

A FEW TECHNICAL POINTS

- All lines are muted throughout the webinar
- Engage using the chat
 - Select CHAT and then “all participants and attendees”
- Use the Q/A for to submit your questions
- This webinar will be recorded; We will send you the slides, recording, & resources in the coming days.



CONFIDENCE IN CARE: UNDERSTANDING PUBLIC TRUST IN CHILDREN'S HOSPITALS

December 4, 2025

AGENDA

- Introduction

- Overview survey findings

- Discussion of impacts & opportunities

- Next steps for members



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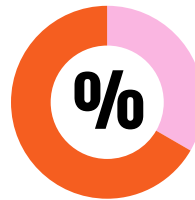
Mitch Harris

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Convening

Through our Community Health Affinity Group, we bring together colleagues focused on how hospitals work outside their walls in the geographic communities they serve.



Tracking

Our team looks at how children's hospital community benefit numbers compare to the industry as a whole and offers best practice tips.



Collaborating

We partner with allied organizations and industry leaders to advocate, share resources, and better understand the field.



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CHILDREN'S HOSPITAL ASSOCIATION WEBINAR

Confidence in Care: Understanding Public Trust in Children's Hospitals

December 4, 2025



We're part of the Chartis Family.

Healthcare challenges are not siloed. *Neither are we.*

Chartis has six practices
that together craft singular
solutions.



About Jarrard and Chartis

TOP 10

Healthcare
Communications
Firm

Served
Over Half
of the Best Hospitals
Honor Roll
*US News & World
Report*

Serve All

of the Best
Children's Hospital
Honor Roll
*US News &
World Report*

Thought Leader

and Author of
Jarrard MRI *State
of Play National
Healthcare
Consumer Survey
2020 - 2025*

Jarrard Market Research & Insights (MRI)

20+

years of healthcare
experience including:

- **2025 Community Benefit** (U.S. adult public): Drivers of support for tax-exempt status
- **2024 Access and Strategic Positioning** (U.S. adult public): Drivers of provider choice and views on quality.
- **2025 Healthcare Workforce Series** (Physicians/Nurses) Job satisfaction, trust in leadership, internal comms

- » **Full-service market research:** Quantitative and qualitative research from design and execution to analysis and recommendations
- » **Campaign thinking and approach:**
 - » We uncover perception and feelings through a political lens – how do people really feel about the organization, is it meeting its mission, etc.
 - » Messaging recommendations and strategy
- » **Holistic perspective:** Not just what people say, but how they behave and make decisions, validated by benchmarks and external sources
- » **Data is the means, not the end:** We go deeper than headlines to get to actionable insight, to inform branding and messaging strategy that will move the needle

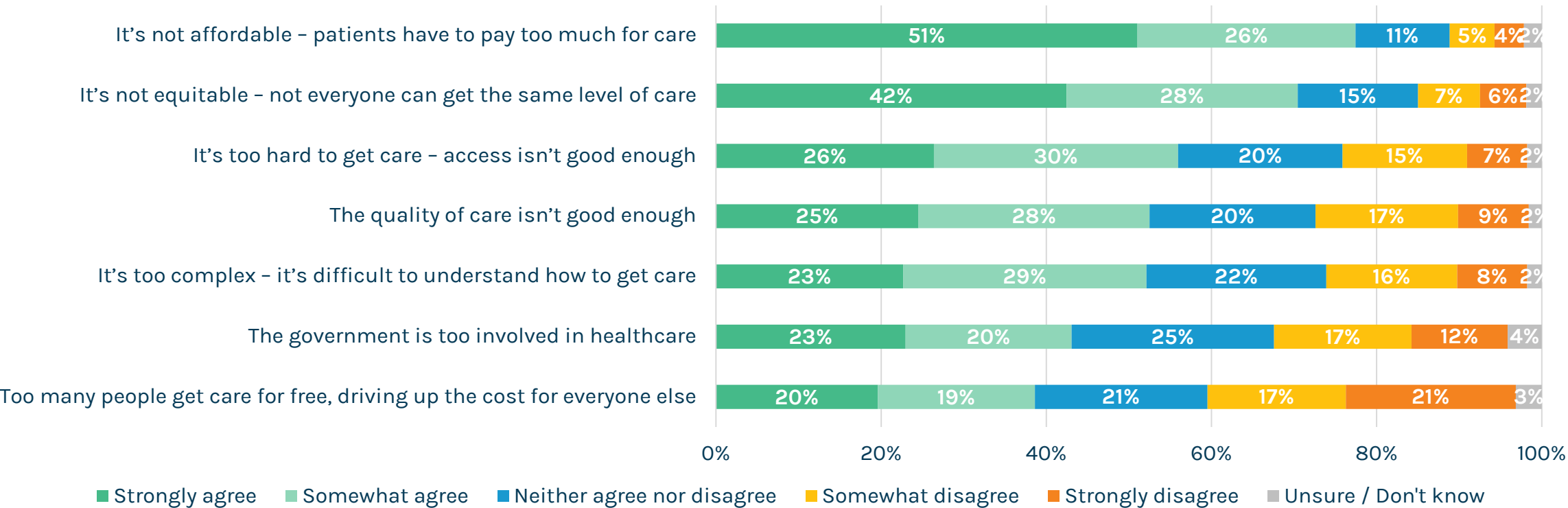




Healthcare's Precarious Position

The public overwhelmingly sees healthcare as costly and unfair

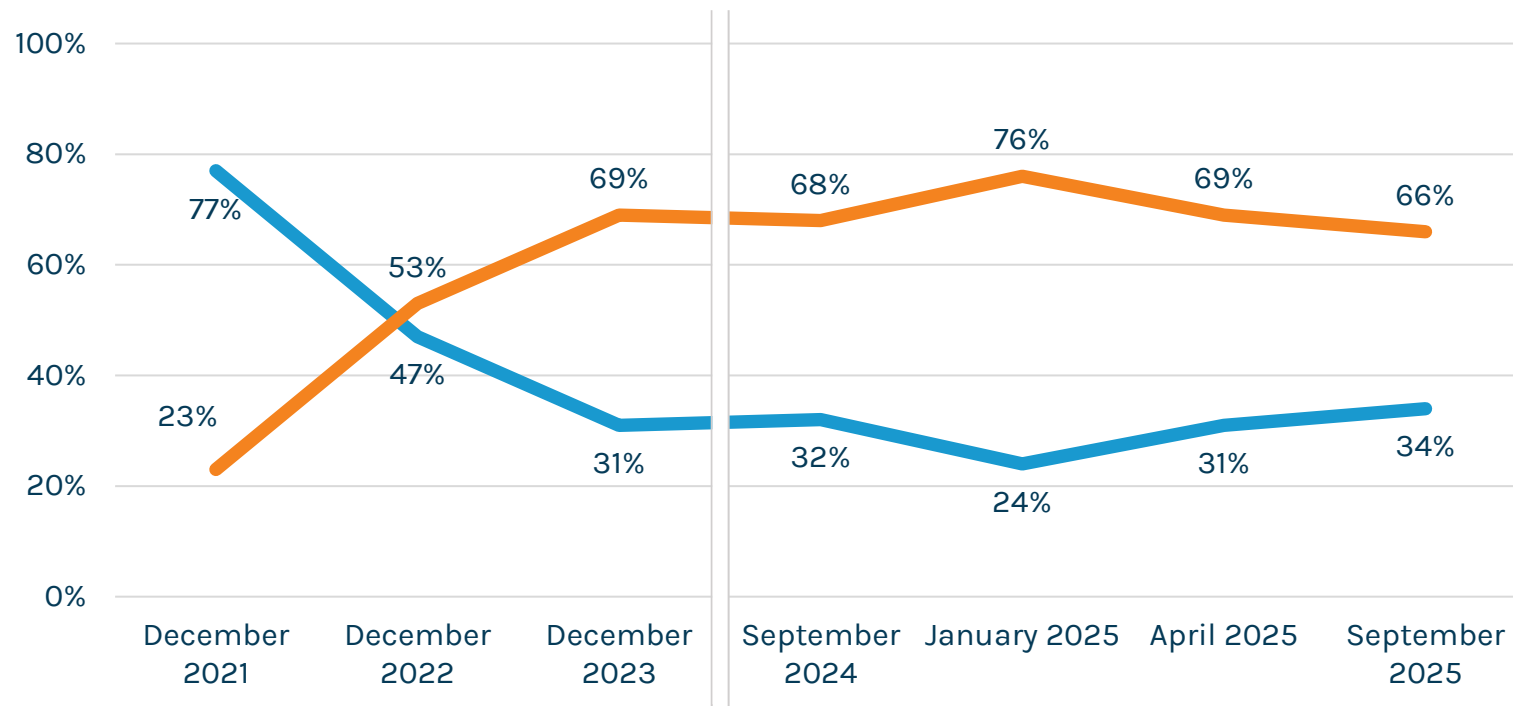
How much do you agree/disagree with the following statements about the U.S. healthcare system?



