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# Children's Hospital Industry Impact Report

Key findings from CHA's national surveys of parents/guardians of minor children and acute care children's hospitals

December 2023

# Methodology

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## Part I: Parent's Survey

- n=1,000 likely voters who are parents/guardians of children under 18 nationwide
- Balanced to U.S. voter demographics by gender, age, race, income, party, and region
- Conducted by LSG online September 18-26, 2023
- MOE: +/- 3%

## Part II: Children's Hospital Survey

- A survey of n=36 acute care children's hospitals nationwide
- Conducted by LSG online October 16-November 10, 2023



Industry Impact Report

# Part One: Parent's Survey

# Key Findings

- 1 Nearly all likely voters who are parents or caregivers of minor children believe that children's hospitals are **IMPORTANT** to meeting the health care needs of children in America.
- 2 Favorability and trust of children's hospitals **OUTPACES** general, adult-focused hospitals, and nearly all would seek treatment for their child at a children's hospital **FURTHER** away than a general one.
- 3 Most believe it is **IMPORTANT** that children's hospitals are fully staffed right now but recognize we do **NOT** have enough pediatricians/specialists to meet the health care needs of children.
- 4 A majority support **INCREASING** federal funding of children's hospitals graduate medical education (CHGME) and **INCREASING** Medicaid reimbursement at rates comparable to Medicare.
- 5 The overwhelming majority would be willing to take **ACTION** to preserve children's access to care at children's hospitals.



# Favorability of children's hospitals is HIGH across all audiences

How favorably or unfavorably do you feel about each of the following? (FAVORABLE)

	U.S.	DEM	SWING	GOP
<b>Children's hospitals</b>	<b>89%</b>	<b>91%</b>	<b>90%</b>	<b>85%</b>
Pediatricians	88%	90%	88%	86%
Pediatric nurses	86%	88%	84%	84%
General hospitals	75%	81%	70%	71%
Medicaid	69%	73%	66%	67%

COLUMN KEY:  
U.S.: n=1,000 U.S. likely voters with children under 18

DEM: n=410 Democratic likely voters with children under 18

SWING: n=288 swing likely voters with children under 18

GOP: n=302 Republican likely voters with children under 18



# Trust in children's hospitals is HIGH especially among Democratic voters

How much do you trust or distrust each of the following? (TRUST)

	U.S.	DEM	SWING	GOP
Pediatricians	88%	90%	88%	86%
<b>Children's hospitals</b>	<b>87%</b>	<b>92%</b>	<b>84%</b>	<b>83%</b>
Pediatric nurses	85%	88%	83%	85%
General hospitals	74%	80%	69%	71%



# Nearly all parents recognize children's hospitals are **IMPORTANT** in meeting children's health care needs

How important or unimportant are children's hospitals in meeting the health care needs of children in America?

	U.S.	DEM	SWING	GOP
<b>IMPORTANT (NET)</b>	<b>93%</b>	<b>95%</b>	<b>92%</b>	<b>90%</b>
NEITHER/I DON'T KNOW	4%	2%	5%	6%
UNIMPORTANT (NET)	4%	3%	3%	4%



# Nearly all across parties believe children's hospitals are essential in health care and should be adequately funded

How much do you agree or disagree with each of the following statements about children's hospitals? (AGREE)

	U.S.	DEM	SWING	GOP
They are essential to meeting the health care needs of children.	90%	93%	87%	87%
They provide high-quality care to children.	90%	91%	89%	88%
They provide advanced, specialized care to children with some of the most complex medical needs.	89%	90%	86%	89%
They provide comprehensive care to address the physical and emotional health care needs of children.	86%	86%	85%	86%
The federal government should ensure children's hospitals have the funding they need to treat pediatric patients.	89%	93%	86%	87%





## The vast majority believe children's hospitals play an important role in conducting medical research and training America's pediatricians

How much do you agree or disagree with each of the following statements about children's hospitals? (AGREE)

	U.S.	DEM	SWING	GOP
They conduct cutting-edge pediatric medical research and invest in advanced medical technologies.	85%	86%	83%	84%
They play an important role in educating and training the nation's pediatricians.	81%	84%	77%	79%



## The vast majority believe children's hospitals are doing their part to engage children, parents, and communities and address key issues

How much do you agree or disagree with each of the following statements about children's hospitals? (AGREE)

	U.S.	DEM	SWING	GOP
They care about the pediatric patients they serve.	87%	90%	86%	85%
They engage with parents, caregivers, and families to help them make medically-informed decisions for their children.	87%	90%	83%	85%
They support the communities they serve.	81%	83%	79%	79%
They provide access to care for all children who need it, regardless of their circumstances or ability to pay.	79%	81%	74%	79%
They are doing their part to address youth mental health challenges.	73%	75%	70%	71%



# Nearly all would seek treatment at a children's hospital FURTHER away than a closer general, adult-focused hospital

If you had a child in need of medical treatment, how likely or unlikely would you be to consider seeking treatment for them at a children's hospital that is a bit further away over the nearest general hospital?

