



Children's Hospitals Landscape Report

Q4-2024

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About Children's Hospital Association

Children's Hospital Association convenes clinical and administrative leaders from more than 200 children's hospitals and health systems to create meaningful change in child health. Through collaboration, improvement initiatives, and advocacy, we address issues facing children's hospitals and the communities they serve.

Learn more: [About Children's Hospital Association \(childrenshospitals.org\)](https://childrenshospitals.org)

Media inquiries?

[Elleni Almandrez](#), Vice President of External Affairs

About The Data

The Children's Hospitals Landscape Report reflects the national experience for high-level financial, patient utilization, and workforce measures. Key metrics were obtained from 50 U.S. children's hospitals through CHA's Pediatric Health Information System (PHIS®) databases.

Averages are based on quarterly performance using the middle 80% of participants. The top 10% and bottom 10% of hospitals were excluded. Quarterly averages are aggregated into the specific time intervals used for comparison in the report.

- PHIS is a comparative database with clinical and resource utilization data collected monthly for inpatient and observation cases, ambulatory surgery cases, and emergency department visits.
- [Report data definitions.](#)

KEY VOLUMES

INPATIENT DISCHARGES

INPATIENT CASE MIX INDEX

INPATIENT AND OBSERVATION CASES

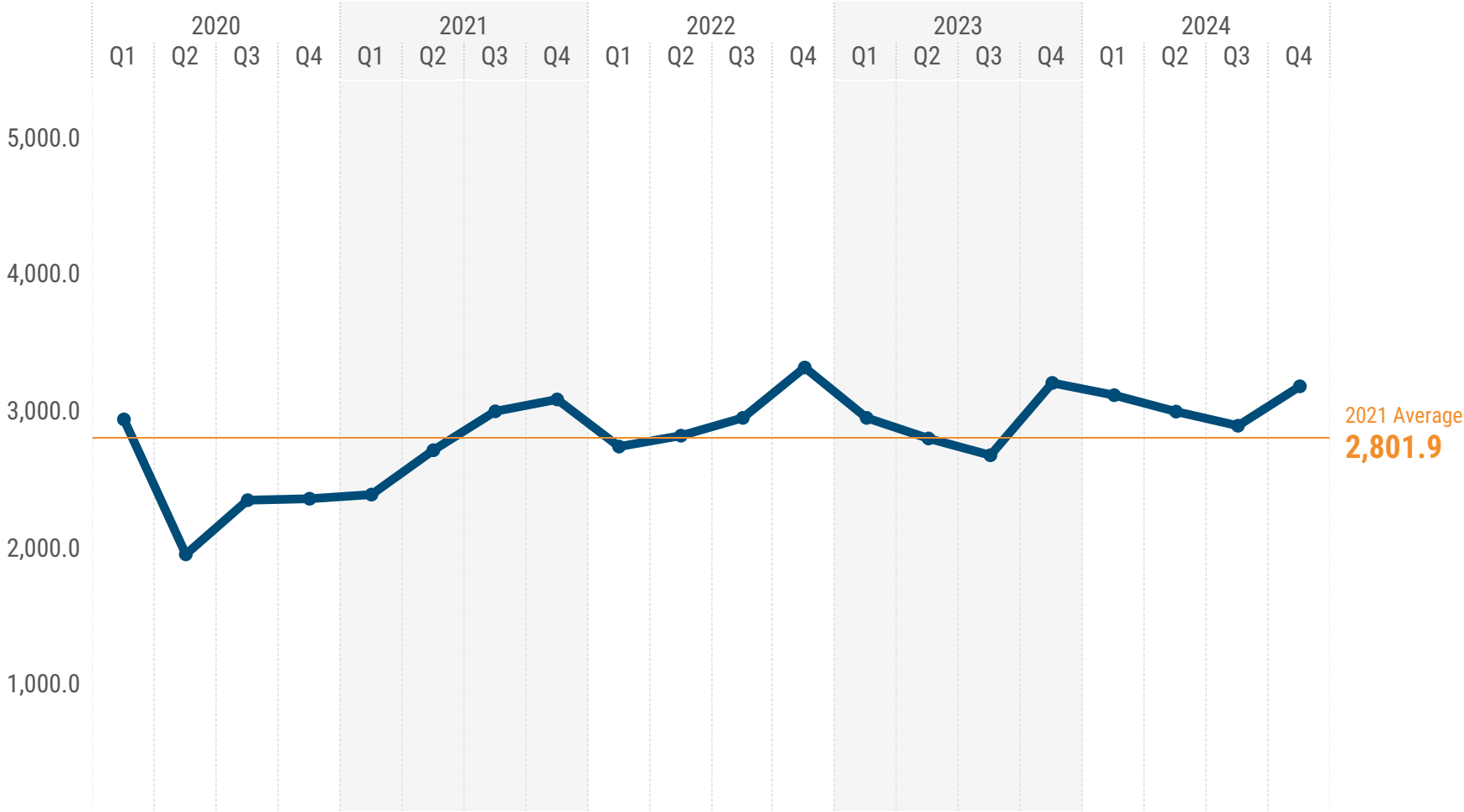
SURGERY CASES

EMERGENCY VISITS

For the last two years, inpatient discharges have followed a similar quarterly pattern with high volumes and lower severity in Q1/Q4, however 2024 had higher volumes versus 2023 by 4.7%.



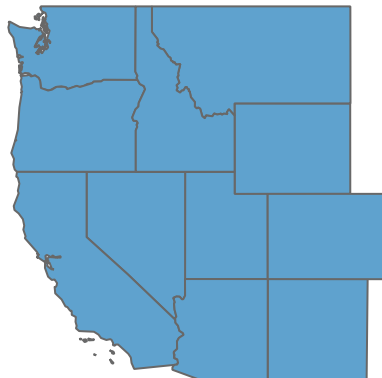
Inpatient Discharges



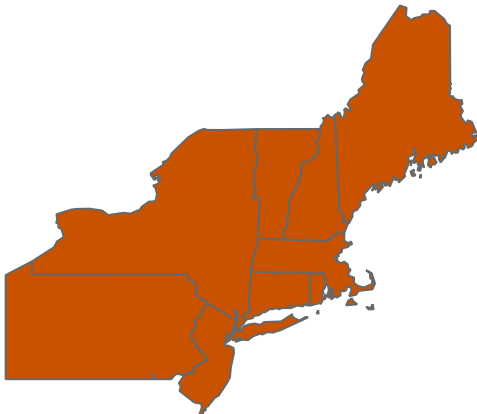
Q4-24 vs. Q3-24	9.9%
L12M vs. P12M	4.7%
L12M vs. 2021	8.9%

Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)

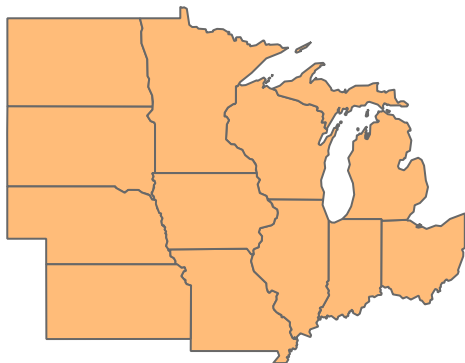
Across all regions and time periods, the inpatient discharge growth rate was positive. The West had the highest growth rates in the last year and since 2021.



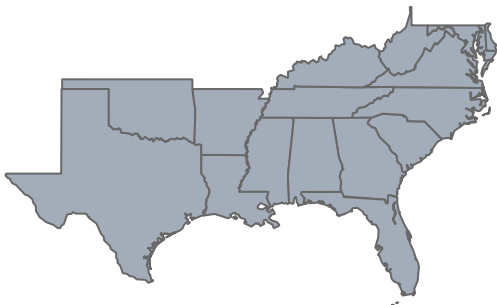
WEST Percent Change		
Q4-24 vs. Q3-24	7.8%	
L12M vs. P12M	7.4%	
L12M vs. 2021	17.7%	



NORTHEAST Percent Change		
Q4-24 vs. Q3-24	11.6%	
L12M vs. P12M	2.5%	
L12M vs. 2021	0.1%	



MIDWEST Percent Change		
Q4-24 vs. Q3-24	1.3%	
L12M vs. P12M	2.2%	
L12M vs. 2021	13.5%	



