

2025 Trends Report

Key Trends Redefining Healthcare

Empowering People, Place, and Technology



 Kimball International

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Aligning Spaces with the New Realities of Healthcare

The way care is delivered is rapidly evolving—and so must the environments that support the people who provide it and the patients they serve. From decentralized models to data-driven decision-making, healthcare spaces are being asked to do more: **adapt faster, operate smarter, and respond with deeper empathy.**

This report explores the key trends shaping healthcare in 2025 and the deeper insights behind them. Our focus is on the real-world forces driving change and what they mean for the future of healthcare environments.

These shifts aren't just shaping new demands, they're opening the door to more responsive and human-centered design. At Kimball International, we see these shifts not as challenges to react to but as opportunities to design for what comes next. Because we believe that when healing spaces align with the realities of healthcare work, they empower everyone at the heart of care.

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What's Driving Change

The healthcare industry in 2025 is undergoing a profound shift toward greater integration. Financial pressures are driving hospitals and health systems to consolidate in order to reduce costs and maintain operations. Mergers and acquisitions are concentrating care within larger systems and reducing the number of independent providers. While this can improve efficiency, it also raises concerns about patient access and health equity.

At the same time, artificial intelligence (AI) is transforming care by streamlining workflows, supporting clinical decisions, and personalizing treatment. As hospitals adopt AI, they must carefully balance the benefits of technology with the need to preserve the human connection that is essential to healing.

Beyond technology, healthcare continues to move toward a whole-person approach that recognizes the connections between physical, mental, and social well-being. There is also growing recognition that human health is closely tied to the health of the planet. Hospitals are beginning to incorporate environmental considerations into care through sustainable design, greener operations, and community-based strategies. These are not just ideals; they are critical for resilience during climate events and future health crises.

Still uncertainty remains. Political shifts could reshape regulations, funding, and payment models. Although integration is the prevailing trend today, policy changes could accelerate it or reverse it. As a result, the industry is cautiously adapting by managing costs, embracing technology, and aligning environmental and human health.

Amid all of this, how and where healthcare work gets done is being fundamentally reimagined.



Healthcare at a Crossroads: Key Dynamics in 2025

Consolidation: Health systems are merging rapidly, lowering costs but threatening care access and equity.

AI & Automation: Technology is transforming care delivery, but human connection must remain the heart of healing.

Whole-Person Care: Mental, emotional, and social health are becoming care priorities along with physical health.

Sustainability: Planetary health directly impacts public health, making eco-conscious practices no longer optional.

Policy Uncertainty: Shifting regulations and funding models are forcing the industry to evolve with caution.



New Patterns of Practice

Trends Redefining Care

Care is being delivered in new ways, in new places, and for new reasons. These eight trends highlight how healthcare work is shifting in response to new pressures, expectations, and possibilities.

1. Seeing the Full Patient Picture

Care teams now focus on treating the whole person versus symptoms, considering social, behavioral, environmental, and tech factors—for more holistic, personalized care.

2. The Self-Empowered Patient

With wearables and access to digital records, patients are more informed and engaged, shifting care to a collaborative model.

3. “Uber for Nursing”

Healthcare staff are embracing flexible schedules and remote tasks, with many clinics adjusting hours to support work-life balance and improve retention.

4. Connecting the Data Dots

Better tech and data sharing across providers and systems are making care more connected and improving community outcomes.

5. Connecting Health and Home

From virtual visits to integrating affordable housing into health campuses, care is connecting to home environments, meeting people where they are and helping them stay there longer.

6. New Types of Learning Spaces

Healthcare environments are expanding their role in education, with teaching kitchens, broadcast rooms, and training centers helping patients learn about wellness and lifestyle changes. At the same time, hospitals are adding research facilities to speed the connection between discovery and patient care.

7. From Mega-Districts to Micro-Clinics

Care models are expanding both ways—from large, all-in-one health districts to small, local clinics in retail stores, workplaces, and everyday public spaces.

