



Children's Hospitals Landscape Report

Q4-2025

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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?

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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

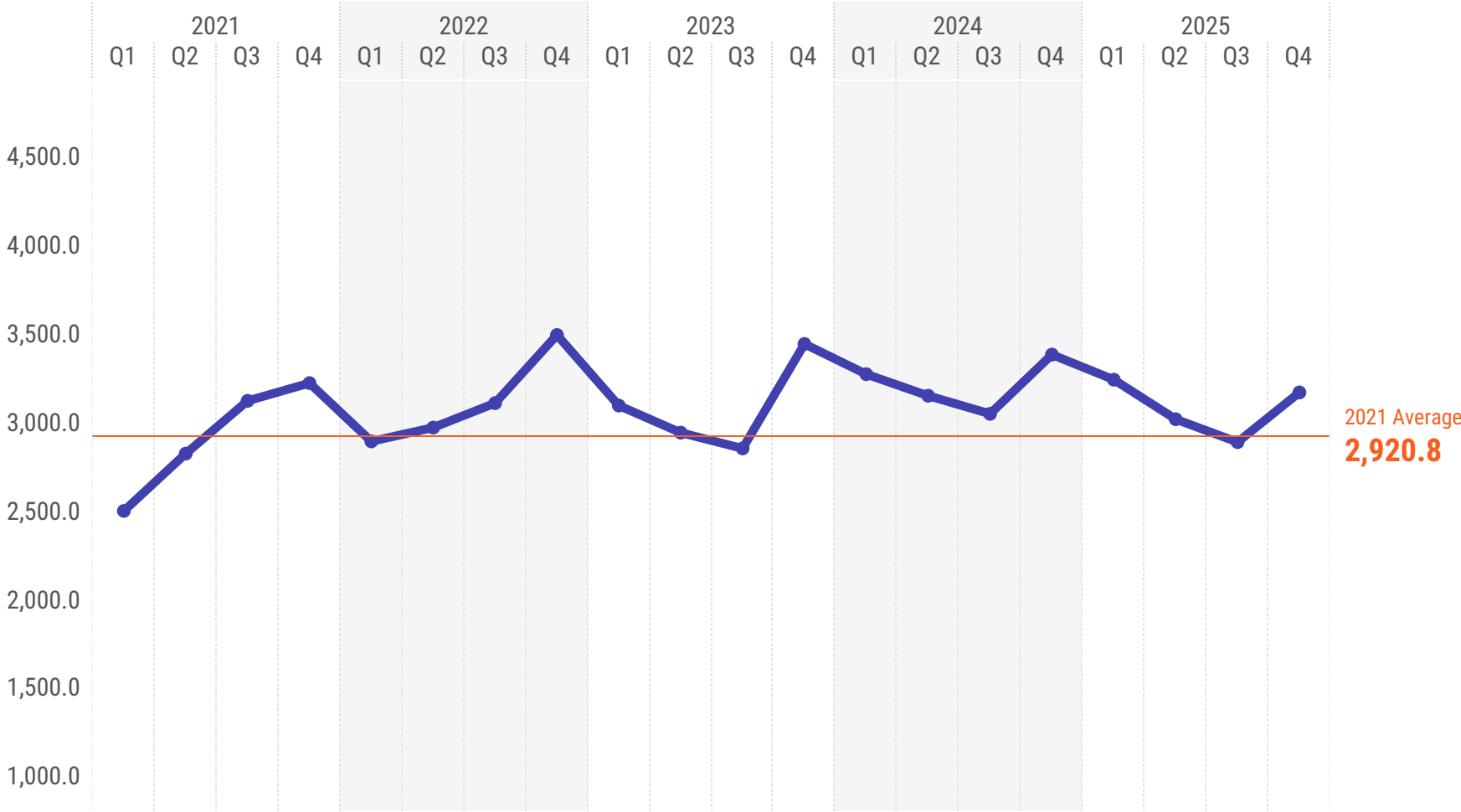
SURGERY CASES

EMERGENCY VISITS

Inpatient discharges have exhibited a consistent pattern over the past three years (higher in Q1/Q4, lower in Q2/Q3) and declined 4.2% in 2025 compared with 2024.



