

Questionnaire to Private Small-to-Mid-Size Hospitals in Japan: Key Research Findings 2017

◆ **Research Outline**

Yano Research Institute has conducted a study on the domestic private small-to-mid-size hospitals with the following conditions:

1. Research period: November to December 2017
2. Research objects: Private small-to-mid-size hospitals
3. Research methodologies: Mail survey

About Questionnaire to Private Small-to-Mid-Size Hospitals

Private small-to-mid-size hospitals in this research indicate those hospitals with the following conditions: 1) Equipped with 40 or more sickbeds, 2) Being medical corporations, 3) Being either subject of DPC/PDPS (Diagnosis Procedure Combination/Per-Diem Payment System) or of both inpatient hospital ward and hospital treatment management wards (type 1 and 2) based on the Integrated Community Care System. The research was conducted to and given responses by 47 private small-to-mid-size hospitals nationwide regarding the hospital management in November to December 2017. The same research had also been conducted in the year before.

◆ **Key Findings**

■ **“Lack of Personnel” Occupied 76.6% of the Problems and Challenges in Business Conditions of Small and Medium-Size Hospitals**

When asked about the problems and challenges that 47 small and medium-size hospitals nationwide currently face regarding business conditions, just like in the previous research, “Lack of personnel” was the largest number of responses gained, dominating 76.6% of the entire responses, followed by “Improvement in the rate of sickbeds used” occupying 59.6%. The next were “deterioration of buildings” and “Coping with Revision of Medical Fee/Long-Term Care Fee Payment System” both of which accounted for 46.8%. When compared with the research conducted last time, the responses from the hospitals changed in the following items: “Improvement in the rate of sickbeds used” largely increased by 32.9 points, “Collaboration of Hospitals and Practitioners in Clinics” rose by 18.7 points and “Decline of population” fell by 19.2%.

■ **Only 40 % of Private Small-to-Mid-Size Hospitals Proactive about In-Home Medical Care**

When questioned to 47 private small-to-mid-size hospitals nationwide about the attitude toward in-home medical care, the response that occupied the largest was “Being proactive about in-home medical care” which accounted for 44.7%, followed by the response “Cannot say which” that accounted for 31.9%, and the next came “Being negative about in-home medical care” that accounted for 21.3%. Although the government has been pressing ahead with Integrated Community Care System, those private small-to-mid-size hospitals which answered that they have proactively tackling in-home medical care ended up with 40%, the rate has not been changed from the last research.

■ **60% of Private Small-to-Mid-Size Hospitals Responded No Need for Revision of Bed Classification based on Community Health Care Vision**

When questioned to 47 private small-to-mid-size hospitals nationwide about the changes in the medical functions of hospital beds as a part of Community Health Care Vision, 63.8% of the hospitals responded that “No need for revision of classifying sickbeds” at their hospitals. In addition, the response to the question “Revision of classifying beds needed” accounted only for 21.3%. These results seem to indicate that many private small-to-mid-size hospitals do not wish large changes in the current conditions.