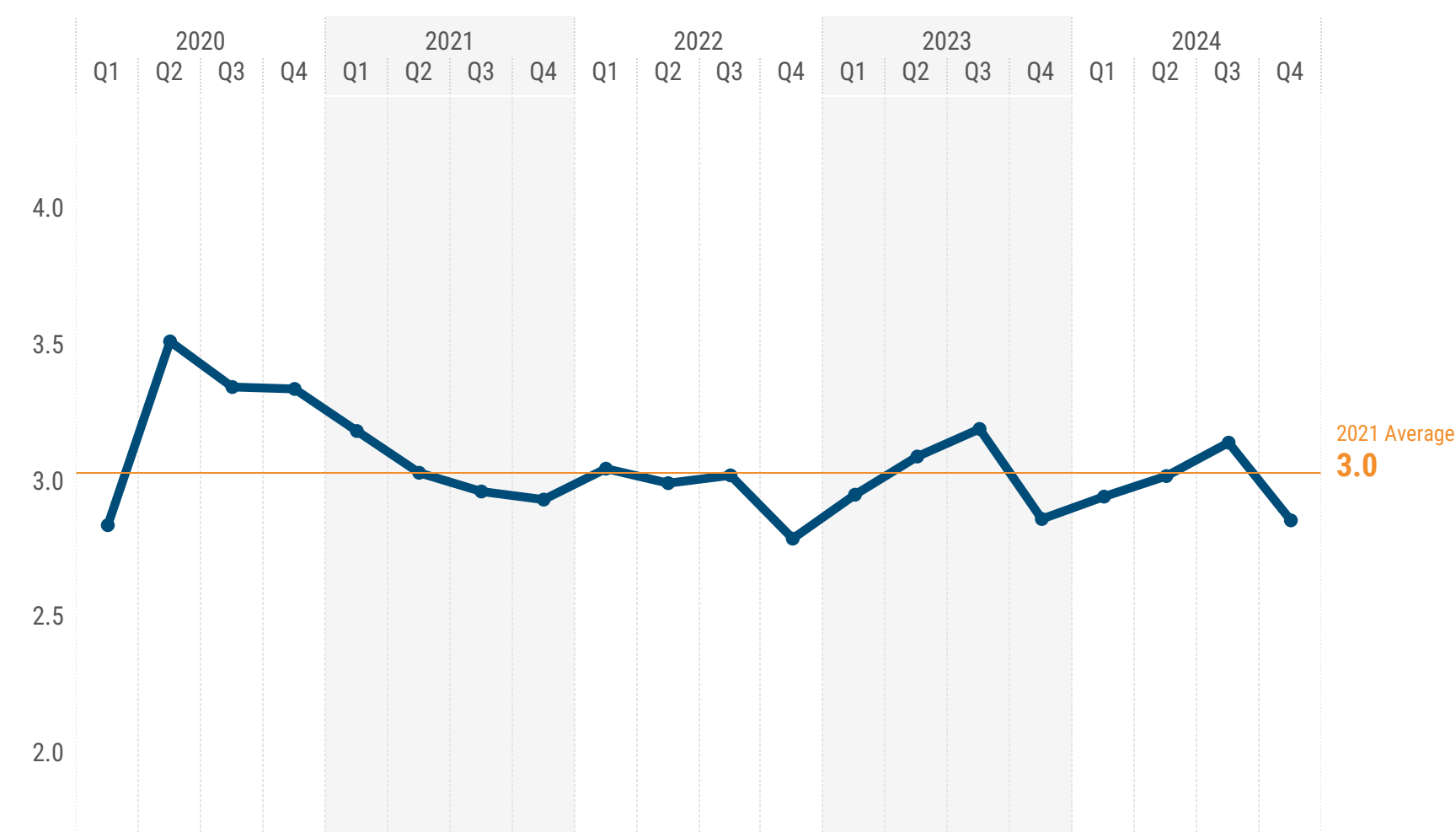
SOUTH Percent Change		
Q4-24 vs. Q3-24	22.1%	
L12M vs. P12M	6.6%	
L12M vs. 2021	2.4%	

Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)

Over the last two years, patient severity trends have followed a similar pattern with Q1 and Q4 having the lowest severity. This is related to seeing a higher volume of low severity patients.



Inpatient Case Mix Index (Patient Severity)