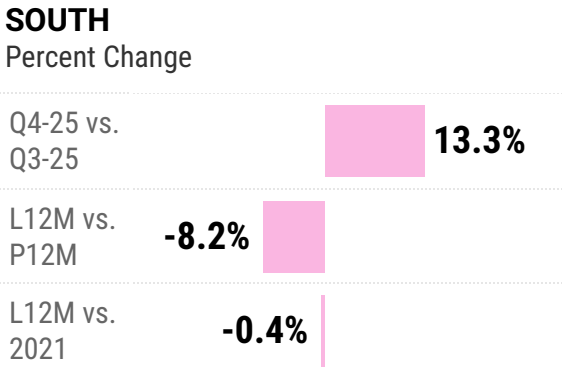
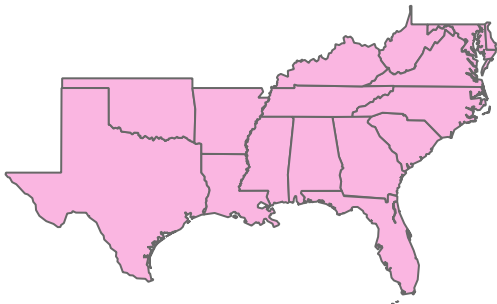
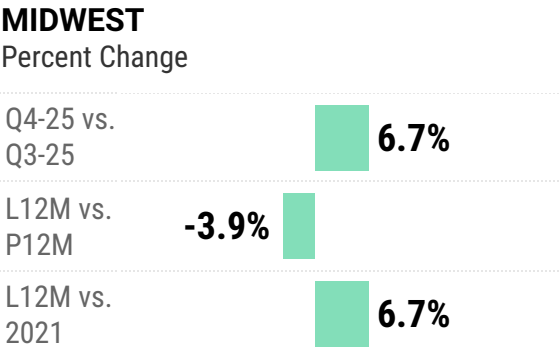
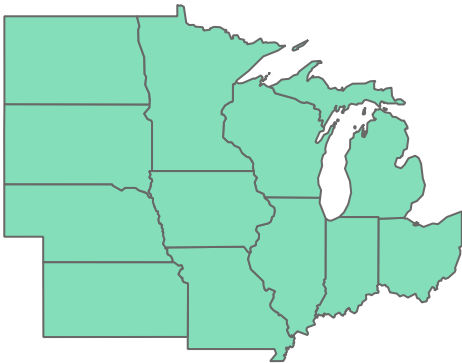
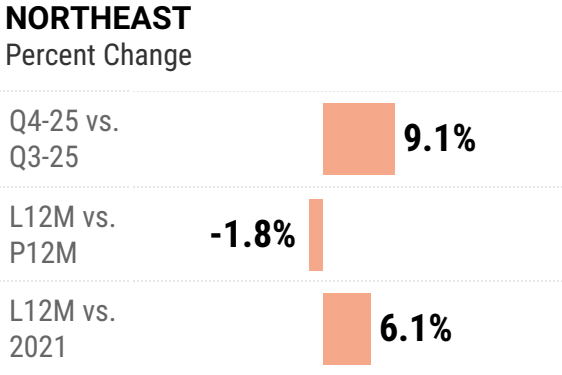
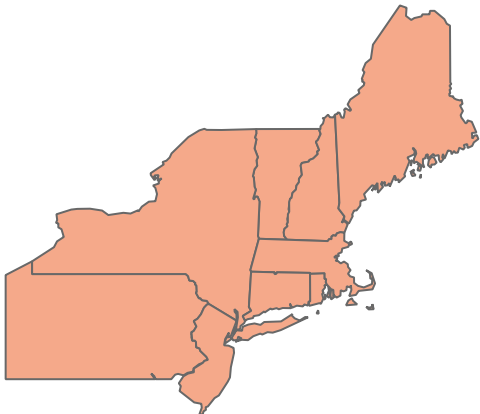
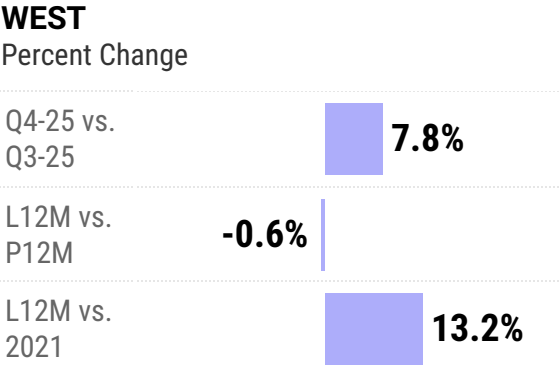
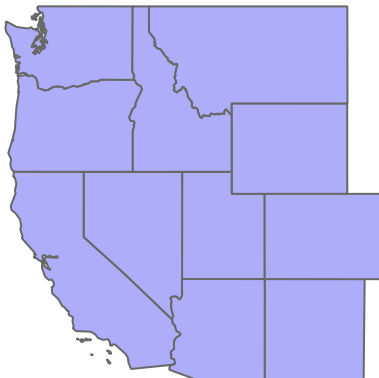
Inpatient Discharges



Q4-25 vs. Q3-25		9.7%
L12M vs. P12M	-4.2%	
L12M vs. 2021		5.6%

Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)

All regions saw declines in inpatient discharges in 2025 versus 2024. Two regions decreased by less than 2%, the Midwest by 3.9%, and the South by 8.2%.

