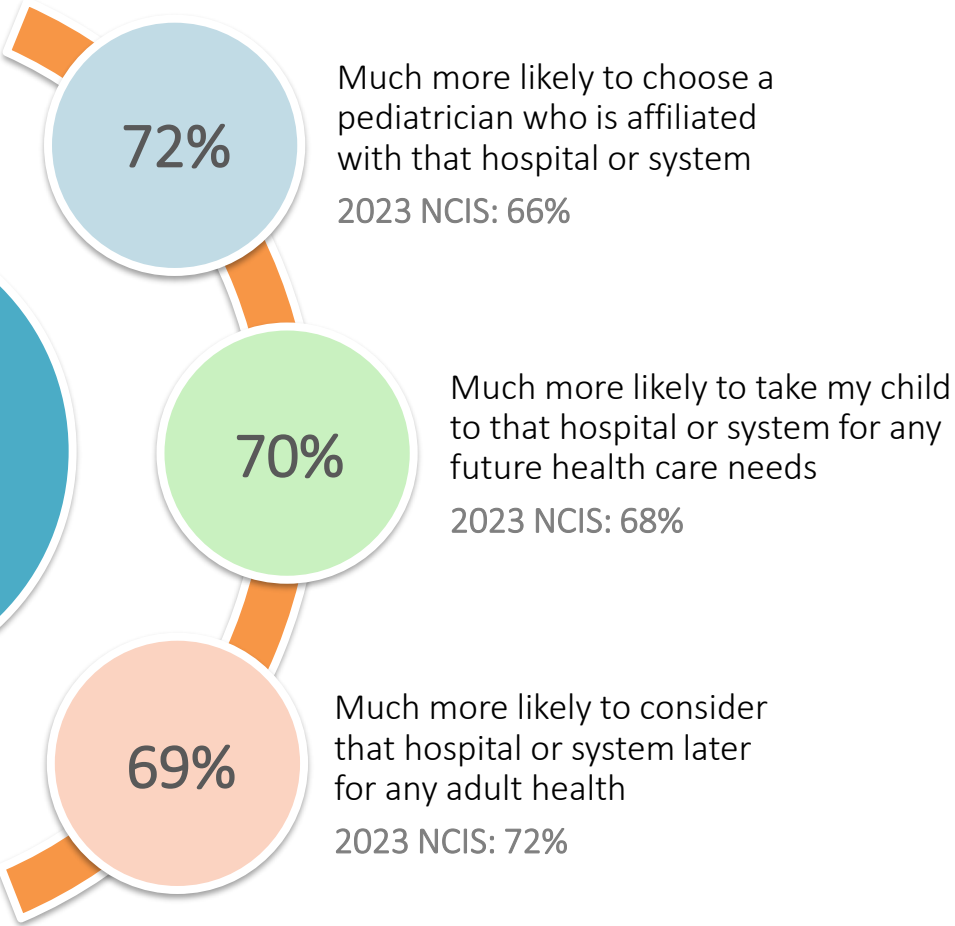


A positive maternity experience significantly increases future pediatric and adult healthcare brand choices while a negative maternity experience almost guarantees lost future pediatric and adult revenue → **excellent maternity experience = lifetime customer value**



**53%**  
of women have had a recent  
maternity experience or are  
considering pregnancy

Positive  
Maternity  
Experience



**66%** of those who encounter a negative maternity experience will not use the hospital or health system for any situation in the future for the household.  
2023 NCIS: 67%

Q39 Please check any of the following statements that describe(s) you currently. (n=696)  
Q40 Please tell us how much you agree or disagree with the following statements... (n=370)  
Note: % Strongly Agree/Agree shown.  
Note: National comparisons are from Klein & Partners' 2023 NCIS adult report findings.



“No patient experience improvement efforts will be effective without addressing these two major hurdles.”