8. Design for Safety of Body and Mind

Healthcare spaces are increasingly guided by trauma- and neuroscience-informed design, with features like clear sightlines, soft barriers, and discreet exits to enhance both emotional comfort and physical safety.





1 Seeing the Full Patient Picture

INSIGHT

Healthcare is broadening its view of what it means to care for a person. Climate, pollution, and hospital emissions are now recognized as health risk factors. At the same time, social determinants such as access to food, housing, transportation, and mental health support are becoming part of care strategies, and even insurance coverage. Mental health is being more fully integrated into primary care, with pop-up clinics and therapies rooted in brain science expanding access. Technology is also playing a growing role: wearables are making prevention easier, and new policies are giving patients more control over their own health data. All of this is reshaping care into a more connected, proactive, and personalized system that considers the complete picture of each patient's well-being.

Key Shifts

- From symptom-focused treatment to a whole-person approach that addresses social, environmental, and behavioral factors, including housing support, food access, and mental health care
- From reactive care to proactive prevention enabled by wearables and greater control of personal health data
- From siloed systems to stronger collaboration across hospitals, insurers, tech companies, and policymakers to support long-term, holistic wellness



of degree-level public health programs require climate and health education as part of their required curriculum.

GCHE & Lancet Planetary Health Survey, December 2024



Harvard Medical School is adding climate change to its curriculum to prepare future physicians for its health impacts.

Why It Matters

When hospitals address social, environmental, and behavioral factors like nutrition, mental health, and sustainable design, they can improve patient outcomes and strengthen their financial health, especially as value-based care becomes more widespread. This more proactive, preventative approach also helps health systems stay resilient as regulations and reimbursement models continue to evolve.



DESIGN IMPLICATIONS

Make space for whole-person care.
While clinical spaces will remain essential, lifestyle-supportive environments are becoming “must-haves.” This shift will drive demand for furniture that combines durability with hospitality aesthetics, such as café seating that accommodates both standard and hip chairs without sacrificing design.

Create human-centered environments.
Create spaces that feel less institutional and more personal by supporting comfort, dignity, and trust while offering a variety of experiences like reading nooks, TV viewing areas, child-friendly corners, and respite spaces.

Support value-based care.
Thoughtful design can help improve patient experiences and outcomes, reinforcing the goals of value-based care models.

Design for resilience.
Sustainability is no longer optional. Facilities must be built to withstand climate-related disruptions and increasingly function as multi-use spaces for local communities



Key Shifts

- From hard-to-access health records to easier, more transparent access through updated HIPAA policies
- From one-size-fits-all advice to tailored insights powered by wearables and AI
- From reactive care to on-demand, personalized, and proactive care through longevity subscriptions and concierge models that are growing in popularity.
- From high public trust in traditional healthcare systems to growing skepticism and increased reliance on alternative, consumer-driven healthcare options



1 in 3

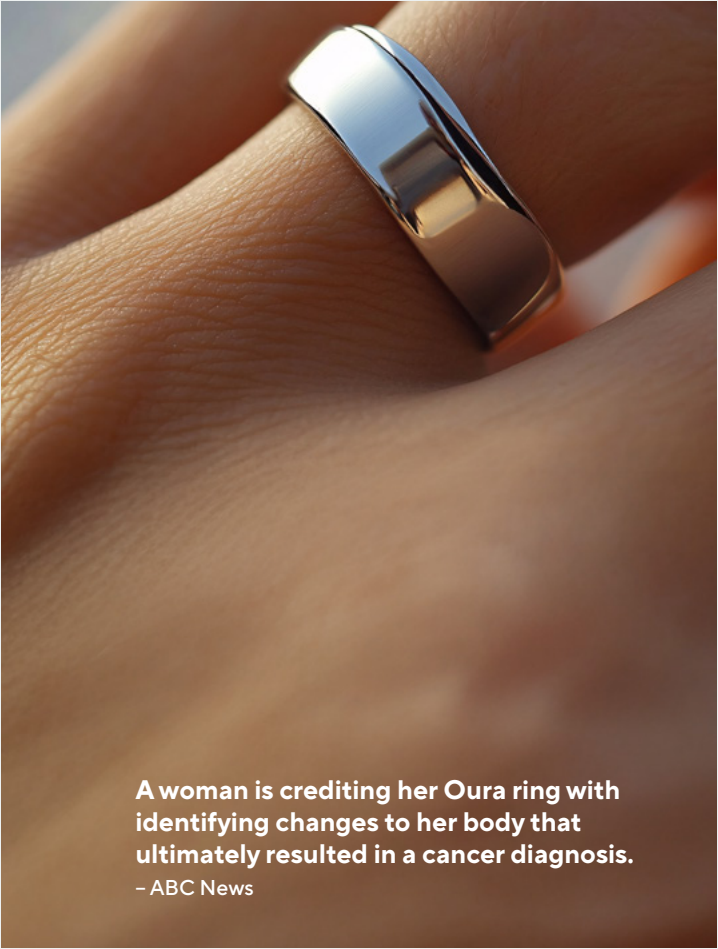
Americans use wearable devices, such as a smart watch or band, to track their health and fitness. More than 80% would share information from their device with their doctor to support health monitoring.