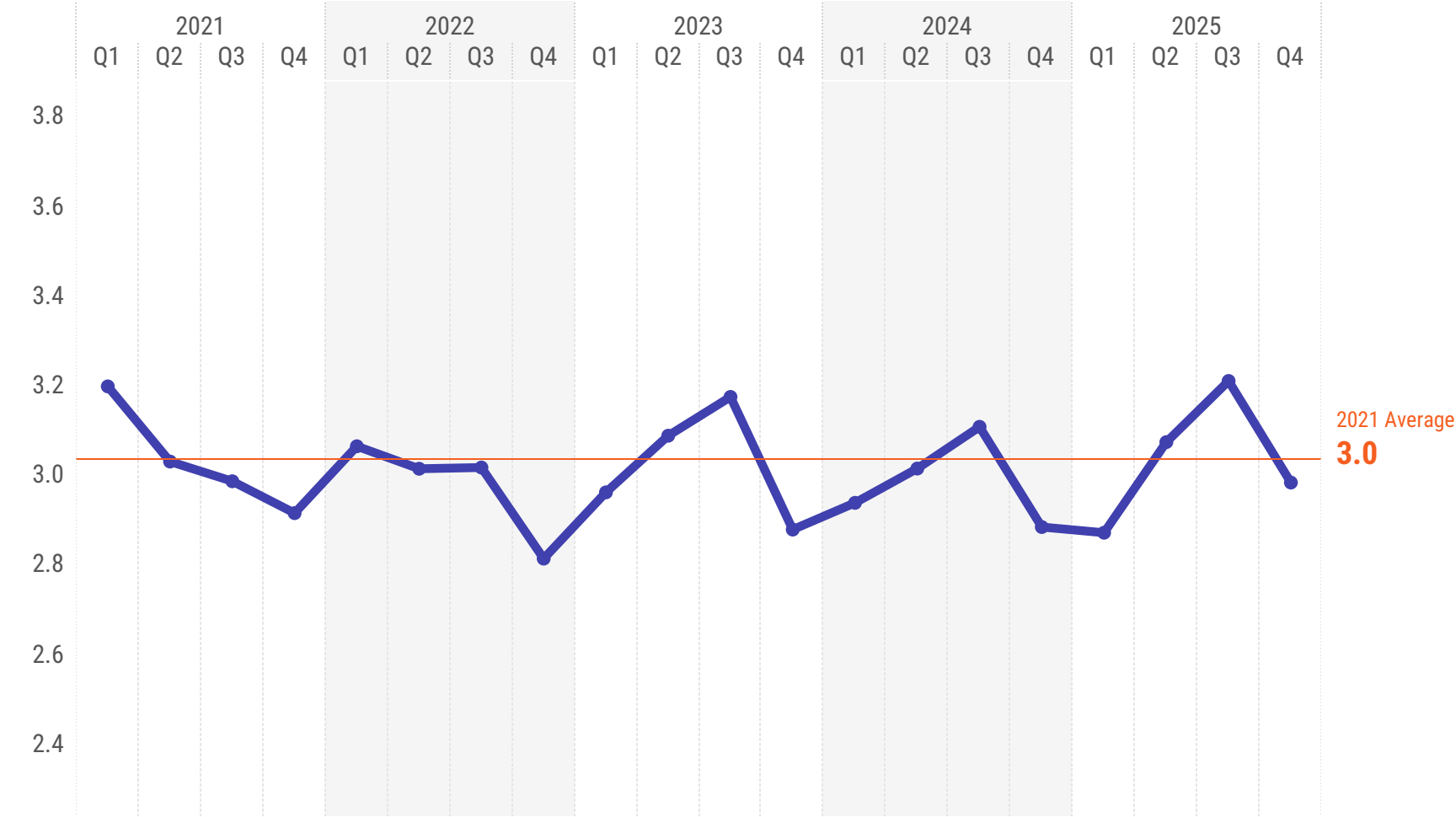


Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)

Since 2023, patient severity has followed a similar pattern, rise from Q1 to Q3, then falls in Q4 due to patient mix. In 2025, severity was the highest in five years.