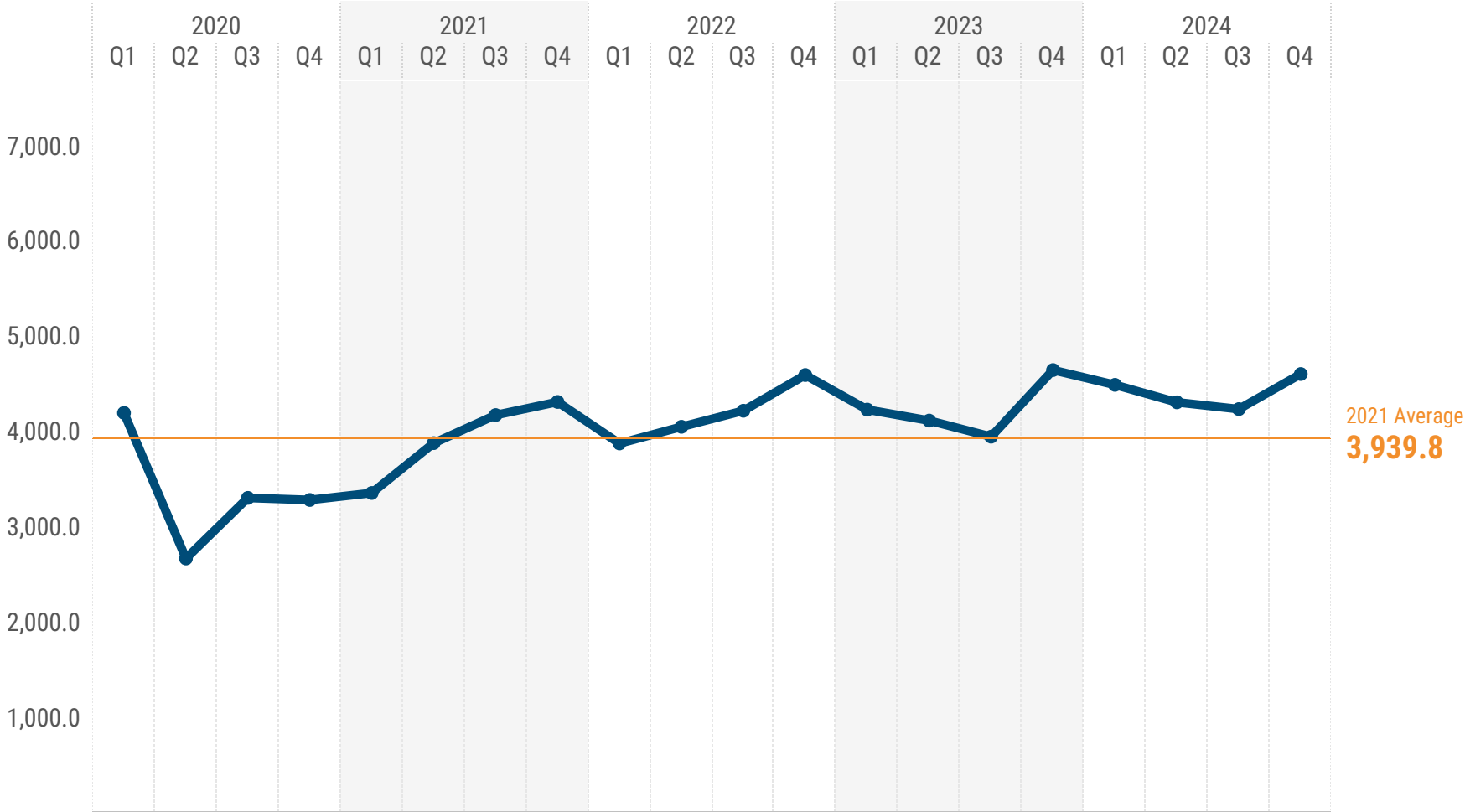
Q4-24 vs. Q3-24	-9.1%	
L12M vs. P12M	-0.9%	
L12M vs. 2021	-1.1%	

Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)

In 2024, inpatient and observation cases grew more than 4% compared to 2023 and more than 12% compared to 2021.



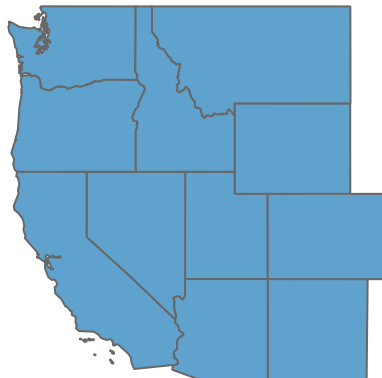
Total Inpatient and Observation Cases



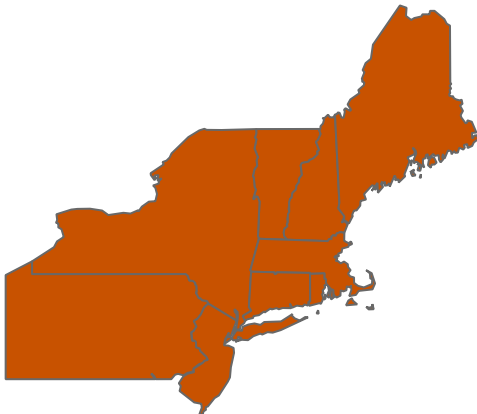
Q4-24 vs. Q3-24	8.7%
L12M vs. P12M	4.1%
L12M vs. 2021	12.2%

Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)

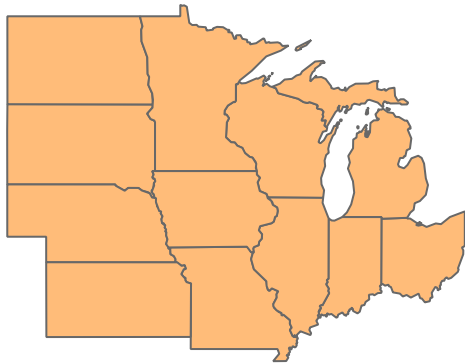
Across all regions and time periods, the inpatient and observation cases growth rate was positive, except for the South.



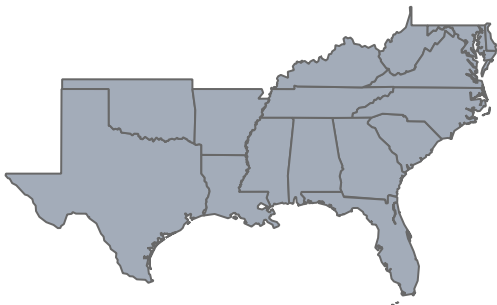
WEST Percent Change		
Q4-24 vs. Q3-24	9.3%	
L12M vs. P12M	6.3%	
L12M vs. 2021	15.1%	



NORTHEAST Percent Change		
Q4-24 vs. Q3-24	9.3%	
L12M vs. P12M	2.7%	
L12M vs. 2021	11.4%	



MIDWEST Percent Change		
Q4-24 vs. Q3-24	19.9%	
L12M vs. P12M	8.7%	
L12M vs. 2021	21.0%	



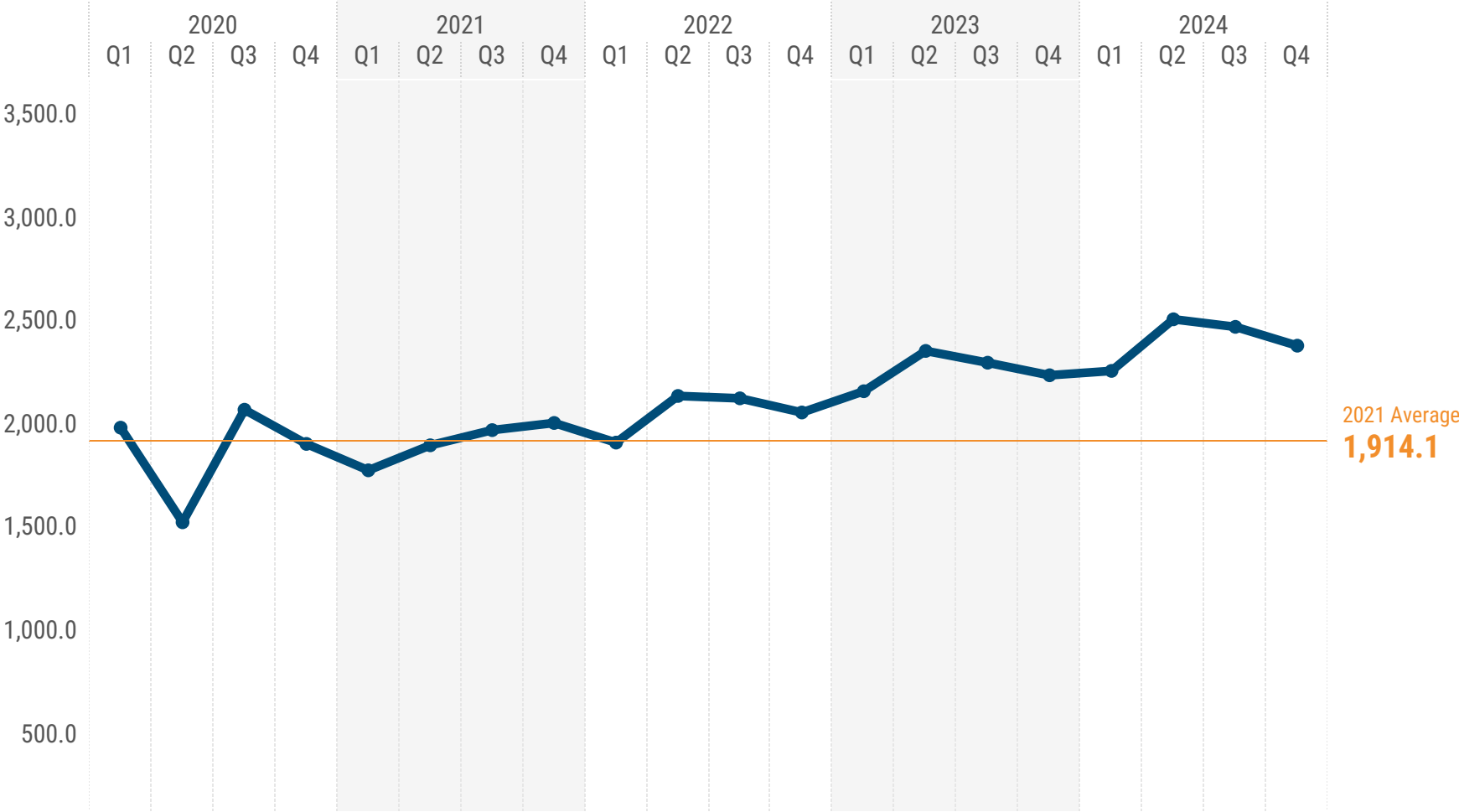
SOUTH Percent Change		
Q4-24 vs. Q3-24	-4.6%	
L12M vs. P12M	-1.7%	
L12M vs. 2021	1.9%	

Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)

Surgery cases continued to increase in 2024. The most recent growth rate was 6.3% compared to 2023 and 25.7% compared to 2021.



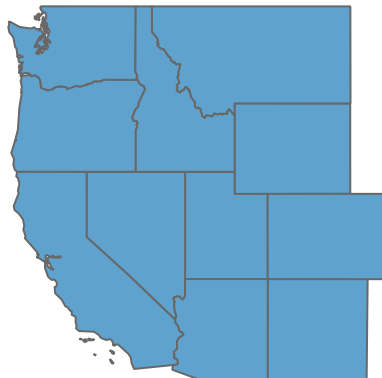
Surgery Cases



Q4-24 vs. Q3-24	-3.7%
L12M vs. P12M	6.3%
L12M vs. 2021	25.7%

Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)

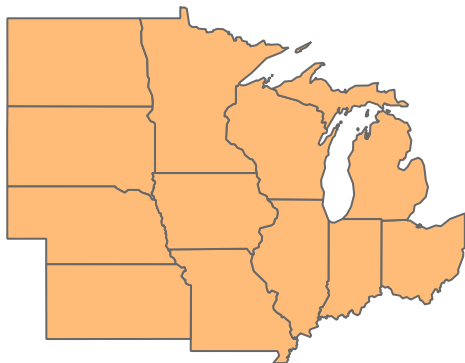
The surgical growth rate was mixed between regions. The Northeast had the highest growth rate in 2024 compared to both 2023 and 2021.



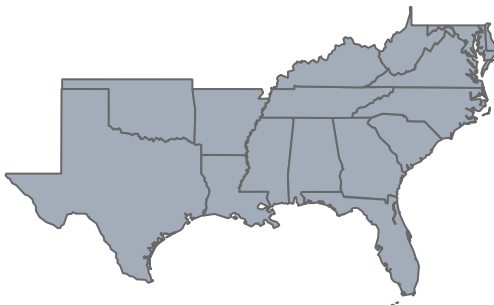
WEST Percent Change	
Q4-24 vs. Q3-24	-5.0%
L12M vs. P12M	10.5%
L12M vs. 2021	19.3%



NORTHEAST Percent Change	
Q4-24 vs. Q3-24	-8.9%
L12M vs. P12M	15.7%
L12M vs. 2021	46.7%



MIDWEST Percent Change	
Q4-24 vs. Q3-24	-2.0%
L12M vs. P12M	0.2%
L12M vs. 2021	24.3%