*--Rob Klein*

PRICE SHOPPING AND BILLING → THE “TROUBLE BOOKEND CHILDREN”

Parents are more likely choosing the least expensive option for their child’s care than for their own

22% Price Shopped  
(for child’s care)

2024 NCIS: 21%  
(among all adults for adult care)



More likely to price shop:

- ↑ Gen Z: 39%
- ↑ Dads: 27%
- ↑ Acute situation: 40%

62% Chose Least Expensive Option

2024 NCIS: 46%  
(among all adults for adult care)



% who Price Shopped by Service:

Dental services	19%	Physical therapy	6%
Doctor’s visit	18%	Outpatient surgery	4%
Urgent care	14%	Inpatient surgery	4%
Lab services	11%	Other	2%
Emergency care	11%		
Imaging	11%		

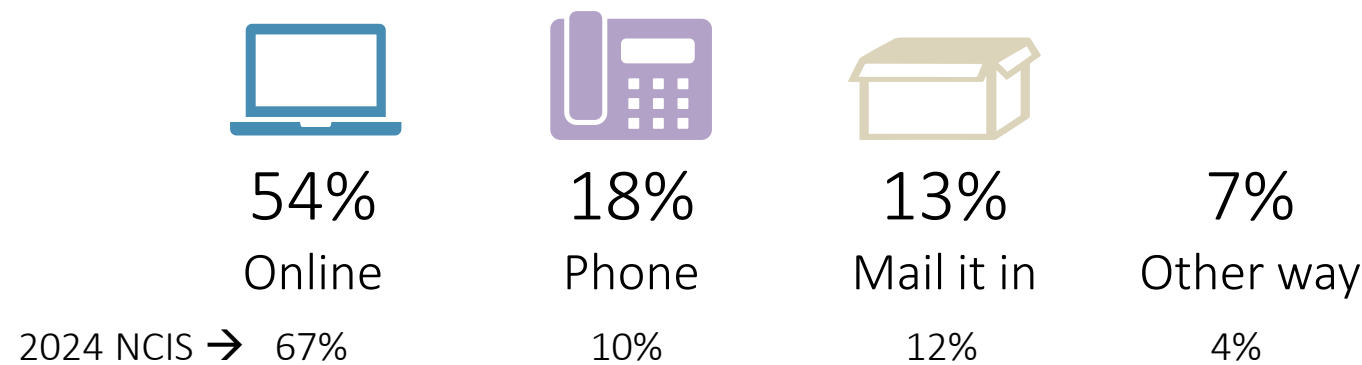
↑ Chronic condition

↑ Gen Z

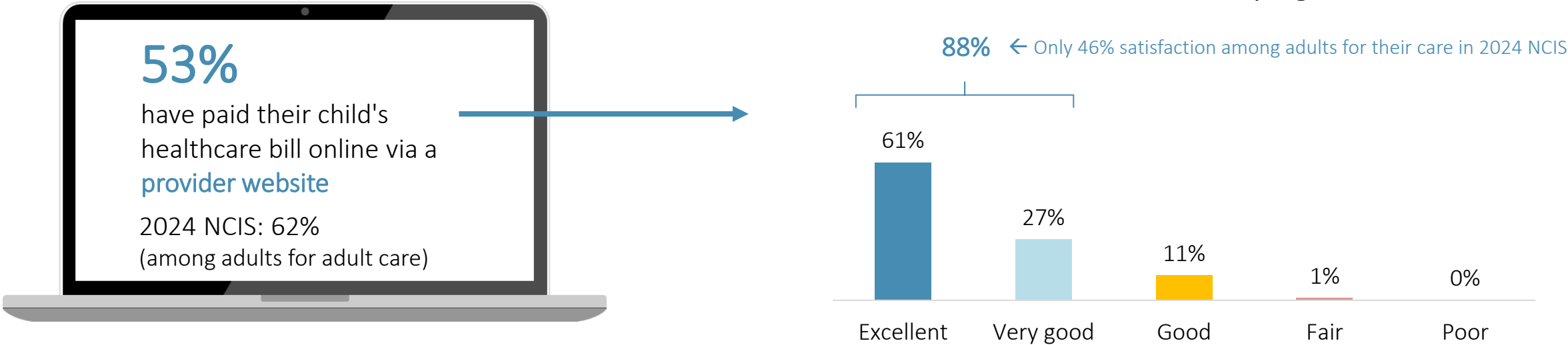
Q41 Within the past year, did you contact any healthcare organizations, hospitals, or physician offices to ask about the price for a specific visit, test, treatment, or surgery for your child? (n=1,000)  
Q42 What type of health service did you ask about pricing for the most recent time for your child?  
Q43 Did you end up choosing the least expensive option for your child's care the most recent time? (n216)  
Note: National comparisons are from Klein & Partners’ 2023 NCIS report findings for adult care.