Inpatient Case Mix Index (Patient Severity)



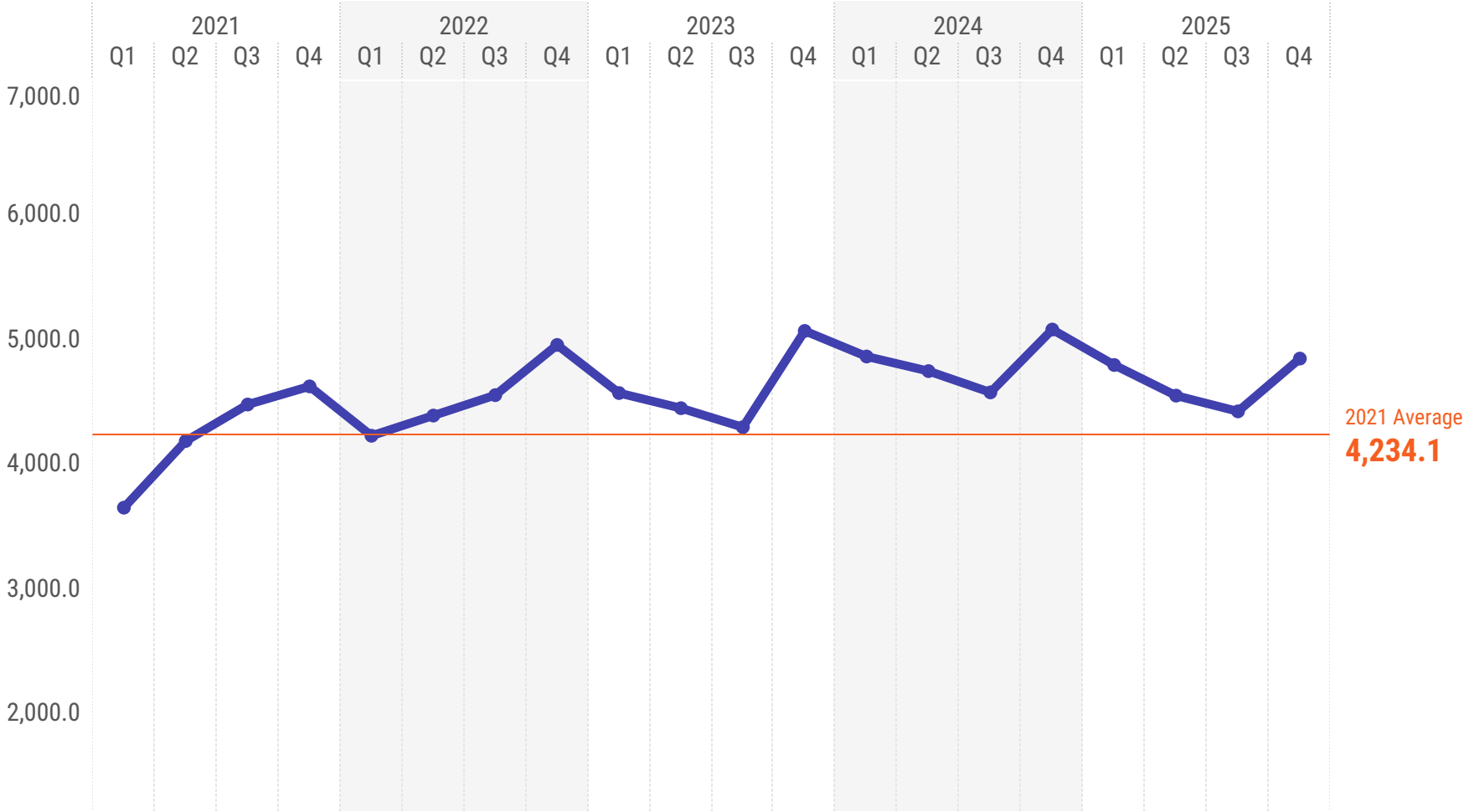
Q4-25 vs. Q3-25	-7.1%	
L12M vs. P12M		1.6%
L12M vs. 2021		0.2%

Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)

In 2025 versus 2024, inpatient and observation cases declined 3.4%. Despite this, cases are still 10% higher than 2021.