◆ **Report Format:**

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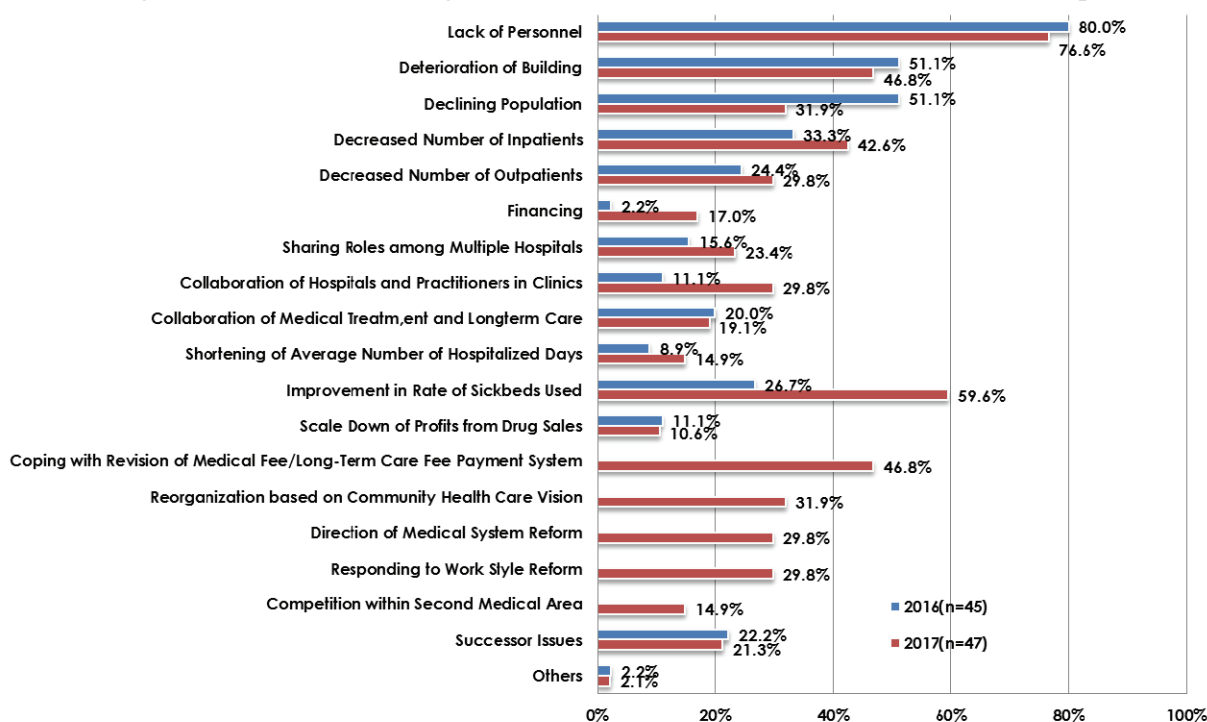
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■ **Figure 1. Problems/Challenges in Business Conditions for Small-to-Mid-Size Hospitals**

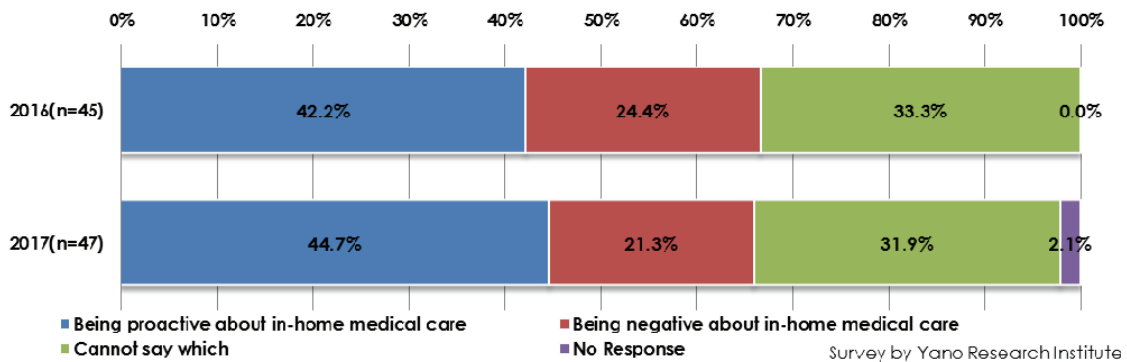


Survey by Yano Research Institute

Notes:

1. Latest Research Conducted: Period: November to December, 2017; Research Subject: 47 private small-to-mid-size hospitals nationwide; Methodology: Mailed questionnaire; multiple responses allowed. Previous Research Conducted: Period: November to December, 2016; Research Subject: 45 private small-to-mid-size hospitals nationwide; Methodology: Mailed questionnaire; multiple responses allowed.