Perception that hospitals in general put patients over profits remains strongly negative

Whether you agree or disagree with each of the following statements, please select which one you agree with the most.

- Hospitals in the U.S. are mostly **focused on making money**
- Hospitals in the U.S. are mostly **focused on caring for patients**



*December 2021: Which do you believe is a higher priority for health care providers such as hospitals, clinics and health care systems? Providing patients the best quality of care / Running a strong business, including making money and expanding.

**Break in the plot indicates the point at which tracking shifted from annual to quarterly.

4/25 N=814
12/21-9/25 N=~1000

The Stakes for Pediatrics

Medicaid cuts will hurt all American children — not just those publicly insured

From federal legislation cutting Medicaid to states targeting tax-exempt status and much more, providers of care – including children’s hospitals – face a barrage of extremely harmful impacts from today’s policy environment.

Winning and maintaining public trust has never been more important.

US hospitals suspend healthcare for transgender youth after Trump order

House lawmakers scrutinize nonprofit hospitals’ tax-exempt status

Trump Threatens Harvard’s Tax Status, Escalating Billion-Dollar Pressure Campaign

“Hefty” CEO pay at children’s hospital raises questions

IRS audits spotlight hospital community benefit spending

RFK Jr.’s vaccine panel makes a controversial change to the childhood vaccine schedule



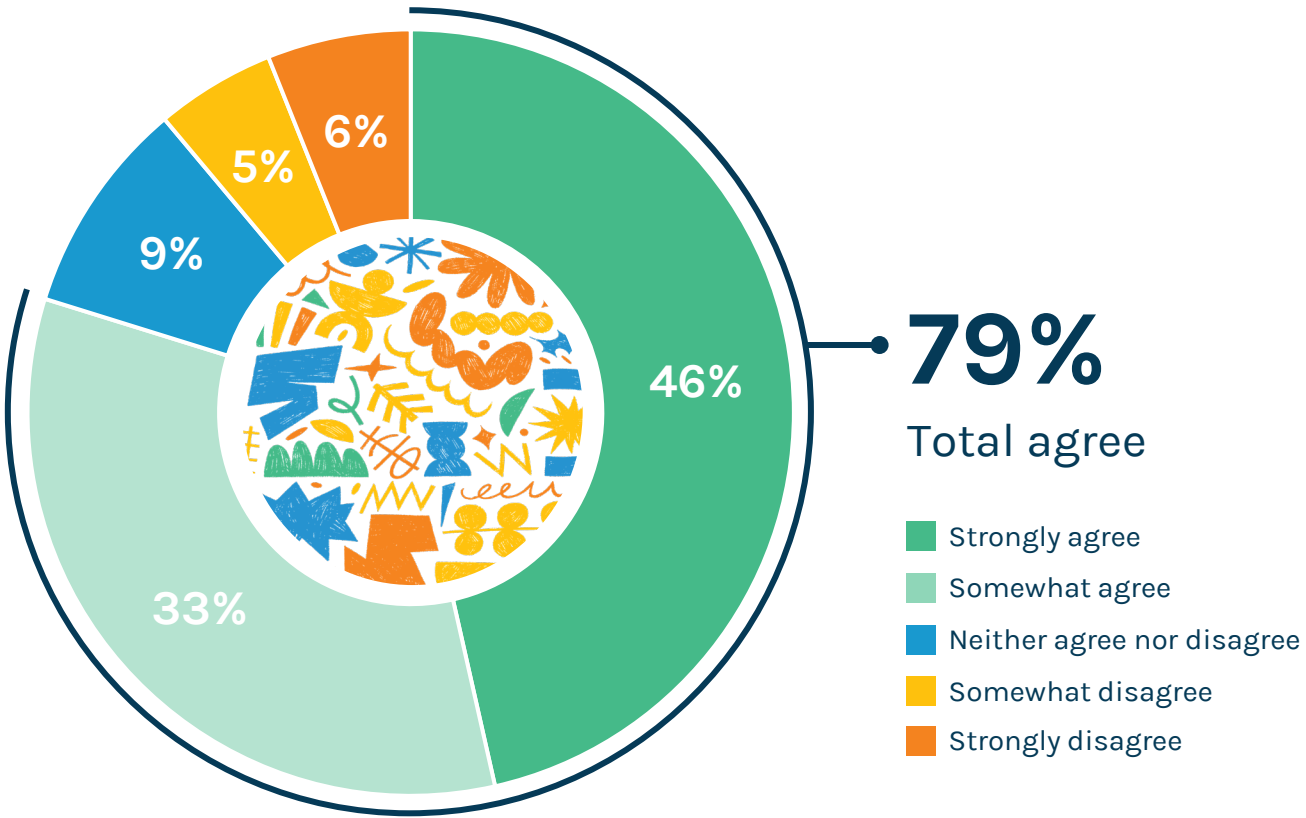
People Know & Trust Children's Hospitals

Majority trust children's hospitals to care for children in their community

Do you agree or disagree with the following statement about children's hospitals?
"I trust children's hospitals with the health of my children / kids in my area"

Trust in children's hospitals is universally high.

Parents (82%) are somewhat more likely to agree than non-parents (71%). The only demographics that dip below 70% agreement are those 65+ (64% agree, 20% neutral, 16% disagree) and the uninsured (65% / 16% / 18%).





Take a guess...

What percentage of respondents
said children's hospitals put
patients over profits?



ANSWER IN CHAT

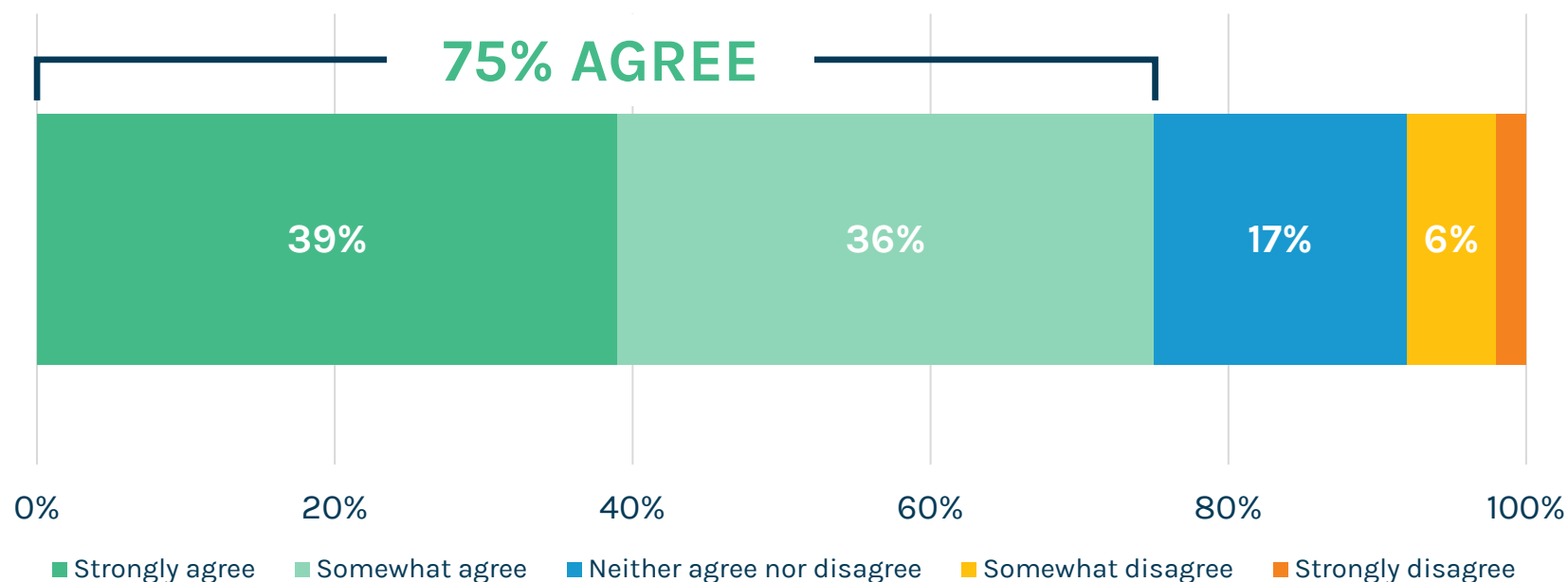


Significantly more trust in patients over profits among children's hospitals

Please indicate whether you agree or disagree with each of the following statements.

I trust that children's hospitals are...