More parents prefer to pay their child’s healthcare bills via the phone compared to adults paying their own bills; however, if parents pay online, they are more likely satisfied with the process than adults paying for their own care... Why would that be?

Preferred Method to Pay a Health Care Bill



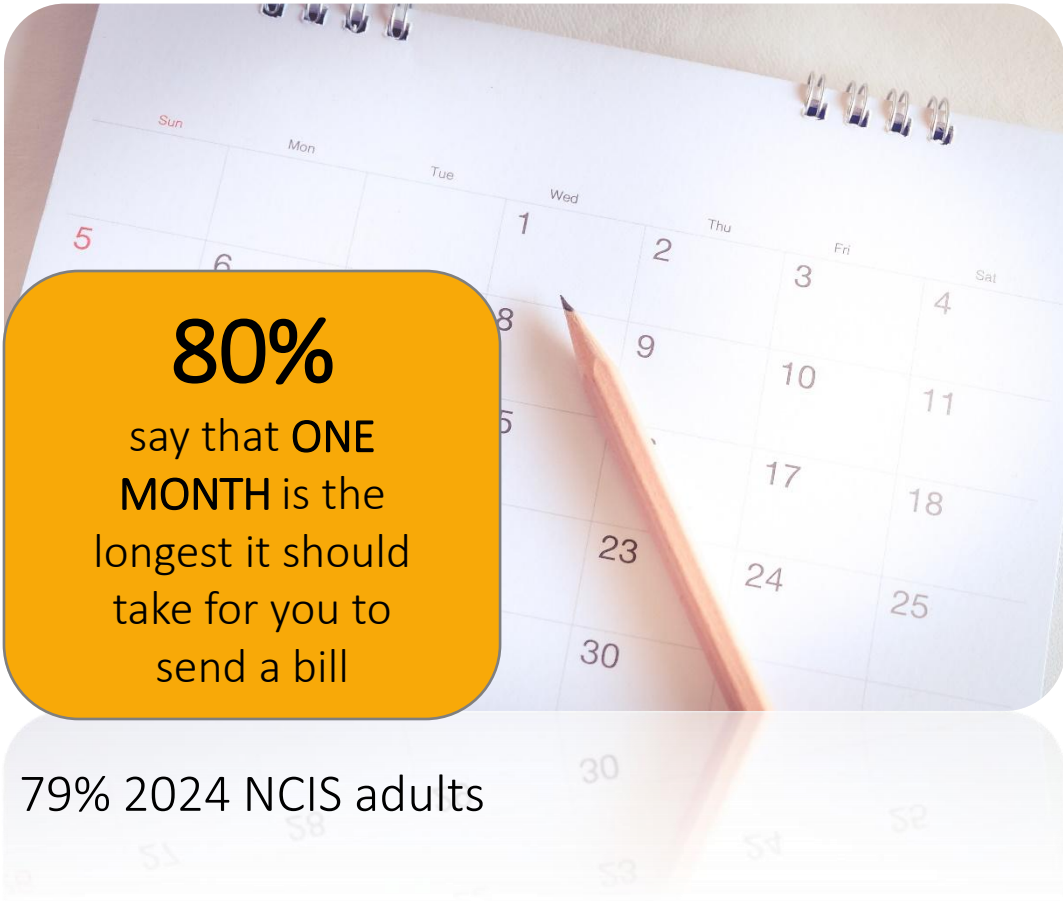
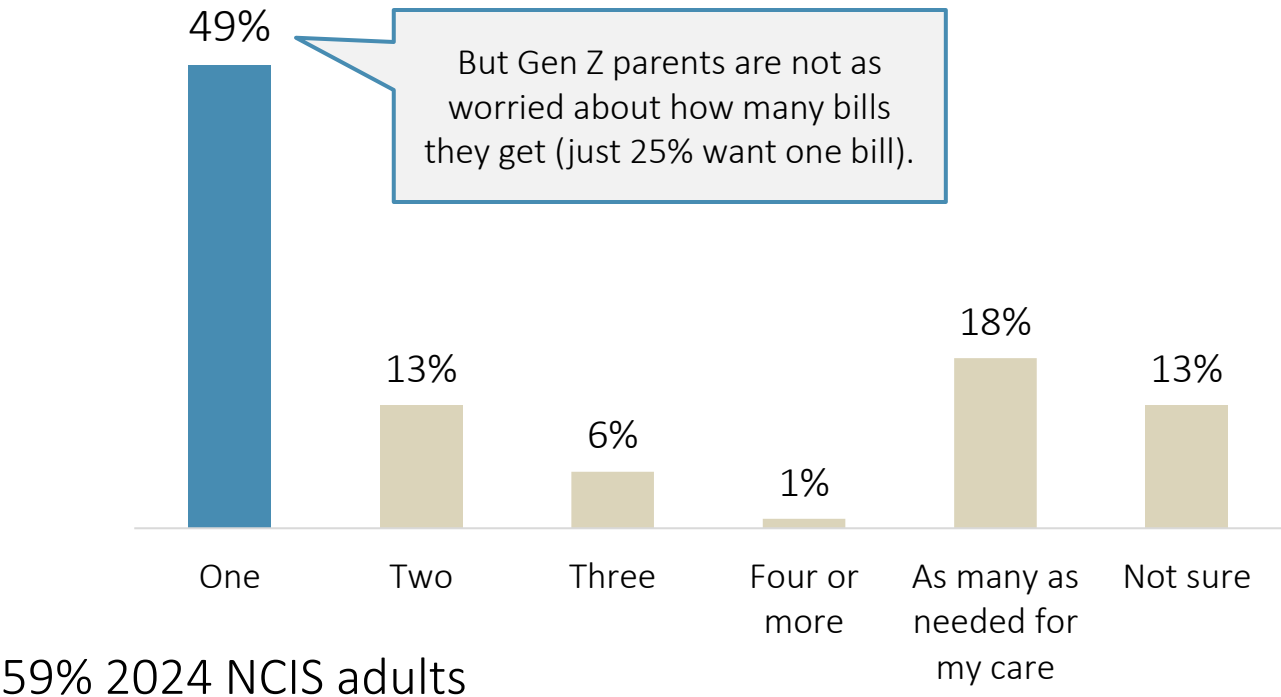
Satisfaction with Online Bill Paying via Provider Site