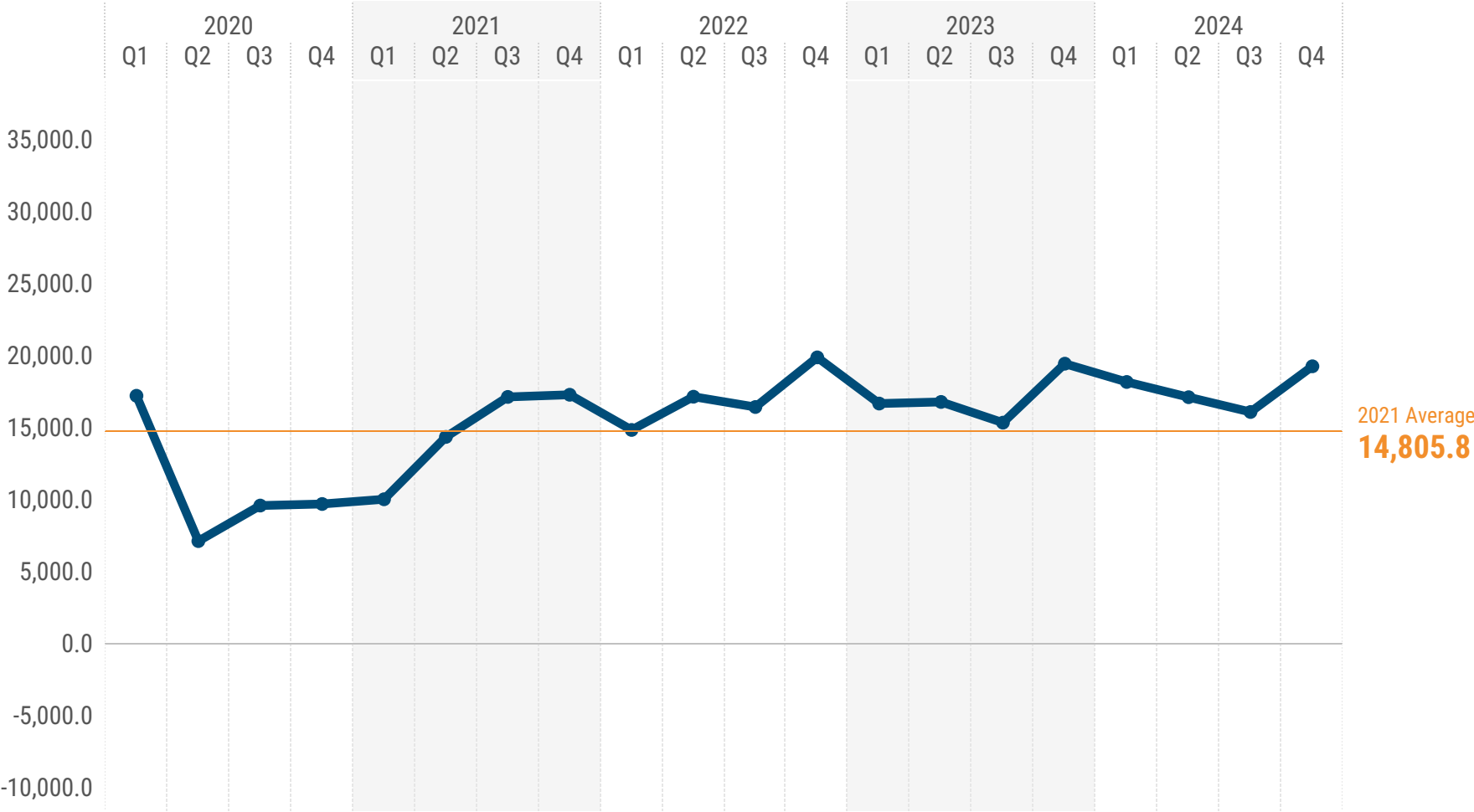
SOUTH Percent Change	
Q4-24 vs. Q3-24	-4.0%
L12M vs. P12M	6.0%
L12M vs. 2021	25.2%

Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)

Emergency department visits have increased from the low in 2020 and outpaced 2023 by 3.5%. In 2024, the expected quarterly pattern of ED visits returned with high volumes in Q1 and Q4.