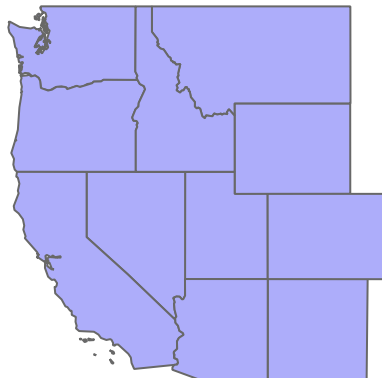
Total Inpatient and Observation Cases



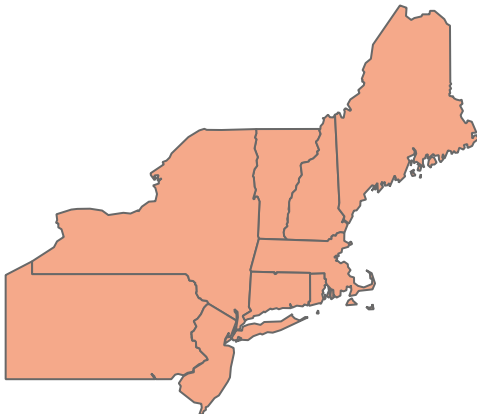
Q4-25 vs. Q3-25		9.6%
L12M vs. P12M	-3.4%	
L12M vs. 2021		9.9%

Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)

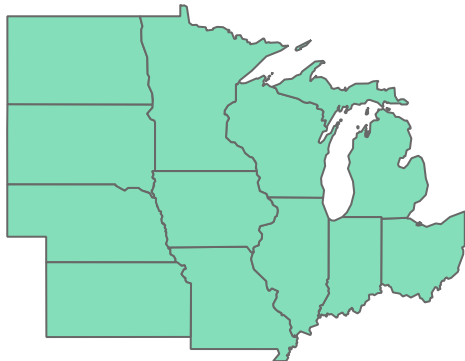
All regions saw lower inpatient and observation cases in 2025 versus 2024. Three regions declined less than 2.5%, while the South fell 7.7%.



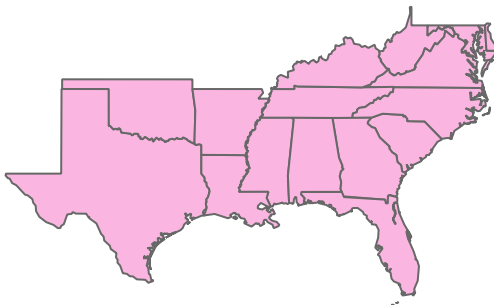
WEST Percent Change		
Q4-25 vs. Q3-25	7.4%	
L12M vs. P12M	-0.5%	
L12M vs. 2021	17.0%	



NORTHEAST Percent Change		
Q4-25 vs. Q3-25	11.3%	
L12M vs. P12M	-1.3%	
L12M vs. 2021	5.5%	



MIDWEST Percent Change		
Q4-25 vs. Q3-25	5.9%	
L12M vs. P12M	-2.5%	
L12M vs. 2021	12.4%	