Care more about patients than they do about their financial bottom line





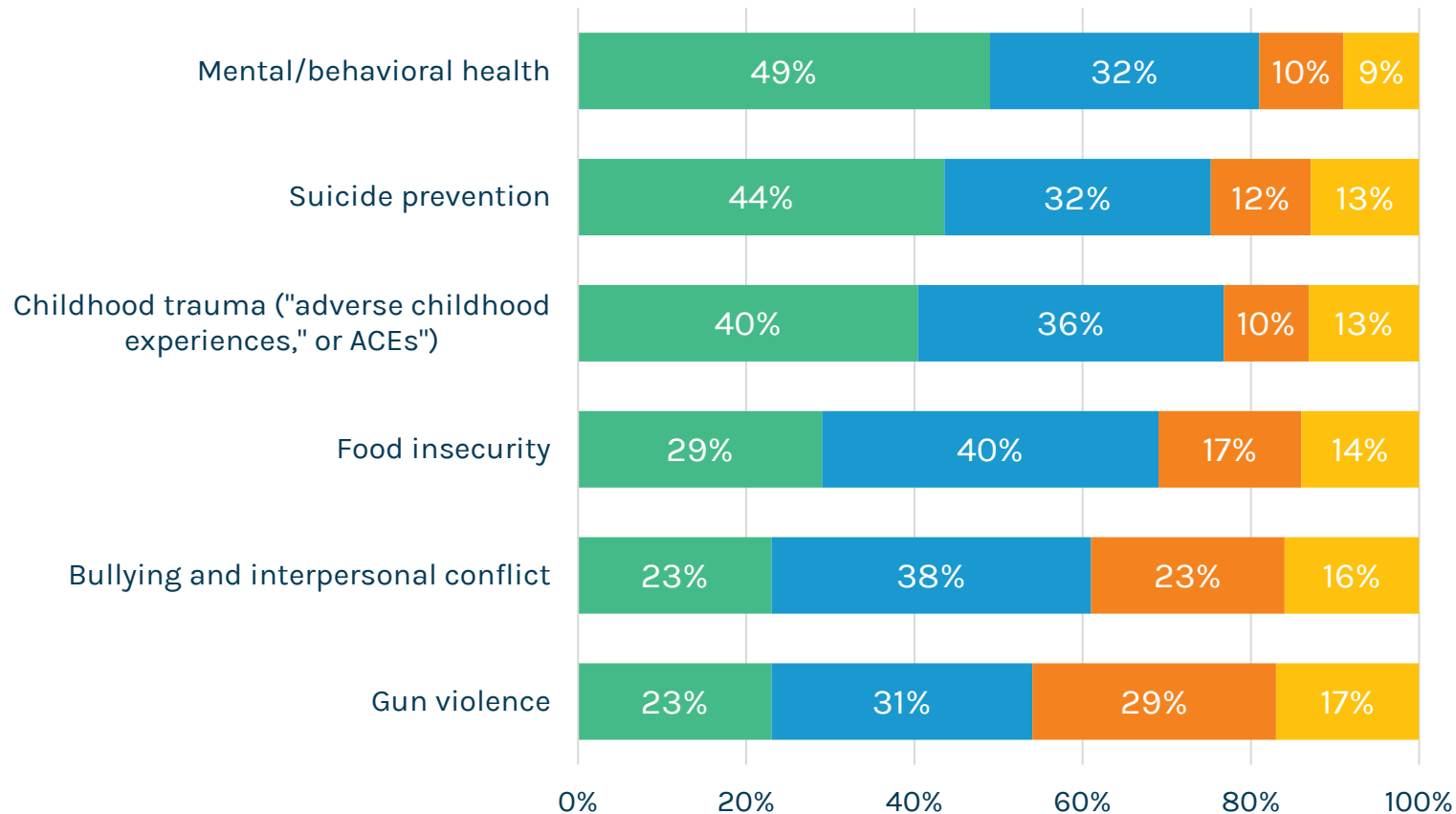
**Children's hospitals are more trusted
to prioritize patients over profits.**

How do people feel and what
do they know about our work
in our communities?

Public supports children's hospitals playing a role in health issues beyond medical care

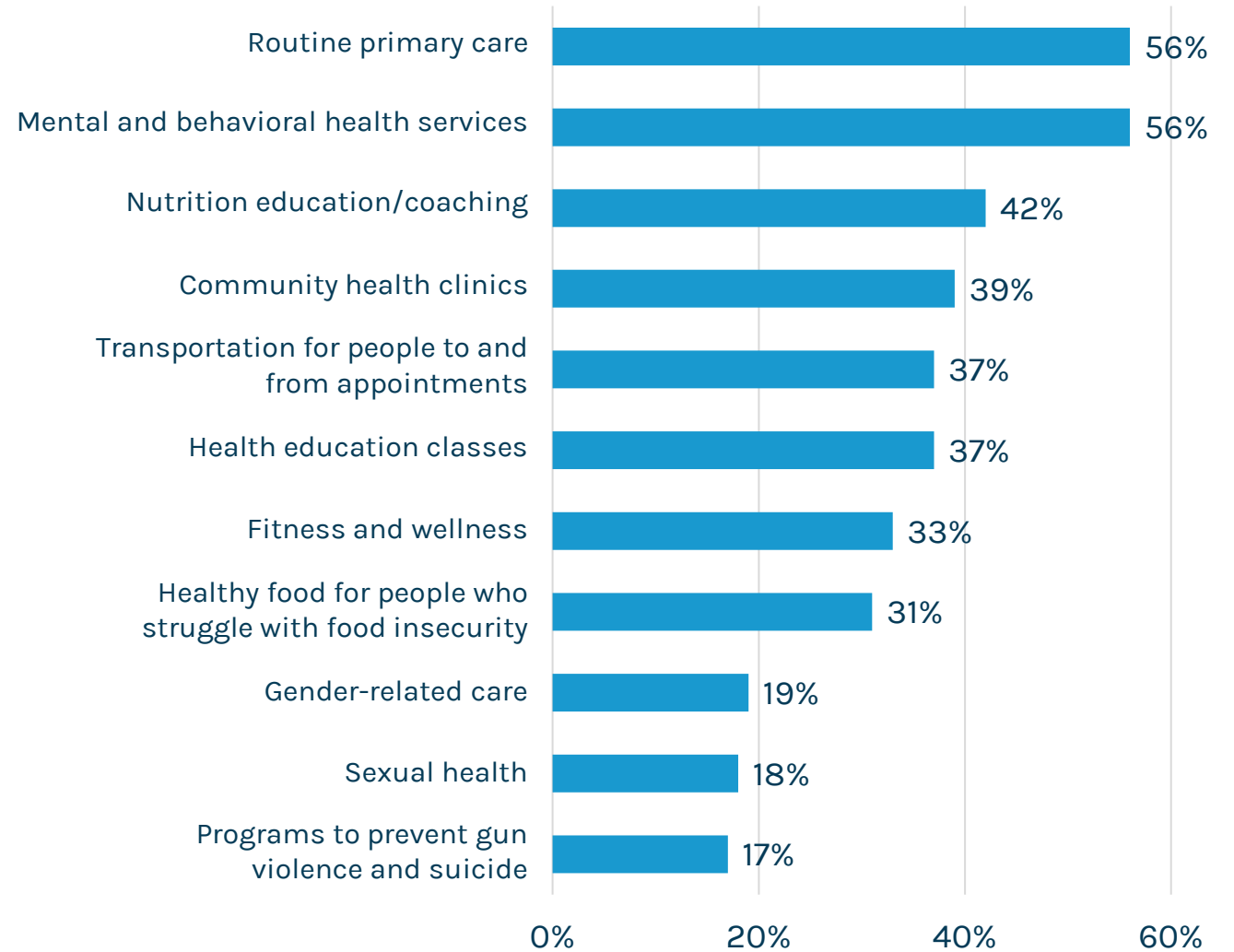
Do you think hospitals should be heavily involved in addressing the following issues, somewhat involved or not at all involved (i.e., they should leave these issues to other organizations like social services, schools, churches and community organizations)?