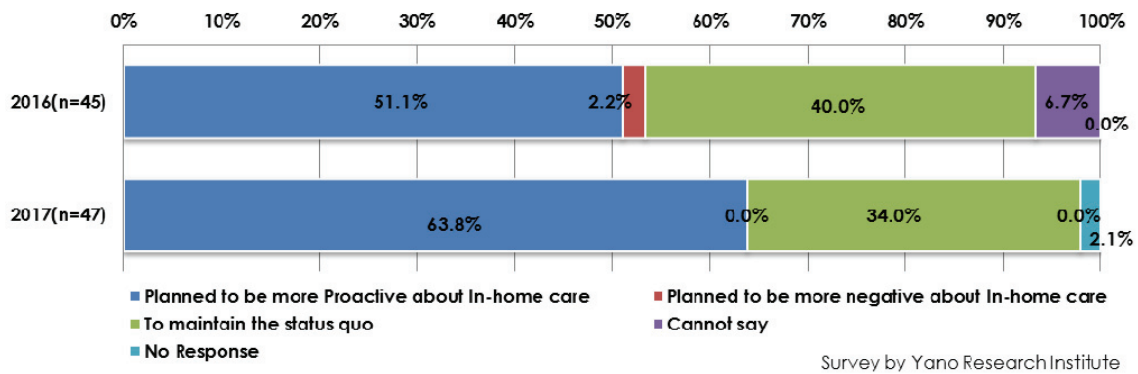
■ **Figure 2. Handling of In-Home Medical Care**



Notes:

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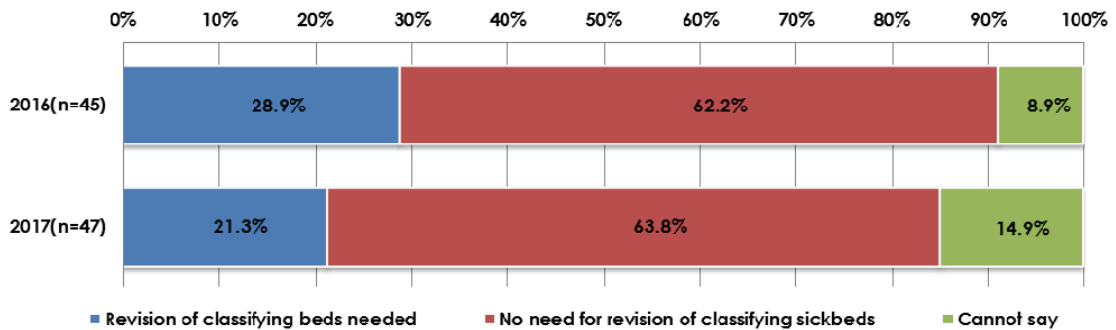
■ **Figure 3. Future Handling of In-Home Medical Care**



Notes:

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■ **Figure 4. Whether Re-specifying Medical Functions of Hospital Beds Needed, According to Community Health Care Vision**

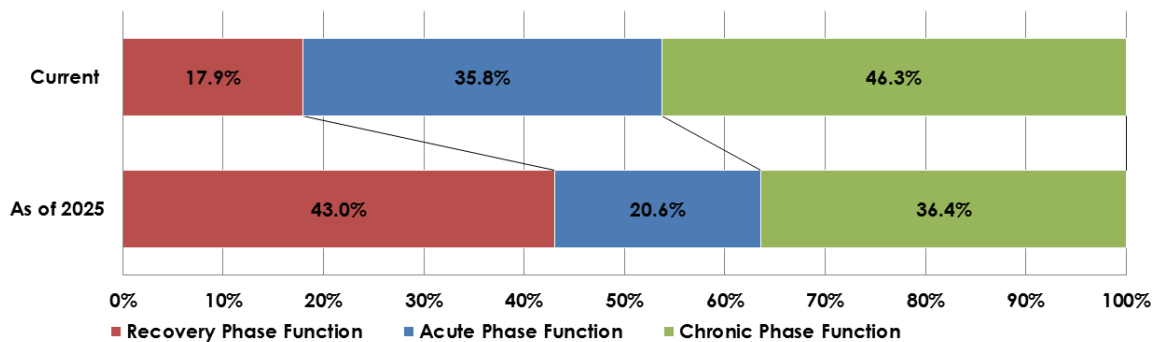


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■ **Figure 5. Future Medical Functions of Hospital Beds by 2025**



Survey by Yano Research Institute

Notes:

- Research Period: November to December, 2017; Research Subject: Sickbeds at 10 out of 47 private small-to-mid-size hospitals nationwide which responded that reconsideration in classifying of sickbeds necessary; Methodology: Mailed questionnaire; Calculated by totaling the number of sickbeds by functional division at 10 facilities, and summarized into a composition ratio.