	U.S.	DEM	SWING	GOP
<b>LIKELY (NET)</b>	<b>92%</b>	<b>94%</b>	<b>91%</b>	<b>90%</b>
NEITHER/I DON'T KNOW	6%	4%	6%	8%
UNLIKELY (NET)	3%	3%	3%	2%



# The vast majority are willing to take ACTION to preserve access to care at children's hospitals

Which of the following actions, if any, would you be willing to take to preserve children's access to care at children's hospitals?

	U.S.	DEM	SWING	GOP
<b>Talk to friends and family</b>	<b>72%</b>	<b>74%</b>	<b>72%</b>	<b>69%</b>
<b>Sign a petition</b>	<b>67%</b>	<b>67%</b>	<b>71%</b>	<b>64%</b>
<b>Post on social media</b>	<b>56%</b>	<b>59%</b>	<b>53%</b>	<b>52%</b>
<b>Contact a lawmaker</b>	<b>41%</b>	<b>45%</b>	<b>39%</b>	<b>39%</b>
I would not be willing to take any action	6%	6%	4%	8%



# The vast majority believe Medicaid reimbursement for children's services should be the **SAME** or **MORE** than Medicare

Do you believe that a physician treating a child enrolled in Medicaid should be reimbursed more, less, or the same as what is reimbursed for treating a senior enrolled in Medicare for a comparable service?

	U.S.	DEM	SWING	GOP
<b>MORE (NET)</b>	<b>35%</b>	<b>40%</b>	<b>36%</b>	<b>29%</b>
<b>THE SAME</b>	<b>58%</b>	<b>54%</b>	<b>55%</b>	<b>64%</b>
LESS (NET)	3%	2%	5%	3%
Don't know	4%	4%	4%	3%



# Most across parties support **INCREASING** Medicaid reimbursement rates to Medicare levels

Medicaid is the state and federal health insurance program for lower income Americans and children, and Medicare is the federal insurance program for seniors. Do you support or oppose a new law that would increase reimbursement rates for doctors, hospitals and other health care providers who care for Medicaid patients to rates comparable to those paid by Medicare?

	U.S.	DEM	SWING	GOP
<b>SUPPORT (NET)</b>	<b>69%</b>	<b>77%</b>	<b>65%</b>	<b>64%</b>
NEITHER/I DON'T KNOW	22%	16%	27%	26%
<b>OPPOSE (NET)</b>	<b>9%</b>	<b>7%</b>	<b>9%</b>	<b>10%</b>



# Most across parties support **INCREASING** CHGME funding

Graduate medical education is the training that doctors receive after graduating from medical school such as an internship, residency, or fellowship at a hospital in order to gain state licensure and board certification to practice medicine. Based on what you know, should we increase or decrease the federal government's funding of children's hospitals graduate medical education that is used to train the nation's pediatricians?

	U.S.	DEM	SWING	GOP
<b>INCREASE (NET)</b>	<b>69%</b>	<b>74%</b>	<b>67%</b>	<b>64%</b>
NEITHER/I DON'T KNOW	26%	21%	27%	33%
DECREASE (NET)	4%	4%	6%	4%



# Nearly all believe it's IMPORTANT that children's hospitals are fully staffed, and most do not believe we have enough pediatricians

How important is it to you that children's hospitals are fully staffed with pediatricians, pediatric specialists, and pediatric nurses right now?

	U.S.	DEM	SWING	GOP
<b>IMPORTANT (NET)</b>	<b>92%</b>	<b>95%</b>	<b>90%</b>	<b>91%</b>
NEITHER/I DON'T KNOW	6%	3%	7%	8%
UNIMPORTANT (NET)	2%	1%	3%	2%

Which of the following statements comes closer to your view about the number of pediatricians and pediatric specialists, doctors who specialize in caring for children, in the United States?