Health Information National Trends Survey, 2023

2 The Self-Empowered Patient

INSIGHT

Patients are taking a more active role in their health, driven by easier access to data, smarter AI tools, and models like concierge care. Updated HIPAA laws and AI are making health records more useful and personalized, reshaping the doctor-patient relationship. As trust in traditional systems fades, some people are turning to subscription care and longevity clinics that feel more responsive to their individual needs. Preventative care is becoming a lifestyle, with AI predicting trends and guiding early interventions. With rising out-of-pocket costs, care that’s convenient, personalized, and worth the investment is more in demand than ever.



A woman is crediting her Oura ring with identifying changes to her body that ultimately resulted in a cancer diagnosis.
– ABC News

Why It Matters

As patients become more informed—and sometimes misinformed—they may request specific tests or treatments based on personal research or self-diagnosis. This can lead to frustration when providers cannot justify or fulfill requests that don't align with clinical evidence. The traditional model of passive patient compliance is shifting toward a more collaborative relationship. Addressing this dynamic requires shared decision-making and care tailored to each person's needs and understanding.



DESIGN IMPLICATIONS

Design for real-time well-being.

As real-time health insights become more accessible, the design of spaces and furniture will face greater scrutiny. With patient experiences now measurable and monitored, the bar for accountability in healthcare design is rising.

Extend care beyond the clinic.

Design for care settings in everyday environments like gyms, retail stores, and pop-up locations that meet people where they already are.

Empower collaborative care.

Research shows screen placement in exam rooms impacts engagement—when patients can see and interact with their data, they feel more in control. As personal tech advances, waiting rooms must evolve into active spaces that support sharing personal health data and foster collaborative care.

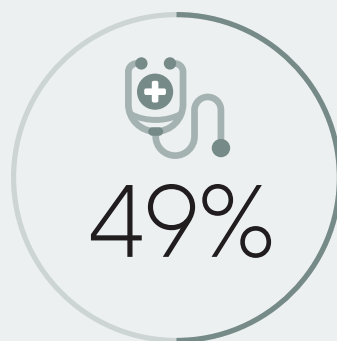
3 “Uber for Nursing”

INSIGHT

Hospitals are testing gig-style staffing models that give nurses more flexibility—like choosing shifts that fit their schedules or working across units through float pools. These options support better work-life balance but come with challenges. Gig nurses may miss out on training, support, and familiarity with protocols, raising concerns about safety, accountability, and workforce stability as many trade steady roles for greater control.