- Heavily involved
- Somewhat involved
- Not at all involved (leave the work to other organizations)
- Unsure



Limited public awareness of non-acute services provided by children's hospitals

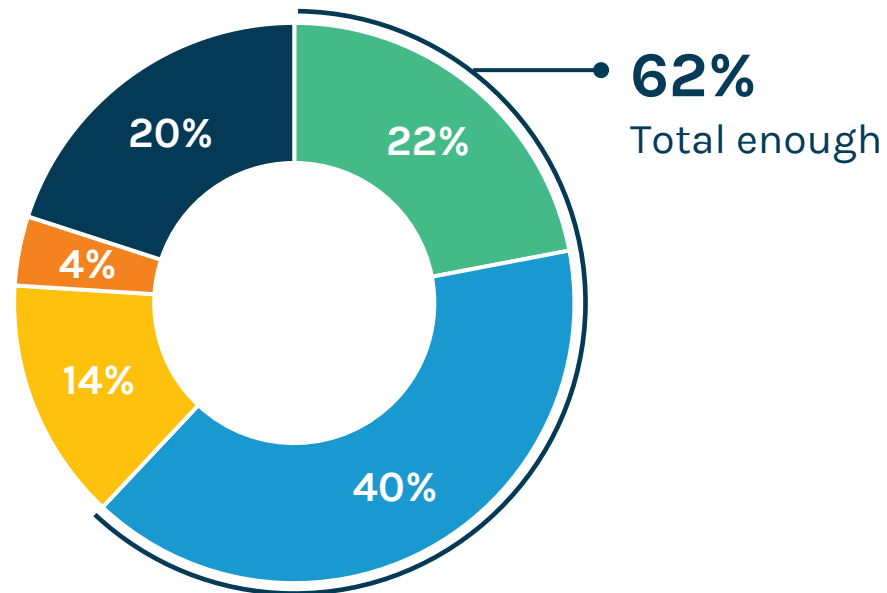
As you know, children's hospitals provide medical care such as surgery, emergency care, specialty care for chronic diseases and cancer. Beyond those medical services, are you aware of children's hospitals providing any of the following?



4 in 10 unsure or don't believe children's hospitals provide enough to justify tax exempt status

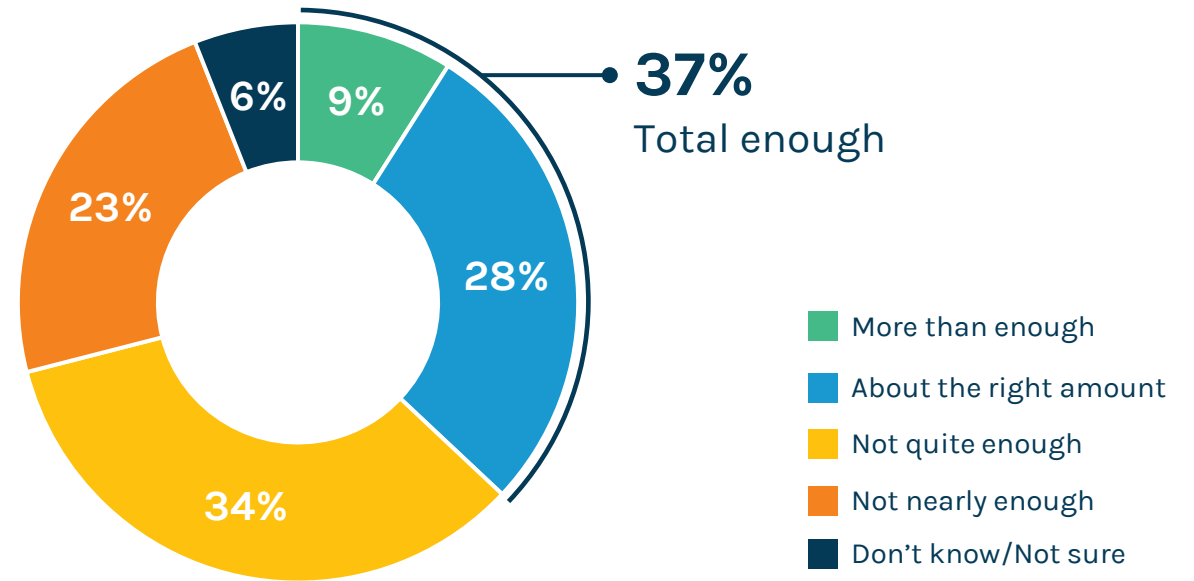
"Community benefit" is often defined as providing services designed to improve community health and help increase access to healthcare. In general, how much community benefit do...

...children's hospitals in your area provide?



N=1007

*...U.S. hospitals provide?**



N=506

- More than enough
- About the right amount
- Not quite enough
- Not nearly enough
- Don't know/Not sure

*Community benefit survey
4/25 Sample A N=506

HOW TO IMPACT PERCEPTION:
CHILDREN’S HOSPITALS

What is the relationship between perceptions of individual community benefits and support of hospitals’ tax-exempt status?

A drivers’ analysis of the 15 community benefits revealed five with the greatest impact on support of children’s hospitals having tax-exempt status.

N=999*
**Observations with missing income status were excluded from analysis (N=8). See appendix for analysis methodology.*

SUPPORT OF TAX-EXEMPT STATUS

IMPACT

- Training Doctors & Nurses
- Financial Assistance
- Healthy Food
- Nutrition & Physical Education Classes
- Housing Services
- Vaccinations in Community Clinics
- Medicaid Shortfall
- Sponsoring Health Events (e.g., 5K)
- Providing Money Losing Services
- Injury and Accident Prevention Services
- Health Education Classes
- Transportation to Appointments
- Funding Parks/Sports Venues
- Funding Research
- Providing Nurses for Schools

HOW TO IMPACT PERCEPTION: CHILDREN'S HOSPITALS

Is there a relationship between the number of community benefits perceived positively (e.g., children's hospitals are doing enough) and support of tax-exempt status?

The drivers' analysis of the 15 community benefits further revealed each aspect of community benefit perceived positively multiplies impact on perception