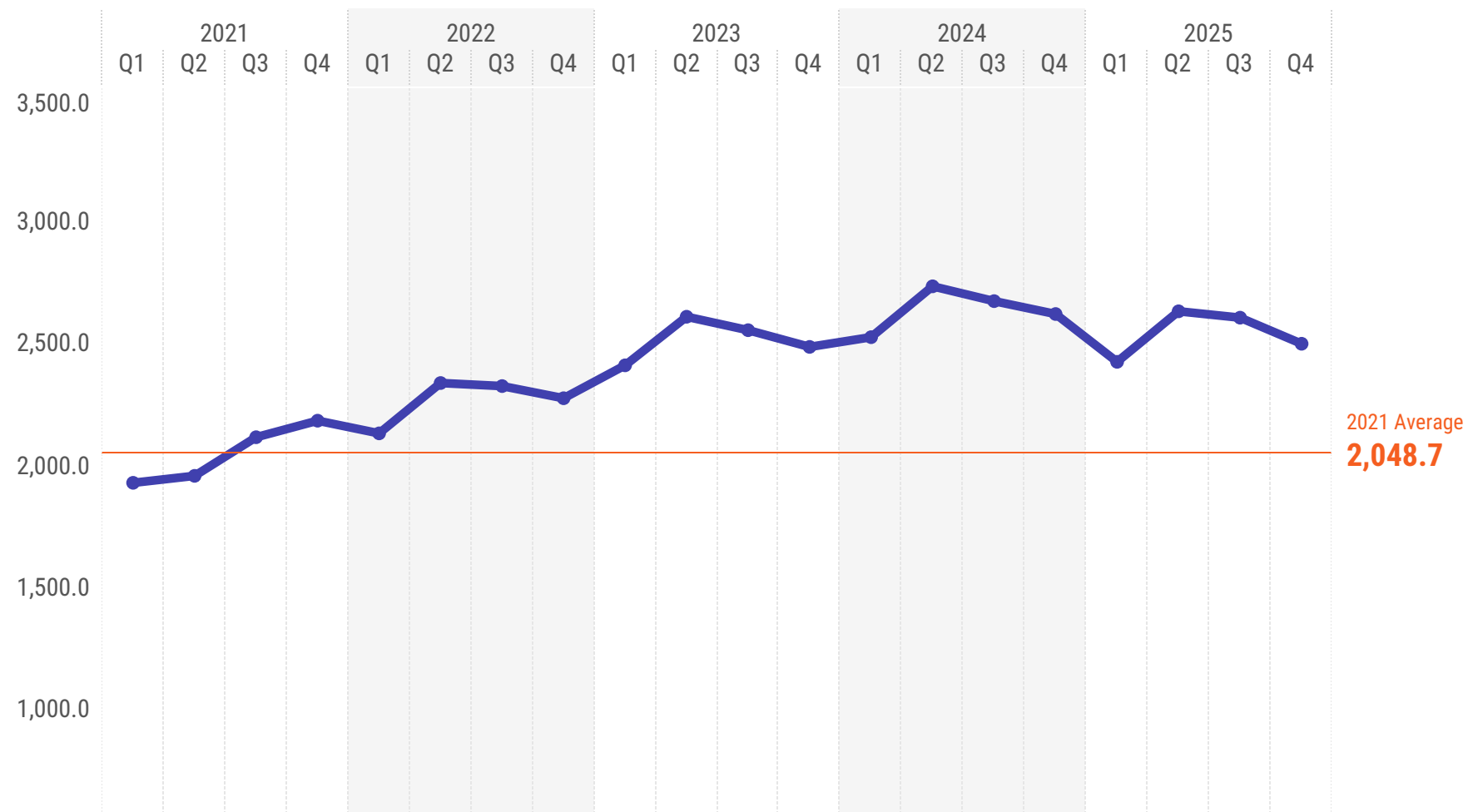


SOUTH Percent Change		
Q4-25 vs. Q3-25	12.9%	
L12M vs. P12M	-7.7%	
L12M vs. 2021	6.2%	

Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)

Surgery cases increased 24.1% from 2021 to 2025, but fell 3.7% versus last year.

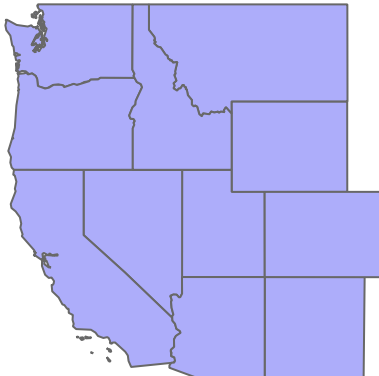
Surgery Cases



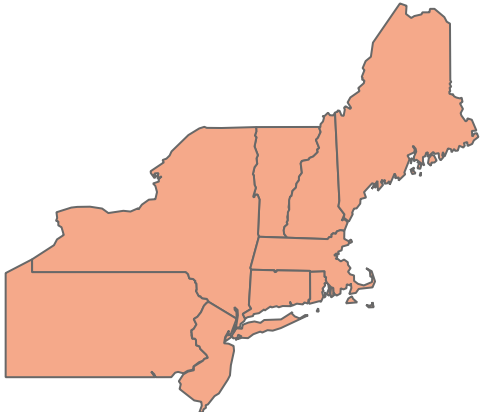
Q4-25 vs. Q3-25	-4.1%
L12M vs. P12M	-3.7%
L12M vs. 2021	24.1%

Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)

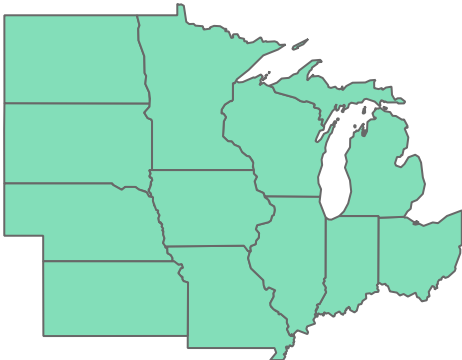
Surgical cases rose by at least 19% verse 2021 in all regions. Compared to 2024, most regions declined except the Northeast which remained unchanged.