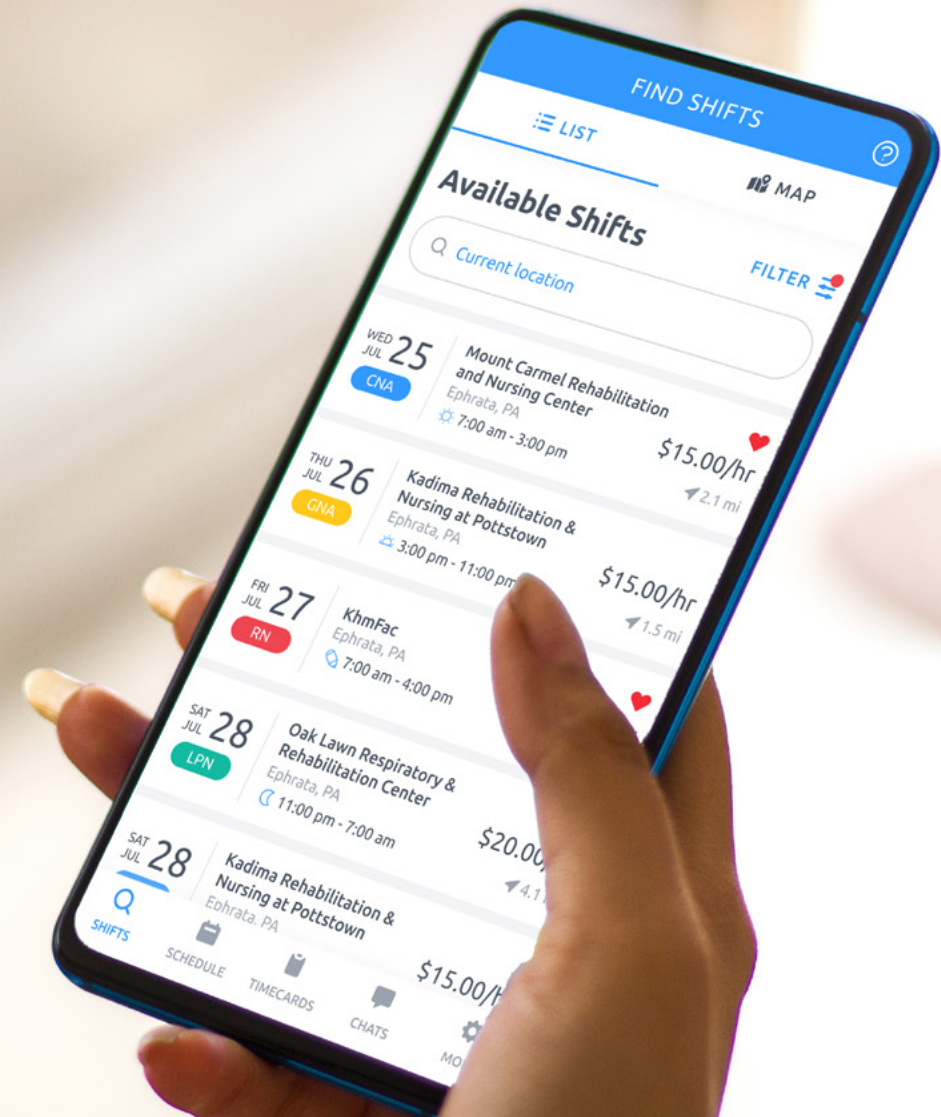
Key Shifts

- From set schedules to nurse-selected shifts with more flexibility
- From full-time roles to gig-style, on-demand staffing
- From structured onboarding to limited training and unfamiliar protocols for gig nurses
- From consistent team-based care to more fragmented staffing models with less continuity
- From steady compensation to trade-offs between pay and schedule control



of hospital executives say their facilities aren't equipped for current patient volumes, fueling interest in flexible staffing. With only 29% citing cost concerns, most support investing in new, on-demand models.

FTI Consulting, Healthcare and Life Sciences Hospital Operations Outlook Survey 2024



Using the gig model and the app to improve staffing, Mercy shifted to a virtuous cycle where appropriate staffing improves patient care and nurse retention.

Why It Matters

As gig-style nursing becomes more common, healthcare leaders must find the right balance between flexibility and consistency. Supporting this shift means rethinking not just staffing, but also training, daily workflows, and the physical environment. That could include investing in tools like on-demand education, streamlining workflows, and creating intuitive spaces that help transient staff get up to speed quickly, so care stays safe, high-quality, and patient-centered.