Q44 Do you prefer to pay your child's medical bills...? |  
Q45 Do you ever pay your child's healthcare bills online through your provider's website? (n=1,000)  
Q46 How would you rate your online healthcare bill paying experiences overall when paying a bill for your child's care? (n=531)  
Note: National comparisons are from Klein & Partners’ 2024 NCIS report findings for adult care.

‘I want one bill because I am tired of being your accounting department and if I don’t get that bill within one month of my child’s service, I should not have to pay it!’\*

Acceptable Number of Bills to Receive for Child’s Care



Q47 How many different bills for the same healthcare experience for your child would you prefer to get?  
Q48 And what is the maximum acceptable amount of time after your child's healthcare experience to wait for a bill (assuming you had a balance due)? (n=1,000)  
\*Quote from a focus group participant from another study on the topic of billing.



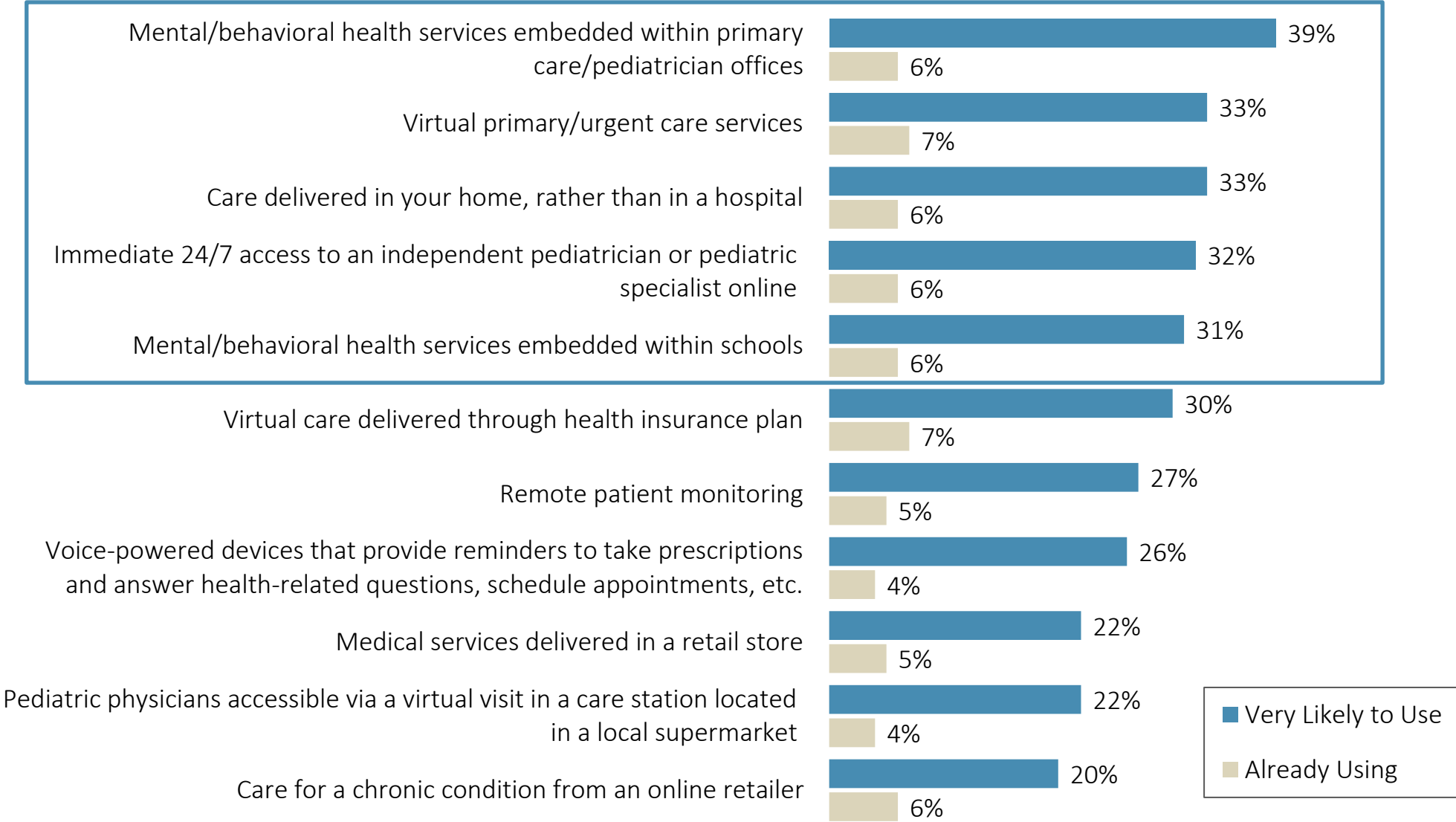
## PEDIATRIC DISRUPTERS

*“Disruption happens when an industry gets complacent. Too much innovation is happening to us not by us.”*

*--Rob Klein*

Notice how two of the top-5 ‘new’ healthcare services are related to mental health; the other three are access-related; the strong interest coupled with low current usage indicates a need yet to be filled for many parents → Leaders Innovate!