*N=999***

**Odds ratio from regression analysis = 1.25*

***Observations with missing income status were excluded from analysis (N=8). See appendix for analysis methodology.*

SUPPORT OF TAX-EXEMPT STATUS

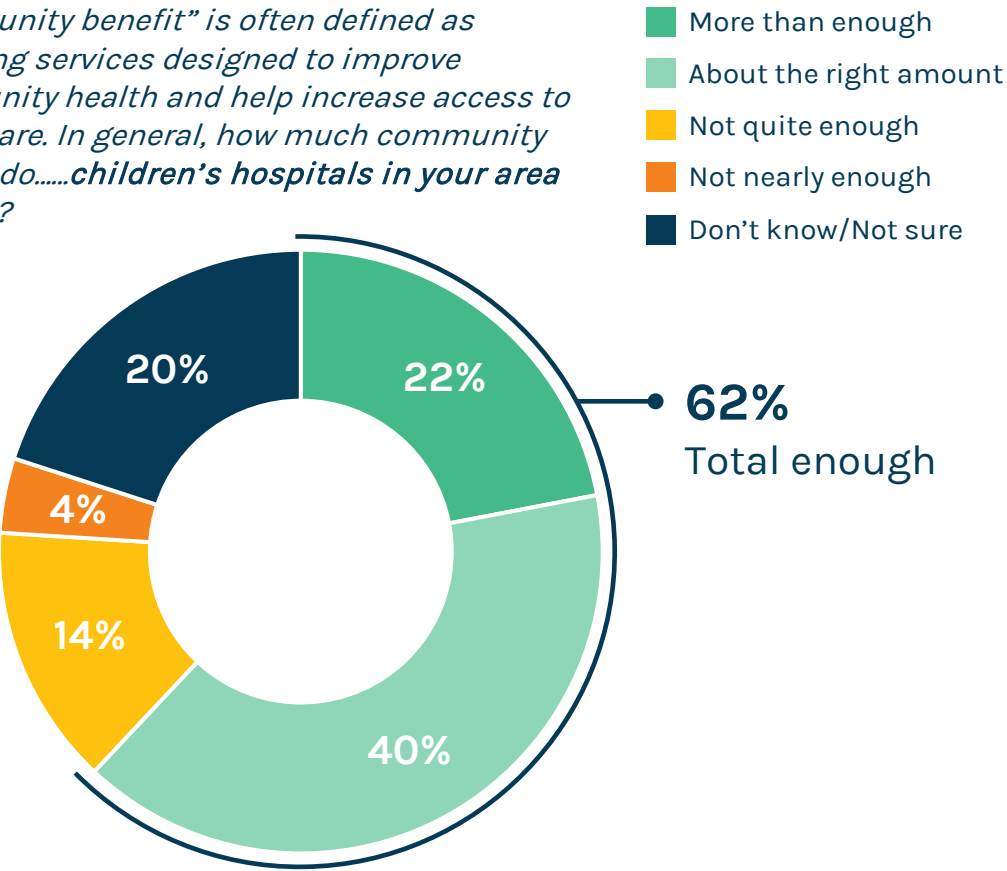
I M P A C T



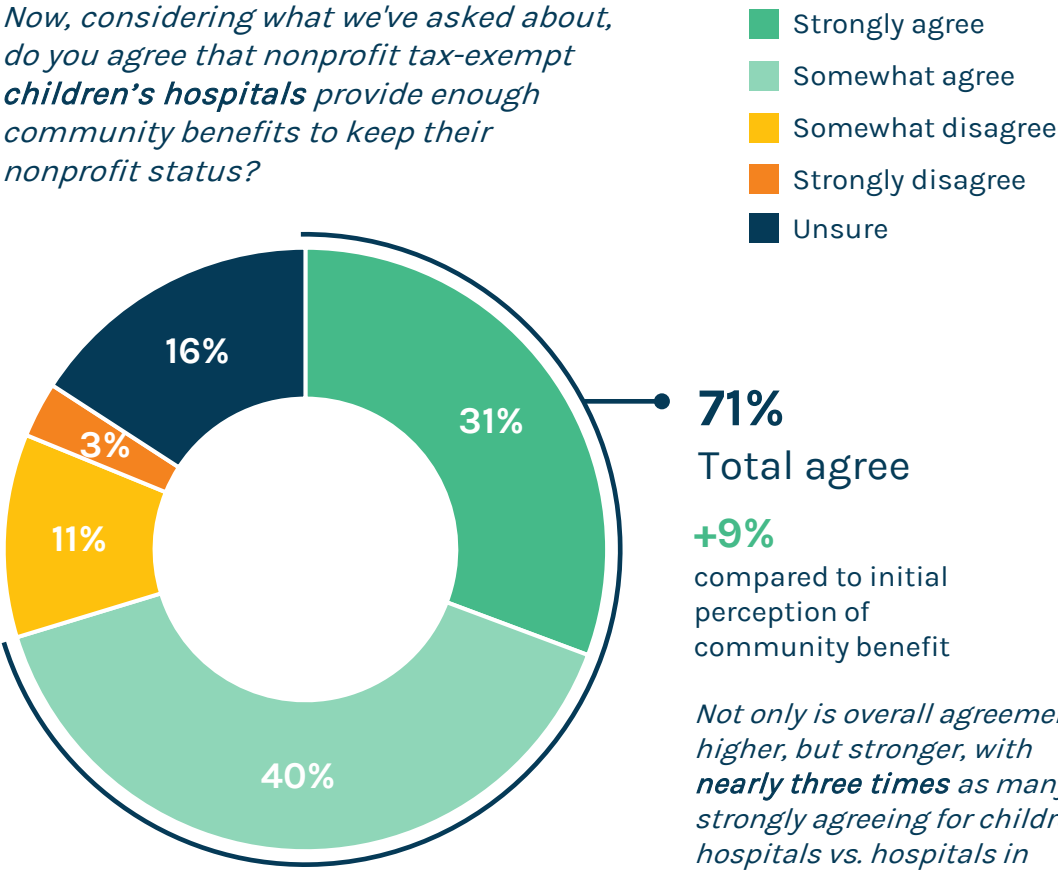
With **each additional** community benefit that is perceived positively, the odds* of supporting nonprofit status increases by 25% or more.

Learning about community benefit moves the needle

“Community benefit” is often defined as providing services designed to improve community health and help increase access to healthcare. In general, how much community benefit do.....children’s hospitals in your area provide?



Now, considering what we've asked about, do you agree that nonprofit tax-exempt children’s hospitals provide enough community benefits to keep their nonprofit status?



+9%
compared to initial perception of community benefit

Not only is overall agreement higher, but stronger, with nearly three times as many strongly agreeing for children’s hospitals vs. hospitals in general

*Community benefit survey
4/25 Sample A N=506

N=1007

N=1007

What question do we need to ask next?

What are the questions you need to answer for your children's hospital and health system?



ANSWER IN CHAT

OR



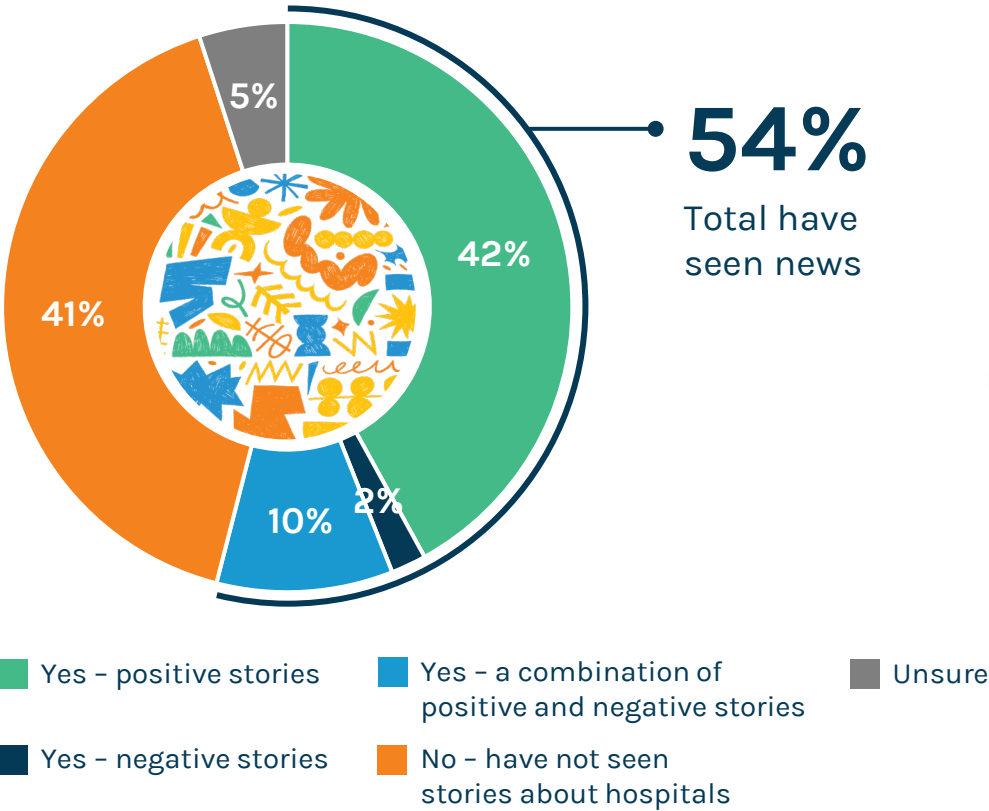
Scan the QR code to send us an email with your questions



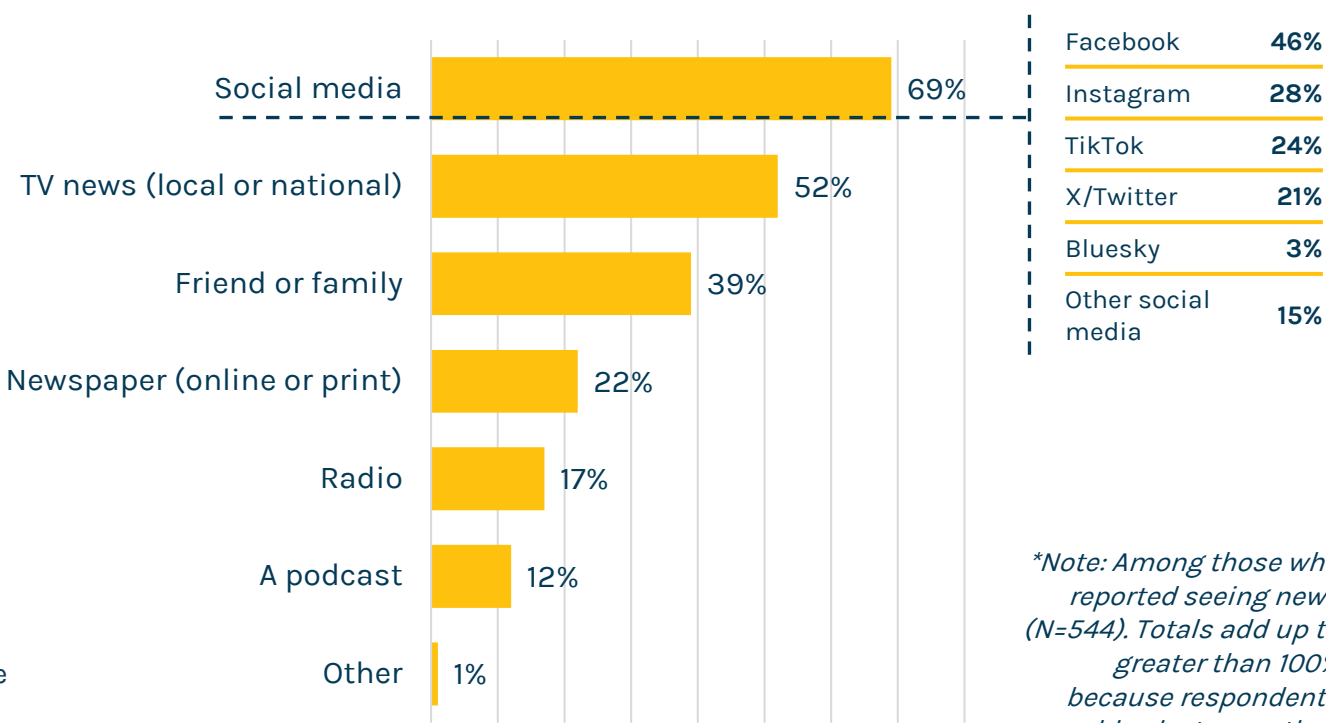
Telling the Story

Four in 10 recall positive coverage, though just as many report they have not seen news about children’s hospitals

In the past six months, have you seen, read or heard news about hospitals/children's hospitals in your area?