DESIGN IMPLICATIONS

Empower efficiency.

Design for rotating shifts with intuitive layouts and clear signage that reduce confusion and speed up orientation.

Prioritize flexibility and universal use.

Design with mobile workstations and adaptable layouts that can accommodate changing roles and preferences.

Design with first-timer empathy.

Create spaces that are immediately understandable, even to those unfamiliar with the facility or workflow.

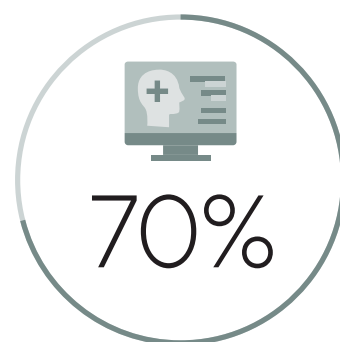
4 Connecting the Data Dots

INSIGHT

Healthcare is getting smarter and more connected, making it easier for patient information to move quickly and securely between systems and providers. In 2024, new tech like FHIR-based APIs (think of them as secure digital bridges) helped electronic health records (EHRs) talk to each other more easily. At the same time, new regulations are pushing healthcare systems to share data in a way that's more standardized, secure, and accessible. The goal? To give care teams a more complete picture of a patient's health, support better coordination, and make care more proactive and personalized. As this data becomes easier to connect across platforms and providers, healthcare is headed toward smarter decisions, stronger outcomes, and better public health overall.

Key Shifts

- From siloed systems and disconnected records to unified, real-time access to patient data across platforms
- From delayed decision-making based on incomplete information to proactive, data-informed care powered by AI and predictive insights
- From disparate clinical and lifestyle data points to a more holistic view of health that includes medical and social factors
- From spaces designed for outdated workflows to flexible environments built for tech access, teamwork, and mobility



of hospitals that routinely engaged in interoperable exchange reported that clinicians often used clinical information available electronically from outside providers when treating patients.

Gabriel MH, Richwine C, Strawley C, Barker W, Everson J. Interoperable Exchange of Patient Health Information Among U.S. Hospitals, 2023



An AI model developed by Northwestern Medicine investigators improved the transformation of EHR data into standardized health resources more efficiently than current methods.

Why It Matters

When systems can talk to each other, care only gets better. Interoperability gives providers instant access to accurate, up-to-date patient information, helping them make faster decisions, reduce errors, and provide more personalized care. With AI and predictive tools layered in, it can also help forecast risks, improve workflows, and create a more efficient healthcare experience from start to finish.



DESIGN IMPLICATIONS

Support enhanced teamwork.

Design must support seamless collaboration across health disciplines, with shared work areas, meeting rooms, and staging zones that enable on-demand insights from real-time data.

Make data access effortless.

As virtual care and AI monitoring of high-risk inpatients and outpatients increase, remote dashboard monitors and command centers will likely become an essential part of the design of healthcare environments.

Design for adaptability.

Many hospitals are evaluating whether to keep in house data centers or move to a hybrid model. If hospitals move data infrastructure off site or in the cloud, formerly dedicated data center space will need to be transformed into revenue generating or patient experience environments.

5 Connecting Health and Home

INSIGHT

Faster than ever, healthcare is moving toward more home-based care. More people want to age in place, and hospital-at-home programs are proving they can deliver safe, effective care beyond traditional settings. Over 360 hospitals now participate in CMS's Acute Hospital Care at Home initiative, showing strong outcomes and patient satisfaction.

At the same time, health systems are recognizing that stable housing is essential to long-term health. Some, like UnitedHealth Group, are investing in affordable housing with on-site health services.

Combined with smart home technology and new aging-in-place innovations, the lines between healthcare and home are blurring. Together, these shifts point to a more personal, local, and supportive future—meeting people where they live and promoting dignity, independence, and whole-person well-being.