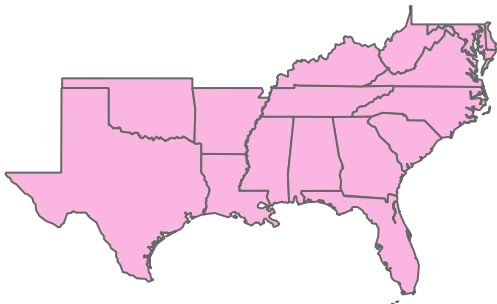
WEST		
Percent Change		
Q4-25 vs. Q3-25	-6.5%	
L12M vs. P12M	-5.2%	
L12M vs. 2021		19.1%



NORTHEAST		
Percent Change		
Q4-25 vs. Q3-25	-5.8%	
L12M vs. P12M	0.2%	
L12M vs. 2021		22.0%



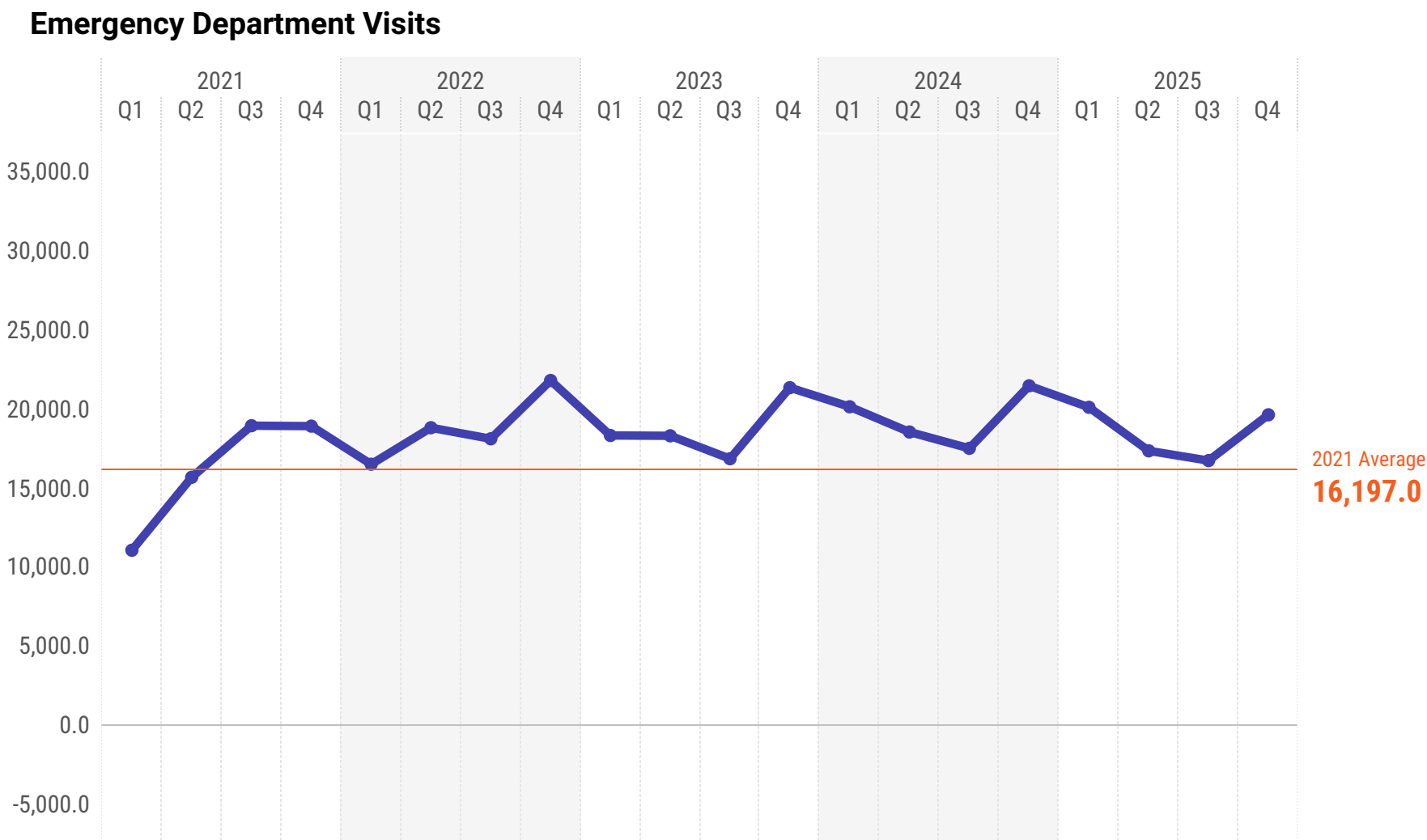
MIDWEST		
Percent Change		
Q4-25 vs. Q3-25	-3.8%	
L12M vs. P12M	-5.8%	
L12M vs. 2021		27.7%