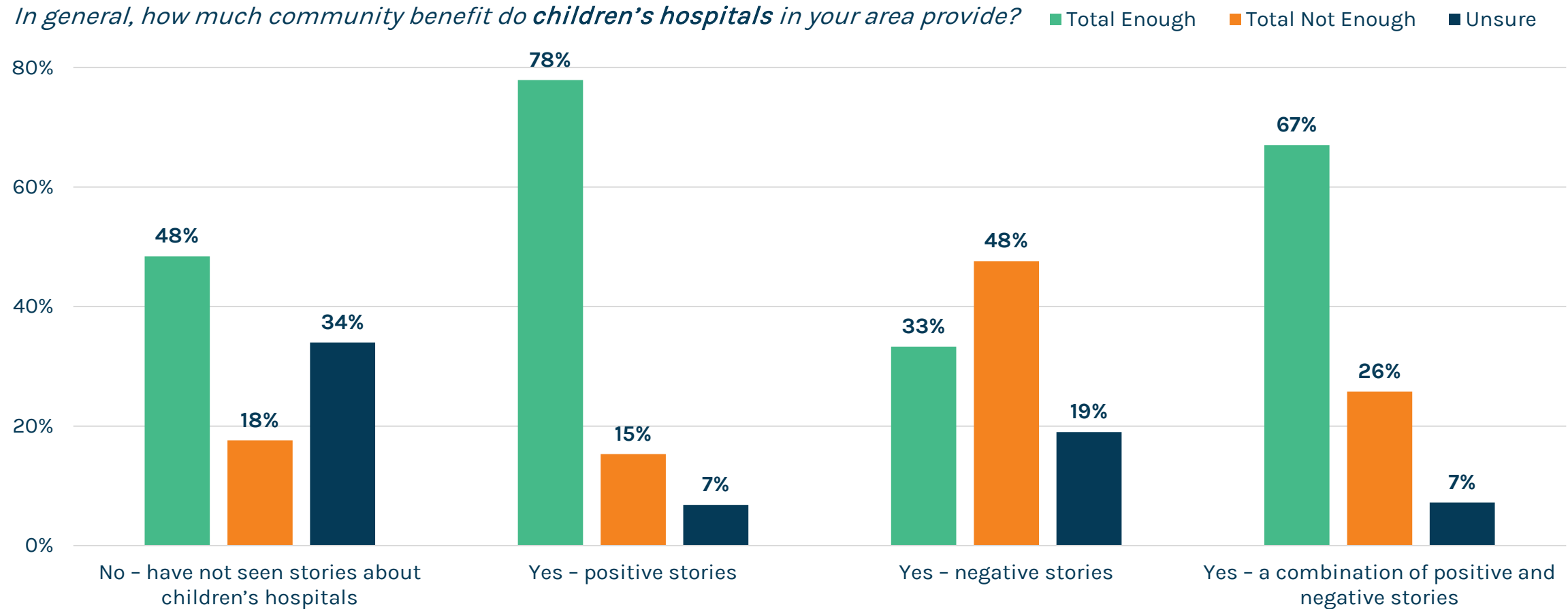
*And where did you see, read or hear news about hospitals in your area?**



**Note: Among those who reported seeing news (N=544). Totals add up to greater than 100% because respondents could select more than one option.*

Seeing news about children's hospitals influences perceptions of community benefit

No - have not seen: N=409
Yes - positive: N=425
Yes - negative: N=22
Yes - combination: N=96

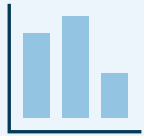


Recommended Action Steps



A complex environment, a critical time to act

Protecting the public's trust in children's hospitals is an imperative.



YOUR data drives YOUR story

Invest in understanding your complete landscape. Children's Hospitals need insights across trust, philanthropy, brand and choice to drive strategy.



This is no time for silos

Build an alliance across Advocacy, Philanthropy, Strategy, Community Health and Marketing Communication.



Human impact > numbers

Framing community benefit around a "big number" can actually detract from understanding your commitment to the mission of care.



Bring your partners into the fold

Children's hospitals are known for partnership. From academics through community organizations, tell the story together.



Contact Us



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Scan the QR
code to
download the
full report.





Thank you!

Demographics

N = 1007
Margin of error: ± 3.2%

Gender

Male	47%
Female	53%

Age

18-34	28%
35-44	24%
45-54	22%
55-64	23%
65+	4%

Resident Area

Urban	37%
Suburban	43%
Rural	21%

Health Coverage (Select all that apply)

Private Health Ins.	65%
Medicare	8%
Medicaid	20%
Obamacare	2%
Veterans Health (VA)	1%
Tricare	< 1%
No health insurance	9%

Race/Ethnicity (Select all that apply)

White – Not Hispanic or Latino	67%
Hispanic or Latino	22%
Black or African American	13%
Asian	4%
American Indian or Alaska Native	3%
Hawaiian/Other Pacific Islander	1%
Middle Eastern/North African	< 1%
Other	< 1%

Self-identified Household Income

Under \$50,000	39%
\$50,000 to \$74,999	21%
\$75,000 to \$99,999	14%
\$100,000 or more	26%
Missing	1%

Parent/Caregiver

Yes	75%
No	25%

Parent/Caregiver of Children Under 18

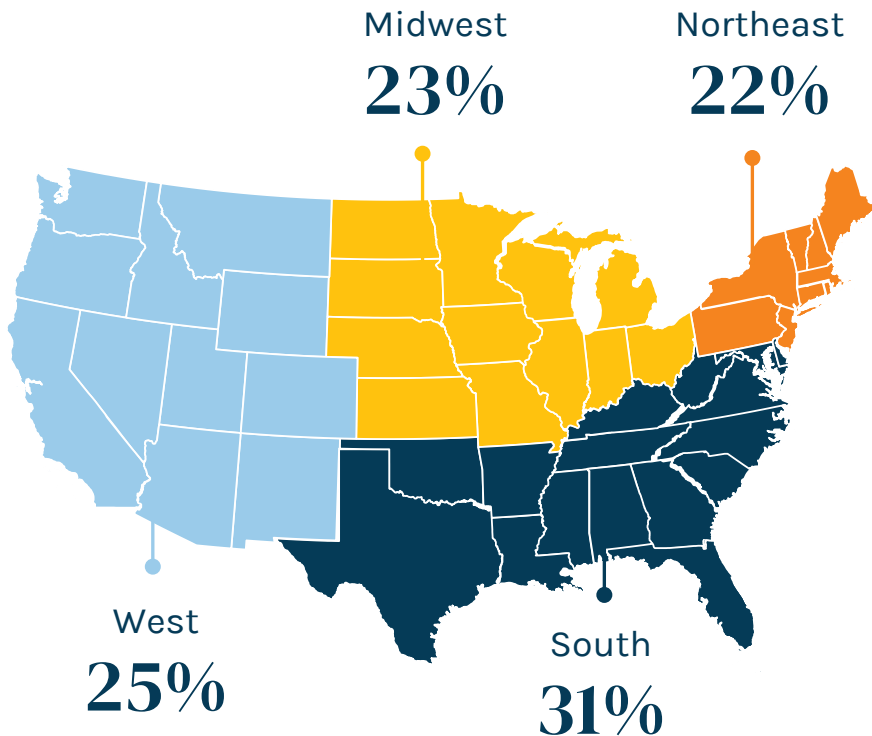
Yes	60%
No	40%

Experience with children's hospitals

Yes	64%
No	36%

Seen news about children's hospitals

Yes	54%
No	46%



Note:
Totals may not add up to 100% due to rounding

COMMUNITY BENEFIT

Field Dates:
4/8/25-4/16/25
Representative sample
of U.S. adults age 18+
N = 1031
Margin of error: ± 3.2%

Methodology

We conducted an online survey of more than 1,000 adults age 18+ from across the U.S. The survey took 10 days to complete. The margin of error is $\pm 3.2\%$. Parents and caregivers of children under 18 were oversampled as the primary target audience and to ensure robust subgroup comparisons. Survey responses were weighted to reflect regional population distributions.