Key Shifts

- From separate systems to integrated spaces that combine affordable housing and access to care
- From episodic treatment that happens in clinical settings to ongoing, preventive care built into everyday life
- From clinical, institutional settings to warm, human-centered spaces that feel like home



366
Hospitals



38
States



31K
Patients

Launched in 2020, the CMS Acute Hospital Care at Home (AHCAH) initiative delivers hospital-level care in patients' homes. As of October 2024, 366 hospitals in 38 states have served over 31,000 patients. Studies show these patients experienced lower mortality and fewer complications than those treated in hospitals for similar conditions.

American Hospitals Association, Center for Health Innovation Market Scan, April 2024



Why It Matters

This shift isn't just about investing in new technology, it's about creating new types of spaces that support ongoing and preventative care as part of a lifestyle approach. As non-clinical factors like food, housing, and social support become more central to addressing well-being, care is increasingly extending beyond hospital walls, reaching into communities and homes. To keep up, the built environment must blend seamlessly into daily living, making access to care more intuitive, flexible, and human-centered.



DESIGN IMPLICATIONS

Prioritize comfort and dignity.

Blend residential aesthetics with accessible features to create spaces that feel safe, familiar, and empowering, supporting aging in place and whole-person well-being.

Make flexibility the default.

Design with adaptable, modular solutions that can be easily moved, adjusted, or stowed in various home environments, from small apartments to shared housing.

Bridge health and home.

Create hybrid spaces that support both clinical care and everyday living with ease.



6 New Types of Learning Spaces

INSIGHT

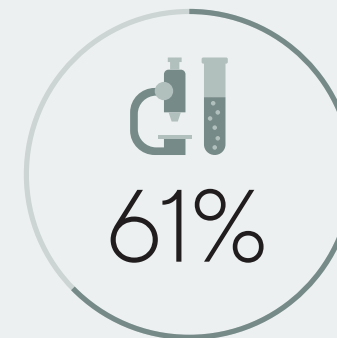
Healthcare spaces are evolving into dynamic hubs for learning, research, and community connection. Hospitals are no longer just for treatment—they're places where people build healthy habits and engage in wellness. Teaching kitchens, studios, labs, and training centers empower patients and support lifestyle change.

Houston Methodist's HEAL Wellness Center, with its teaching kitchen and classroom, reflects this shift toward spaces designed for education and self-care. At the same time, hospitals are integrating research facilities to bring lab discoveries quickly to the bedside.

By embedding learning into care environments, health systems are creating smarter communities and a more proactive, informed approach to wellness.

Key Shifts

- From hospitals as treatment-only facilities to hospitals as centers for learning, prevention, and innovation
- From off-site research disconnected from care to integrated research labs that bring discoveries closer to patient care
- From passive waiting spaces and exam rooms to active and integrated learning environments like teaching kitchens, group therapy rooms, and community training spaces



of HealthPartners' senior strategy leaders say they've seen stronger connections between their work and the HealthPartners Institute (part of a system advancing care through research, education, and practice), highlighting how embedded research and education can drive systemwide alignment and impact.

EJM Catalyst, "A Learning Health System to Generate and Accelerate Innovation: The HealthPartners Institute," May 2024



Why It Matters

Healthcare today is no longer just about delivering treatment, it's about empowering people to understand and manage their health every day. As hospitals evolve into education hubs, there's a powerful opportunity to redefine the patient journey with spaces that support learning, lifestyle changes, and proactive habits that lead to long-term wellness.



DESIGN IMPLICATIONS

- Enable multipurpose use.**
Create flexible environments that easily transition between group classes, one-on-one learning, and community engagement.
- Purposefully integrate technology.**
Equip learning environments with AV tools, interactive displays, and streaming capabilities to support hybrid learning and communication.
- Promote healthy habits.**
Incorporate spaces like teaching kitchens, movement rooms, or quiet zones to encourage long-term wellness behaviors.