SOUTH		
Percent Change		
Q4-25 vs. Q3-25	-2.2%	
L12M vs. P12M	-4.0%	
L12M vs. 2021		24.2%

Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)

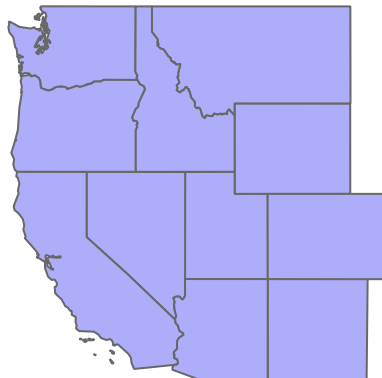
Emergency visits showed a consistent pattern over the past two years (Q1/Q4 higher, Q2/Q3 lower) and were down 4.9% versus 2024.



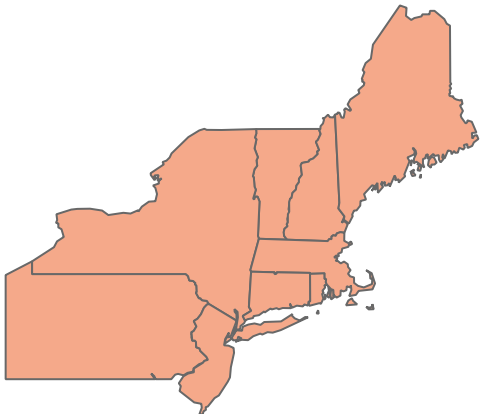
Q4-25 vs. Q3-25		17.2%
L12M vs. P12M	-4.9%	
L12M vs. 2021		14.2%

Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)

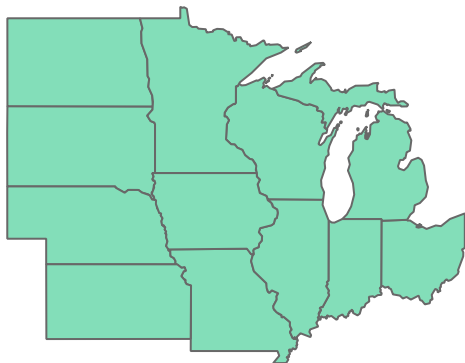
Emergency visits varied by region. Compared to 2024, South and Midwest declined the most, the Northeast was slightly lower, and the West increased.



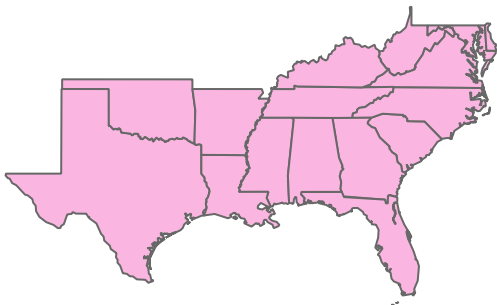
WEST Percent Change	
Q4-25 vs. Q3-25	14.7%
L12M vs. P12M	2.3%
L12M vs. 2021	31.9%



NORTHEAST Percent Change	
Q4-25 vs. Q3-25	19.9%
L12M vs. P12M	-0.9%
L12M vs. 2021	22.0%



MIDWEST Percent Change	
Q4-25 vs. Q3-25	12.1%
L12M vs. P12M	-7.3%
L12M vs. 2021	11.2%



SOUTH Percent Change	
Q4-25 vs. Q3-25	21.7%
L12M vs. P12M	-9.5%
L12M vs. 2021	6.5%

Q4-25 vs. Q3-25 | (10/01/25 - 12/31/25) vs. (07/01/25 - 09/30/25)
L12M vs. P12M | (01/01/25 - 12/31/25) vs. (01/01/24 - 12/31/24)
L12M vs. 2021 | (01/01/25 - 12/31/25) vs. (01/01/21 - 12/31/21)



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