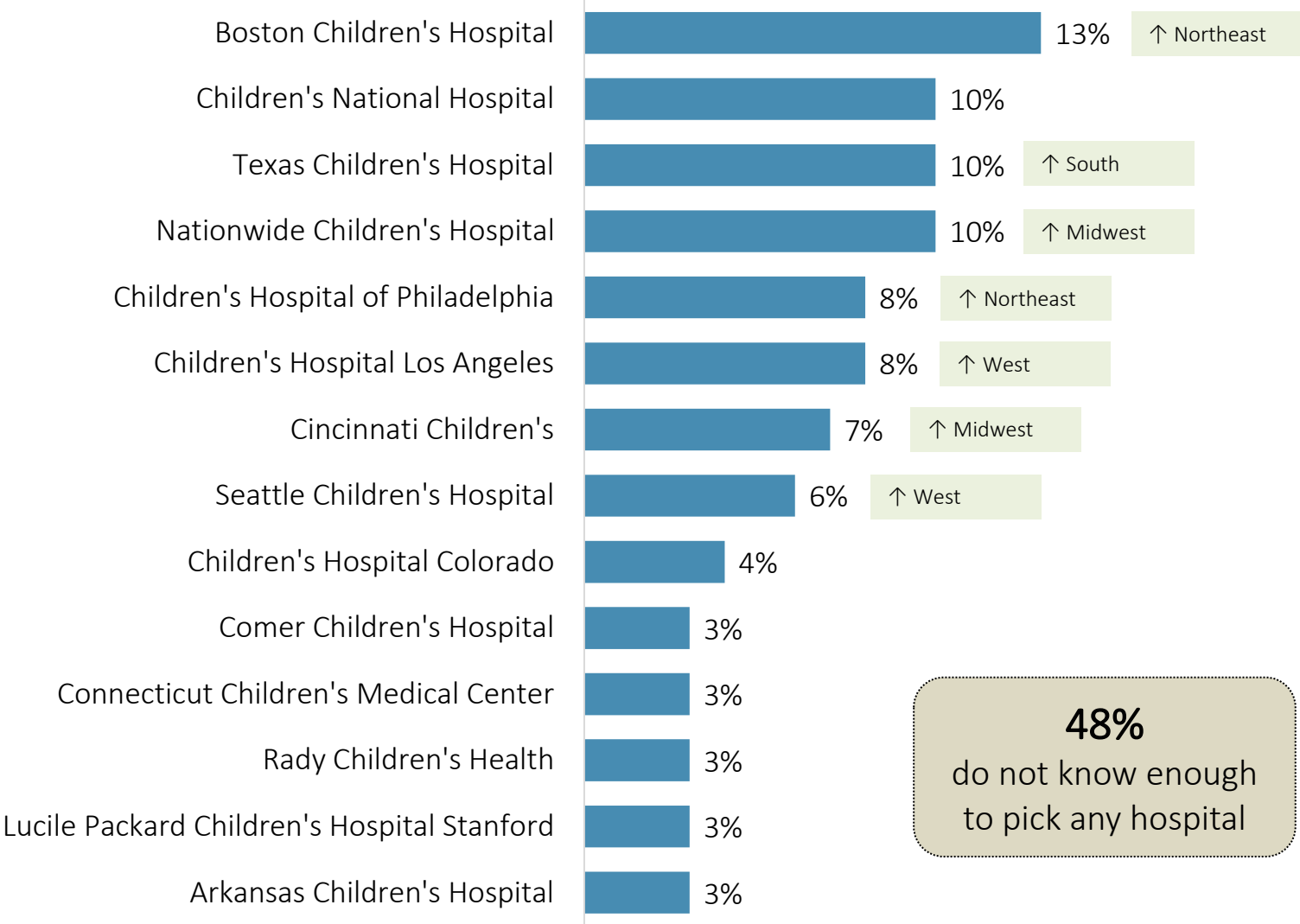
Likelihood of Using New Healthcare Services

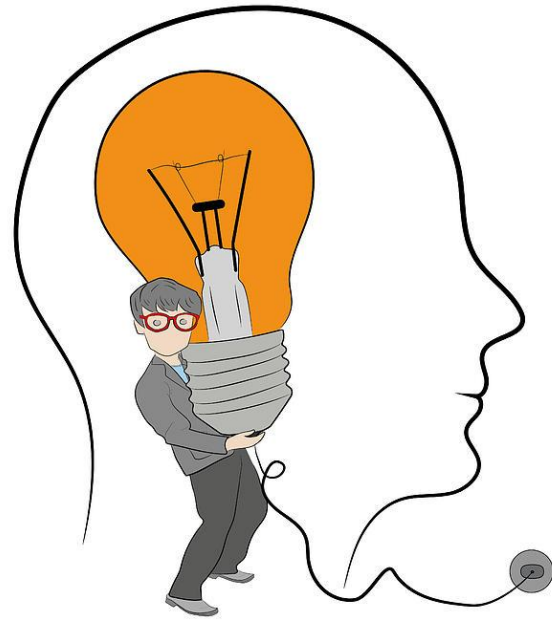




## NATIONAL CHILDREN'S HOSPITAL PERCEPTIONS

Children’s Hospitals Nationally Recognized for Clinical Excellence





# TOP TAKE-AWAYS

### 1) 100% Kid-Focused = 100% Parent Loyalty

- Hospital choice and loyalty are driven by 100% focus on children. If you're an independent children's health system, own your 100% focus on children. Our own research has shown this as the #1 message that gives parents the best reason to choose us.