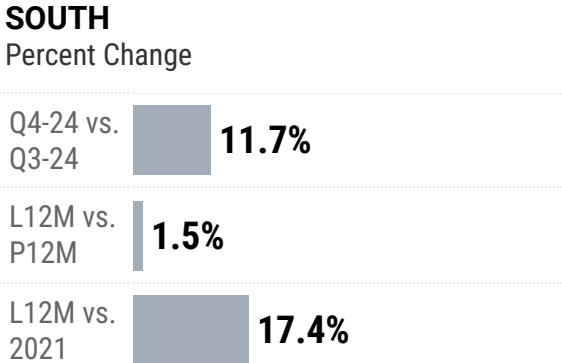
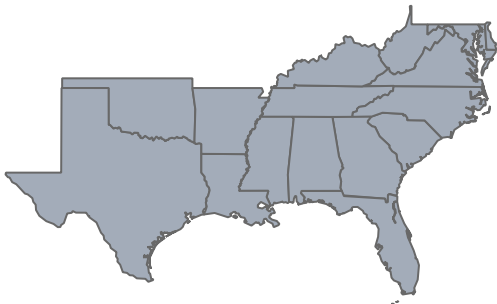
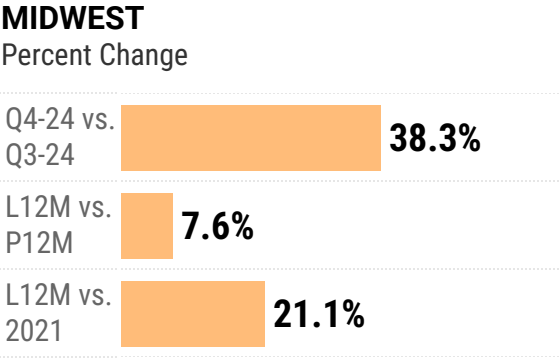
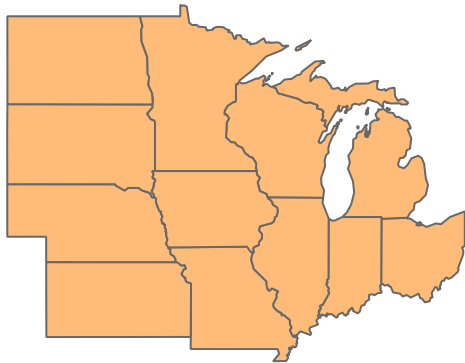
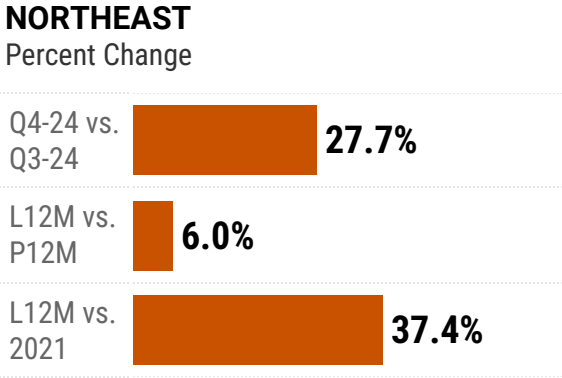
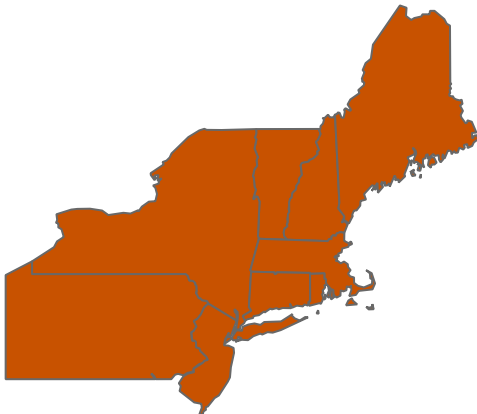
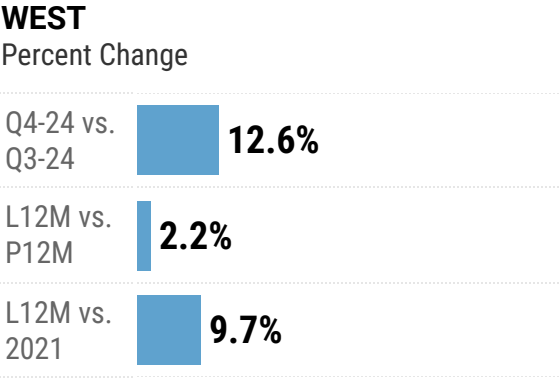
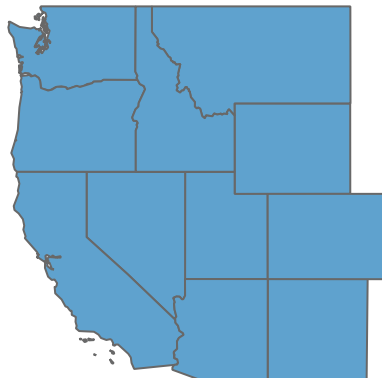
Emergency Department Visits



Q4-24 vs. Q3-24	19.6%
L12M vs. P12M	3.5%
L12M vs. 2021	20.0%

Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)

Emergency department visits have increased in all regions and time periods with the Northeast and Midwest having the highest growth rates.



Q4-24 vs. Q3-24 | (10/01/24 - 12/31/24) vs. (07/01/24 - 09/30/24)
L12M vs. P12M | (01/01/24 - 12/31/24) vs. (01/01/23 - 12/31/23)
L12M vs. 2021 | (01/01/24 - 12/31/24) vs. (01/01/21 - 12/31/21)



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