Survey respondents comprised a representative sample of the overall population on demographics including:

- » Gender
- » Race/ethnicity
- » Age
- » Census region
- » Insurance type and status
- » Household income

Data quality and security is ensured through manual and automated review, including IP verification, link manipulation detection, duplication prevention and visual review of responses, among other safeguards.

We examined relationships between demographic characteristics and perceptions of children's hospitals using Chi-Square Tests of Independence. This method assesses if the observed distribution of responses differs significantly from what would be expected if there was no relationship present. A significance threshold of $p\text{-value} < 0.05$ was used to determine whether associations were statistically meaningful. When significant differences are observed, we interpret these as evidence of a relationship between the demographic factor and the perception being tested.

Regression analysis is a statistical method used to evaluate the relationship between one or more predictor variables and an outcome variable. Logistic regression models were used to examine associations between perception of community benefit (predictor) and nonprofit status for children's hospitals (outcome). Final models were adjusted for age, race/ethnicity, gender, income, insurance status, region, urban/rural status, parental status, experience with a children's hospital and if they have seen news about children's hospitals.

All statistical analyses were performed using IBM SPSS Statistics.

Subscribe to Our Thinking



Quick Think

Weekly three-minute breakdown of a key healthcare story from the week. It's an actionable take on the news that you won't get anywhere else.



The Backstory

President and Co-Founder Anne Hancock Toomey demystifies respected leaders who've had success along the way because of the kind of leaders they've chosen to be.



Surveys

Research & deep dives into existing and emerging healthcare trends, with insights from across our brilliant network.

Specialists in Academic Medicine and Pediatrics



Takeaways: Higher trust and important work to do

Bright Spots: Trust and engagement are strengths to build upon

About three-quarters of those surveyed agree that children's hospitals care more about their patients than the bottom line. In January, only about three in 10 said hospitals in general focus more on patients than profits.

Nearly two-thirds have had experience with a children's hospital, either as a patient, as a caregiver of a patient or as a patient's family member or friend.

Meanwhile, about half said they have supported causes related to children's health - including children's hospitals - through volunteering or donating money.

AWARENESS CHALLENGE: COMMUNITY HEALTH PROGRAMS AND STORYTELLING

Our findings show the public has limited awareness of the breadth of community initiatives and non-acute care programs offered by children's hospitals. In addition, only 40% said they had seen or heard positive news about children's hospitals. These factors are holding people back from believing these organizations provide enough community benefit.

There is significant room to improve these numbers and boost perception of children's hospitals in ways that can support a swath of priorities, including policy objectives. (Deeper research analysis also reveals specific elements that drive perception.)

PERCEPTION CHALLENGE: PROVIDING "ENOUGH" COMMUNITY BENEFIT

While there is a high level of trust that children's hospitals put caring for kids over making money, that trust only somewhat translates to a strong perception that children's hospitals are providing enough community benefit: Only about 60% of respondents feel children's hospitals are providing enough community benefit and 20% "don't know."

While these are better numbers than the four in 10 who say hospitals in general provide enough community benefit, there is room to grow. The levels of experience, engagement and overall trust people have in children's hospitals present a powerful opportunity to improve perception.

DEMOGRAPHICS

Donated to children's hospital or children's health cause

Have you ever donated to or volunteered at a children's hospital or other cause focused on children's health?

- **Yes – have donated money or other financial gifts**
- **Yes – have volunteered**
- **No – have not donated money or volunteered**

*Statistically significant association (Chi-Square Test of Independence, $\alpha=0.05$)

Percentages are totaled by **row**.

For example, 39% of women have donated and 61% have not, equaling 100% of women.

		Donated	Have not donated
Total		44%	56%
Age*	18-34 (N=283)	52%	48%
	35-44 (N=240)	53%	47%
	45-54 (N=216)	33%	67%
	55-64 (N=231)	38%	62%
	65+ (N=37)	26%	74%
Gender*	Men (N=472)	50%	50%
	Women (N=535)	39%	61%
Race	White (N=616)	42%	58%
	Non-White (N=391)	46%	54%
Household income*	Under \$50,000 (N=389)	26%	74%
	\$50,000-\$99,999 (N=347)	51%	49%
	\$100,000 or more (N=266)	62%	38%
Insurance*	Private (N=645)	53%	47%
	Public (N=275)	30%	70%
	Uninsured (N=87)	23%	77%
Region*	Midwest (N=229)	38%	62%
	Northeast (N=221)	50%	50%
	South (N=308)	38%	62%
	West (N=248)	50%	50%
Environment	Urban (N=368)	50%	50%
	Suburban (N=428)	42%	58%
	Rural (N=211)	37%	63%
Parent/Caregiver*	Yes (N=754)	49%	51%
	No (N=253)	29%	71%
Experience with children's hospitals*	Yes (N=640)	53%	47%
	No (N=367)	29%	71%
Seen news about children's hospitals*	Yes (N=543)	56%	44%
	No (N=464)	29%	71%

Patient interactions at the heart of perceived quality of care

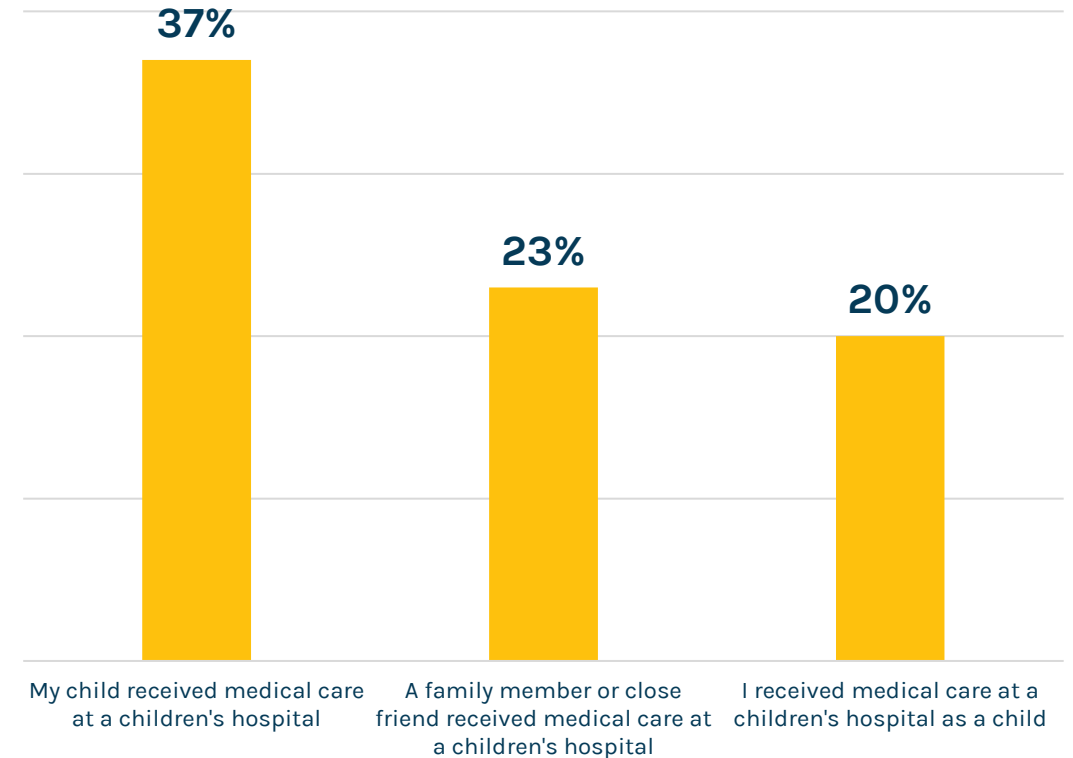
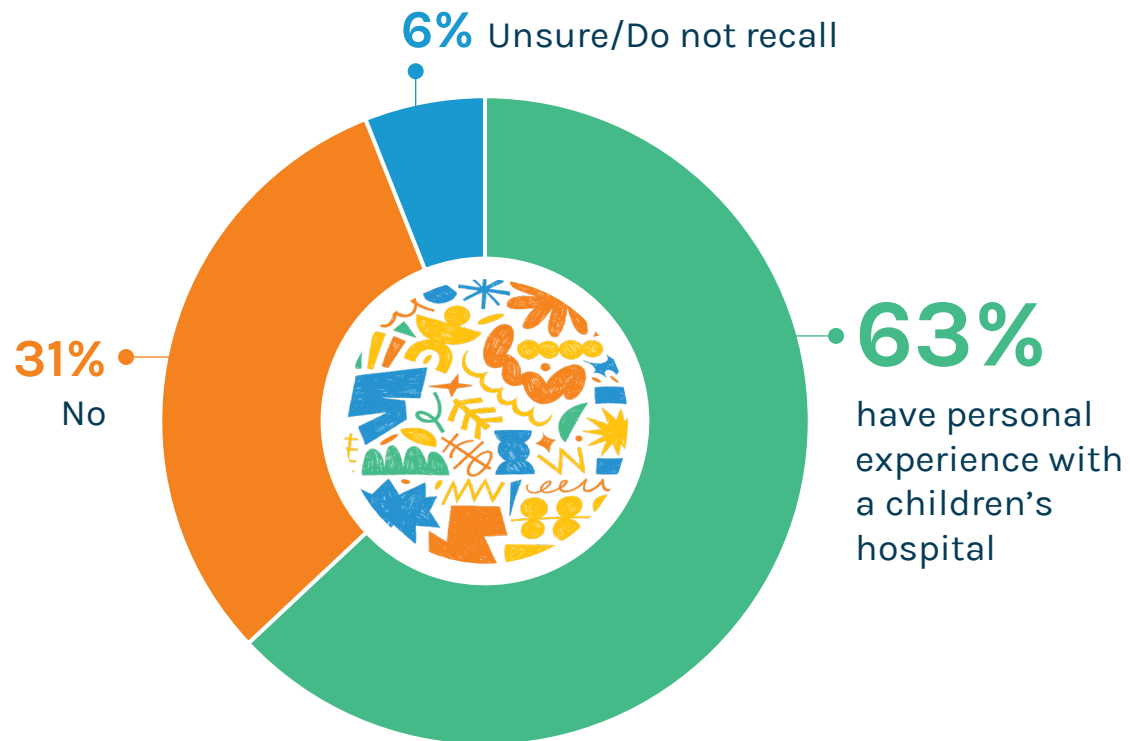
Thinking about the quality of care you get from a doctor or medical group, please rank the following in order of importance by completing the sentence, I know my child/kids in my community are getting quality care when...