	U.S.	DEM	SWING	GOP
<b>We do not have enough pediatricians and pediatric specialists to meet the health care needs of children.</b>	<b>68%</b>	<b>65%</b>	<b>76%</b>	<b>65%</b>
We have enough pediatricians and pediatric specialists to meet the health care needs of children.	32%	35%	24%	35%





# The vast majority are CONCERNED about national and state pediatrician and pediatric nurse shortages

How concerned or unconcerned are you with each of the following trends in medicine? (CONCERNED)

	U.S.	DEM	SWING	GOP
National pediatrician shortage	79%	82%	79%	75%
National pediatric nursing shortage	79%	81%	81%	75%
Pediatric nursing shortage in your state	76%	77%	76%	75%
Pediatrician shortage in your state	75%	77%	77%	72%



# Most across parties SUPPORT policies that would strengthen the pediatric workforce

Do you support or oppose the following proposals to potentially help strengthen the pediatric workforce? (SUPPORT)

	U.S.	DEM	SWING	GOP
<b><u>Address pediatric mental health workforce shortages.</u></b> Congress should establish grants, scholarships, and targeted funding to invest in pediatric mental health training to grow the pediatric mental health workforce and retraining of the current workforce.	82%	85%	82%	79%
<b><u>Share best practices.</u></b> Congress should require all federal agencies involved in health care workforce development to share emerging and promising practices for recruiting and retaining pediatric health care professionals, across all levels of government.	81%	85%	80%	77%
<b><u>Support for provider well-being.</u></b> Congress should strengthen efforts to support pediatric health care provider well-being to prevent burnout and turnover by expanding training opportunities for non-licensed providers.	80%	84%	77%	77%
<b><u>Incentivize people to pursue pediatric careers.</u></b> Congress should expand existing and develop new programs to support the pediatric health care workforce early career pipeline, such as loan forgiveness, grants, scholarships, career academies, higher education partnerships, and other professional training and education programs.	79%	85%	74%	77%
<b><u>Reauthorize and boost funding for CHGME.</u></b> Congress should reauthorize the Children's Hospitals Graduate Medical Education (CHGME) program, which is set to expire in September 2023, that provides training for the nation's pediatricians and pediatric specialists.	77%	82%	76%	72%





Industry Impact Report

# Part Two: Acute Care Children's Hospital Survey

# Key Findings

- 1 The lack of **mental health resources** for children is a top concern for acute care children's hospitals, and most have seen an **INCREASE** in pediatric patients requiring mental health care.
- 2 A majority of acute care children's hospitals treat **10,000+ patients** a year for urgent care and immunizations as well as **5,000+ patients** a year for mental health and major surgeries.
- 3 More than three fourths are **ACTIVE** in their community, addressing children's social barriers that impact health such as mental health, nutrition and exercise, food insecurity, and gun violence.
- 4 Three fourths or more are conducting **original research or clinical trials** in cancer and neonatal medicine, and the overwhelming majority are sharing their findings with the public and private sectors.
- 5 All are **PARTNERING** with other hospitals in their region to provide pediatric care, and the vast majority believe government funding of hospital partnerships is **INADEQUATE**.



# Profiling Acute Care Children's Hospitals

**9,000 inpatient admissions** on average in an acute care children's hospital per year

**385,000 outpatient visits** on average in an acute care children's hospital per year

**250 staffed beds** on average in an acute care children's hospital

**60%** of inpatient days on average are funded by Medicaid

**74%** have been awarded a Magnet Designation acknowledging excellence in nursing

**100 paid residents or full-time fellows** on average in an acute care children's hospital



# Acute care children's hospitals are most CONCERNED with high labor costs and lack of mental health resources

Which of the following challenges facing children's hospitals are MOST concerning to you? (COMBINED CHOICE – TOP TWO)

	U.S.
<b>High labor costs</b>	<b>78%</b>
<b>Lack of mental health resources for children</b>	<b>58%</b>
National shortage of pediatric health professionals	47%
Gap in funding for graduate medical education	14%
Lack of medical equipment designated for children	3%



# Most provide financial assistance for formal education and training programs for pediatricians

Does your hospital provide financial assistance for formal education and training programs for pediatricians or other pediatric specialists like residencies?

	U.S.
<b>YES</b>	<b>75%</b>
NO	19%
I DON'T KNOW	6%



# The vast majority treat 10,000+ patients a year for urgent care cases and immunizations

For each of the following services or cases, how many pediatric patients, both inpatient or outpatient, did your hospital treat last year?

	Less than 10,000	10,000+
Urgent care cases	20%	<b>79%</b>
Immunizations	25%	<b>62%</b>





# Most treat 5,000+ patients a year for mental health and major surgeries and provide telehealth

For each of the following services or cases, how many pediatric patients, both inpatient or outpatient, did your hospital treat last year?

	Less than 5,000	5,000+
Telehealth	28%	<b>68%</b>
Mental and behavioral health	43%	<b>54%</b>
Major surgeries	47%	<b>53%</b>



# A majority treat 3,000+ patients a year for asthma and heart disease

For each of the following, how many pediatric patients, both inpatient or outpatient, did your hospital treat last year?