7 From Mega-Districts to Micro-Clinics

INSIGHT

Healthcare is expanding in two very different but equally important directions. On one end of the spectrum, large health systems are creating “whole-health” campuses that combine hospital care with mental health services, fitness centers, research facilities, affordable housing, and even job training, all in one place, to address the medical and social factors shaping wellness. For example, Kaiser Permanente’s new 20-acre health village in Atlanta includes job training and nutrition programs, highlighting how care is becoming more holistic and community-focused. At the same time, care is getting more hyper-local and convenient. Health systems are placing mini-clinics in everyday settings like grocery stores, office parks, and public libraries to improve access and reduce stigma. In 2024, Walmart introduced chronic-disease kiosks in 500 stores, allowing patients to consult with specialists virtually while shopping. Both approaches, mega-campus for complex needs and micro-clinics for convenient, everyday access, ensure people can get the right care in the right place.



Key Shifts

- From siloed medical services to holistic environments offering care, education, and social support under one roof
- From patient journeys that begin in waiting rooms to care that initiates in everyday places like grocery stores, workplaces, and libraries
- From rigid one-size-fits-all facilities to flexible, modular clinics that fit into nontraditional spaces and adapt to community needs

Why It Matters

As care delivery expands across both large “whole health” campuses and smaller neighborhood sites, partnerships are helping healthcare systems reach more people in more meaningful ways. From placing a diabetes screening kiosk in a retail pharmacy to embedding a behavioral health counselor in a local library, these collaborations are reshaping how and where care happens. For systems focused on value-based care, working together isn’t just forward-thinking—it’s essential to amplifying impact.



DESIGN IMPLICATIONS

Balance privacy and openness.

Design healthcare environments within nontraditional settings that feel approachable while meeting clinical expectations for privacy, safety, and credibility.

Ensure brand consistency.

Maintain a cohesive design language that reflects the health system’s brand, even in compact or shared-use environments.

Allow for future-proofing.

Develop modular, adaptable spaces that can quickly adjust to meet shifting care needs driven by real-time population health data.



8 Design for Safety of Body and Mind

INSIGHT

Healthcare environments are being reimagined to protect not just physical safety, but emotional and psychological well-being as well. In 2024, a rise in workplace violence, growing staff burnout, and a national focus on mental health pushed trauma-informed and neuro-informed design into the mainstream. These strategies, once considered specialized, are now commonly used to create calmer, more supportive environments through elements like sensory modulation rooms, clear sightlines, and soft architectural barriers. At the same time, the increasing use of psychedelic therapies is challenging designers to create emotionally intelligent spaces that feel grounding, secure, and adaptable to altered sensory experiences. Legislative movements like the SAVE Act and waves of healthcare worker strikes have further spotlighted the urgent need for safer, more thoughtful care environments that protect both body and mind for patients and caregivers.

Key Shifts

- From staff safety as an operational concern to staff safety as a design priority that's essential to retention and well-being
- From alternative therapies considered as fringe treatments to the normalization of psychedelic treatments that require intentionally designed healing spaces
- From limited use of trauma-informed strategies to widespread adoption of trauma- and neuro-informed design in healthcare settings
- From relying on policies alone as solutions to using design as a proactive approach to emerging safety and mental health challenges



81% of nurses faced workplace violence last year, underscoring the need to prioritize physical safety alongside mental well-being in healthcare.

National Nurses United Survey, 2023

Why It Matters

In today’s high-pressure healthcare environments, physical safety and mental well-being are closely linked and must be addressed together. Meeting code compliance is no longer enough—spaces must reduce triggers, prevent escalation, and support emotional recovery. Features like sensory rooms and decompression zones can mean the difference between coping and crisis for patients and staff. Designing for emotional and physical safety is not just compassionate care; it’s a strategic investment in retention, resilience, and a better patient experience.