	Rank	Average
The doctor listens to my/patients' concerns	1	3.3
The staff is caring and friendly	2	3.6
I/patients leave appointments with a plan for improving my/their health or resolving the problem	3	4.2
It's easy to get an appointment	4	4.6
The doctor or medical group has good online reviews from other patients	5	4.7
The doctor or medical group has good ratings from online rating sites or U.S. News rankings	6	5.0
The doctor or medical group has won awards for their quality or patient experience	7	5.1
The brand name of the organization or practice is well-known (for example, "Memorial Hospital" or "Elite Medical Group")	8	5.5

Nearly two-thirds have had experience with a children's hospital

Do you have any personal experience with children's hospitals?



Note: Totals add up to greater than 100% because respondents could select more than one option.

About half have supported children's hospitals or causes focused on children's health through donations or volunteering

Families with and without direct experience choose to give time or money

Among adults with children (N=754)

Child received care at a children's hospital



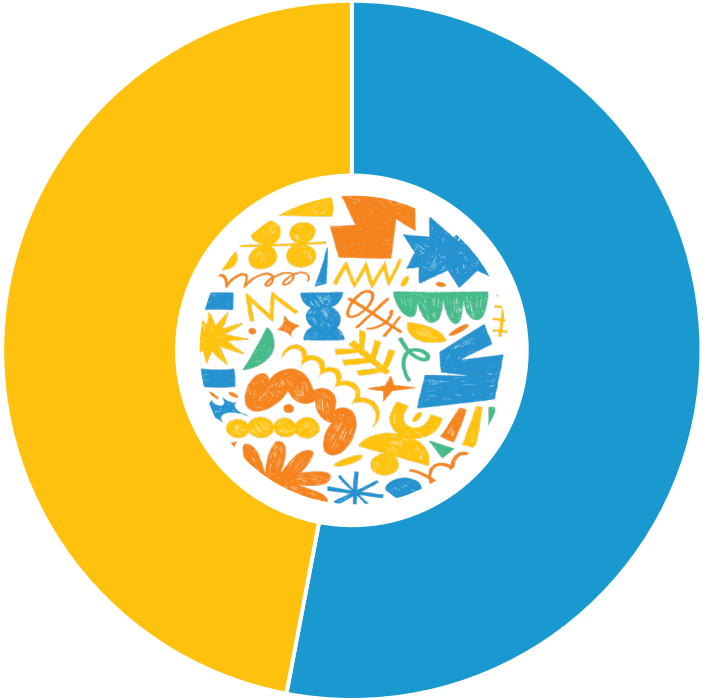
Child did not receive care at a children's hospital



■ Have donated or volunteered ■ Have not donated or volunteered

Have you ever donated to or volunteered at a children's hospital or other cause focused on children's health?

48%
have **not** donated
or volunteered

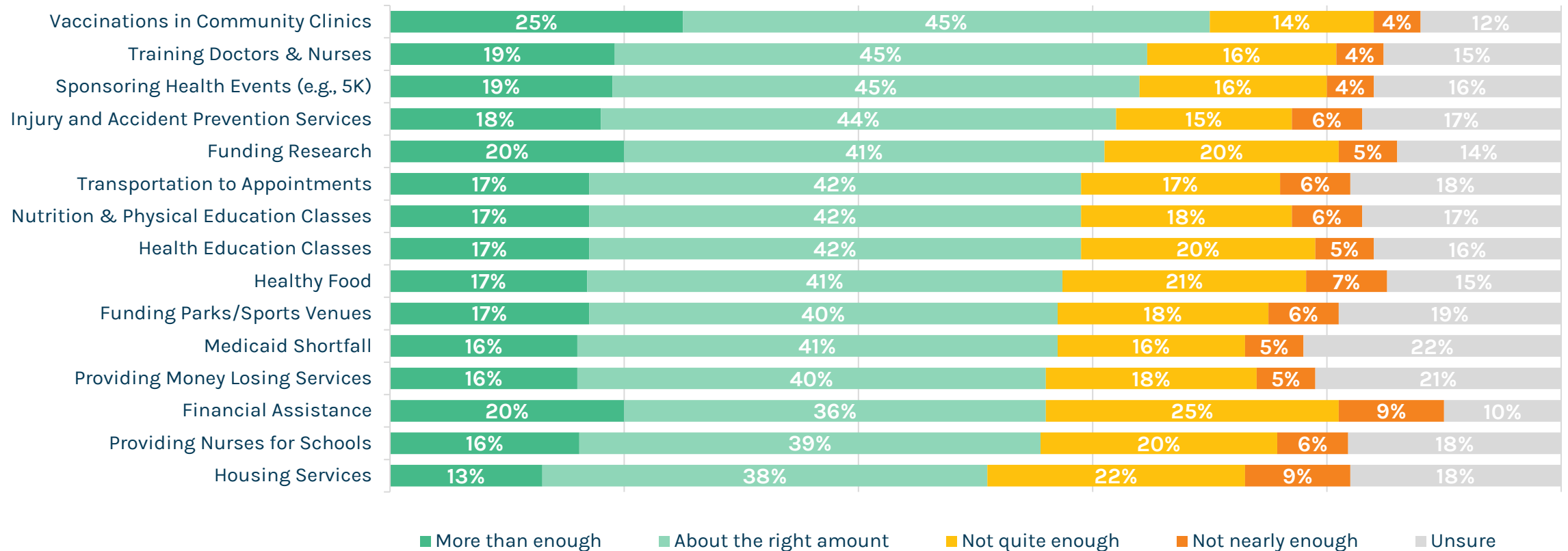


52%
have donated
or volunteered

All respondents (N=1007)

When asked about specific benefits, at least half or more think children's hospitals offer enough

Thinking about community benefits that hospitals provide... do you think hospitals provide too little, about the right amount or more than enough of each of the following community benefit services?



Full text options for elements of community benefit

Thinking about community benefits that children's hospitals provide... do you think children's hospitals provide too little, about the right amount or more than enough of each of the following community benefit services?

- » Helping kids or families find housing, or supporting programs that improve the quality of housing (such as lead and mold removal)
- » Providing or helping organizations that provide healthy food for kids in need or who do not have access to healthy food - for example by operating mobile food markets
- » Hosting free nutrition and physical education classes for kids at the hospital or community centers
- » Providing transportation to medical appointments for kids who don't have good access to transportation
- » Injury and accident prevention services, including helping with bike helmets and car seats
- » Providing nurses for schools
- » Hosting health education classes for kids
- » Funding sports venues and parks for local children
- » Sponsorships of events and activities designed to promote health and wellness (like a 5k run)
- » Providing financial assistance to help pay for medical care for families who cannot afford it
- » Providing free vaccinations to kids and their families in community centers
- » Providing training for new doctors and nurses
- » Providing services that lose money (i.e., the hospital pays more for staff, equipment and facilities to deliver that care than it is paid)
- » Funding research to develop new treatment for diseases that affect children
- » The hospital getting paid less than it costs to provide care for Medicaid patients (i.e., losing money on Medicaid patients)