	Less than 3,000	3,000+
Asthma	40%	<b>56%</b>
Heart disease	45%	<b>51%</b>



# A majority treat 1,000+ patients a year for neonatal, chronic conditions, special needs, and autism

For each of the following, how many pediatric patients, both inpatient or outpatient, did your hospital treat last year?

	Less than 1,000	1,000+
Neonatal	22%	<b>78%</b>
Diabetes	22%	<b>73%</b>
Special needs	25%	<b>63%</b>
Cancer	41%	<b>59%</b>
Autism	36%	<b>57%</b>
Obesity	36%	<b>54%</b>



# An overwhelming majority have seen an **INCREASE** in pediatric patients requiring mental health care

Over the past three years, have the number of patients under 18 years old requiring mental health care at your hospital increased or decreased?

	U.S.
<b>INCREASED (NET)</b>	<b>94%</b>
NEITHER/I DON'T KNOW	3%
DECREASED (NET)	3%



# An overwhelming majority **AGREE** that children's hospitals are designed differently than adult-focused, general hospitals

Do you agree or disagree with the following statement: Children's hospitals are designed differently than adult-focused, general hospitals in order to meet the specific needs of children and teens?

	U.S.
<b>AGREE (NET)</b>	<b>94%</b>
NEITHER	0%
DISAGREE (NET)	6%



# A majority are ACTIVE in the community addressing social barriers that impact children's health

How active would you say your children's hospital is in addressing the following patient and community issues? (ACTIVE)

	U.S.
Children's mental health	97%
Health equity and addressing social determinants of health	97%
Patient financial assistance	94%
Children's nutrition and exercise	94%
Child abuse and violence against children	94%
Food insecurity	89%
Gun violence	83%
Poverty/homelessness	69%



## A majority are ACTIVE in providing preventive care, training providers, and addressing learning disorders

How active would you say your children's hospital is in addressing the following patient and community issues? (ACTIVE)

	U.S.
Preventive care	97%
Providing pediatric care training and support to other local care providers	94%
Children's learning disorders	89%



# More than TWO THIRDS are conducting research or clinical trials in cancer, neonatal, neurology, pulmonology, and endocrinology

In which of the following areas of children's health has your hospital conducted original research or facilitated clinical trials? (SELECT ALL THAT APPLY)

RESEARCH AREAS	U.S.
Cancer	83%
Neonatal medicine	75%
Neurology/neurosciences	72%
Pulmonary medicine	67%
Endocrinology	67%





# A MAJORITY are conducting original research or clinical trials across key children's health areas

In which of the following areas of children's health has your hospital conducted original research or facilitated clinical trials? (SELECT ALL THAT APPLY)

RESEARCH AREAS	U.S.
Kidney diseases	64%
Pediatric surgery	64%
Gastroenterology	64%
Pediatric trauma	64%
Heart diseases	61%
Orthopedics	61%
Mental and behavioral health	58%
Sickle cell anemia	58%
Gene therapy	56%
Immunology	56%
Rheumatology	56%



# Most acute care hospitals conducting original research are **SHARING** their findings across the public and private sectors

Has your hospital shared the results of any original research or clinical trials externally with other children's hospitals, industry stakeholders, or government agencies?

	U.S.
<b>YES</b>	<b>93%</b>
NO	0%
I DON'T KNOW	7%



# ALL are partnering with other hospitals in their region to provide pediatric care

How many partnerships do you have with other hospitals in the region you serve? Partnerships can be any relationships where you assist those hospitals in helping to provide pediatric care.

	U.S.
None	0%
<b>1-9</b>	<b>36%</b>
<b>10-19</b>	<b>39%</b>
<b>20-49</b>	<b>9%</b>
<b>50+</b>	<b>14%</b>



# Nearly ALL are partnering to coordinate care and advise on best practices

What types of partnerships or support do you provide to other hospitals in your region?

	U.S.
Coordinating care between your hospital and other hospitals	94%
Advising on best practices for caring for pediatric patients	94%



# Most are sending or funding staff to work in, train, and provide telehealth at other hospitals

What types of partnerships or support do you provide to other hospitals in your region?

	U.S.
Sending or funding pediatricians and pediatric nurses to work in other hospitals	69%
Funding telehealth services between your hospital and other hospitals	63%
Sending or funding pediatricians and pediatric nurses to train providers in other hospitals	57%



# The vast majority believe federal government funding of hospital partnerships is **INADEQUATE**

Do you believe federal government funding of hospital partnerships with other care providers and community organizations is adequate or inadequate?

	U.S.
ADEQUATE (NET)	9%
NEITHER/I DON'T KNOW	18%
<b>INADEQUATE (NET)</b>	<b>74%</b>





# Thank You

Questions?

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