### 2) Trust Is Our Superpower

- Importance of trust cannot be overstated. Children's hospitals enjoy higher levels of trust than adult health systems, including their social media content. This is consistent with what we see in our own engagement data as well as our brand campaign research findings.

### 3) AI's Not Just Smart – It's Memorable Too

- AI overviews are emerging as a player in ad recall, while we see shifts in media channels for most memorable advertising. Our research has consistently shown TV and radio deliver the highest level of ad recall, but search and social top the list nationally and are also top performers for us. SEO strategy will be key for the rise in zero-click search, AI search and AI overviews.

### 1) Trust and Partnership

- Parents are overwhelmed by an abundance of information and choices, leading to a decline in their trust in healthcare organizations. It's crucial for us to show up as diligent partners in addressing their needs and wants.

### 2) Impact of Referring Physicians

- Despite the plethora of information available, referring physicians continue to significantly influence parents' decisions on healthcare providers and facilities.

### 3) Digital Health as a Standard

- Digital health remains essential in managing children's healthcare. Virtual visits have transitioned from being a novel concept to a standard point of entry in healthcare services.

### 1) It Pays to Ask!

- Google ratings and reviews are hugely influential in consumer decision-making. Get a boost in your ratings volume – and an organic bump in your star ratings – by asking customers to rate your performance.

### 2) Healthcare With Heart

- Our research shows that parents greatly value compassion and making healthcare “easy.” Wise marketers partner with operations leaders to ensure the patient journey is as friction-free as possible.

### 3) Behavioral Healthcare on the Rise

- The need for pediatric mental health is large and growing exponentially. Behavioral health providers are a key source of information and access for families. A combination of virtual and primary care offerings can complement services at your main campus.

## Rob Klein's (Klein & Partners) Top Take-aways

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- 1) **The battle for market share growth will happen at the top of the sales funnel through routine care across physician, outpatient, and urgent care settings.**
  - Most parents report having healthy children so their healthcare utilization for their children happens more at the pediatrician's office, urgent care centers, and on virtual visits.
  - And pediatricians remain the strongest influence on pediatric specialist choice and hospital choice. If parents start outside your brand family, it makes it harder to get them into your brand family farther down the sales funnel.
- 2) **Invest in online reputation management over US News rankings.**
  - Online parent reviews carry a much greater weight in decision-making for parents than US News rankings. Parents want to know what other parents 'like them' have to say about your brand. Other Klein & Partners research supports the waning influence of US News rankings on decision-making.
- 3) **Authentic storytelling is the key for effective advertising.**
  - Parents say they are most likely to tune in and listen to pediatric advertising that shares real stories by real patients and/or parents.
- 4) **Urgent care often is 'Plan B' when the pediatrician can't see their child in a timely manner.**
  - One in five parents reportedly go to the ER when they can't get into their pediatrician. The ROI on an effective urgent care strategy is not just in creating loyalty and added revenue for the system, it can reduce the overcrowding in your ERs.
  - Parents are open to alternative solutions. Parents are open to seeing a NP or PA or even switching to a virtual visit (or going to that urgent care center) as long as you have well thought out alternatives and direction for them in advance of their need.
- 5) **An exceptional maternity experience can create strong lifetime customer value.**
  - The vast majority of moms who experience an exceptional maternity experience say they will choose a pediatrician who is connected to that hospital or system, take their child there for hospital care, and look to that hospital or system for adult care for themselves or their husband/partner in the future. Don't look at maternity as a siloed P&L service line; rather a loss-leader that you can cross-sell from over many years.

For more information or to request a  
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