DESIGN IMPLICATIONS

- Shape behavior with furniture.**
Use shelter-style lounge chairs and high-back seating to create safe, non-institutional boundaries that support comfort and subtle separation.
- Guide flow, reduce friction.**
Arrange furniture in curved or angled layouts to support natural movement and subtly separate high-risk individuals.
- Design for decompression.**
Include sensory rooms and staff respite areas to support recovery and reduce burnout after high-stress moments.
- Foster calm through sensory cues.**
Incorporate soft materials, biophilic elements, and warm lighting to promote emotional regulation.



Designing For Connected, Human-Centered Care

Across all eight trends, one truth is clear: healthcare design is no longer just about solving for space—it's about anticipating human needs in all their complexity. Whether addressing demographic shifts, behavioral health challenges, new care models, or emerging technologies, healthcare organizations must create environments that are flexible, inclusive, emotionally intelligent, and attuned to both patients and care teams.

These insights show that great design doesn't wait for change—it shapes it. By designing for **adaptability, well-being, and equity**, the healthcare design community can help build systems that are not only more efficient but also more human.



Insight #1: Shift from Symptoms to Systems

Healthcare is shifting from treating symptoms to addressing the broader social, environmental, and emotional systems that shape health. This shift calls for a holistic and more personalized approach that improves health and supports value-based care.

Insight #2: Design for Autonomy and Access

Patients are taking a more active role in their health, supported by digital tools, accessible records, and personalized care options. Care models must now support convenience, customization, and shared decision-making.

Insight #3: Adapt Spaces for Caregiver Agility

Flexible, gig-style staffing models are reshaping hospitals, driven by demands for better work-life balance. This creates new challenges for training, patient safety, and care consistency. Spaces and workflows must be redesigned to support a more fluid workforce.

Insight #4: Support Synergy and Interoperability

Healthcare data is becoming more connected and shareable in real time, driven by technology advancements and regulations. Purposeful design can help care teams access complete data faster, reducing errors and improving care.

Insight #5: Bring Care to Closer to Life

Care is moving beyond hospitals into homes, driven by tech, hospital-at-home models, and a focus on long-term wellness. Care environments must become more flexible and human-centered to meet people where they are.

Insight #6: Empower Through Education

Hospitals are becoming learning hubs that are teaching patients, staff, and communities to better manage health. This focus on prevention and innovation requires spaces like teaching kitchens, labs, and studios to support engagement and smarter care.

Insight #7: Expand Access at All Scales

Healthcare is growing in two directions: large campuses for complex needs and micro-clinics for everyday care. This dual approach helps systems reach more people, reduce disparities, and deliver care that fits daily life.

Insight #8: Prioritize Emotionally Intelligent Design

With a rising focus on mental health and workplace safety, design must now support emotional as well as physical well-being. Trauma-informed layouts and sensory spaces are essential to safer, more supportive care environments.

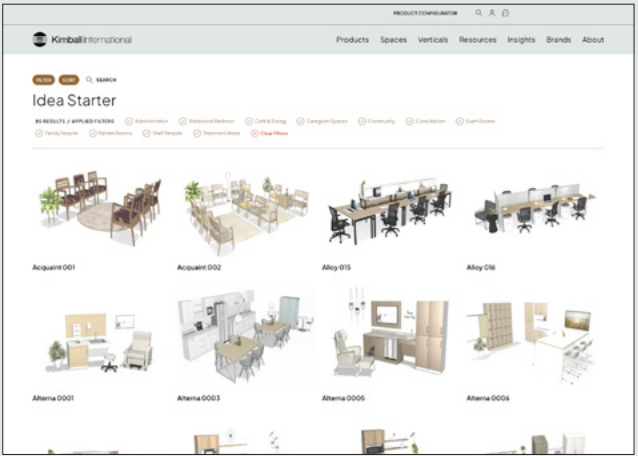


More Resources to Continue the Journey

The future of healthcare is complex, rapidly evolving, and full of opportunity. To help you stay ahead, we've curated a selection of resources that dive deeper into the trends shaping care delivery, design, and innovation.



Alternative Design
Episode 31,
Home as Your
Healing Partner



**Healthcare Spaces
& Applications Idea
Starters**



**Creating Places
to Belong in
Healthcare CEU**



**The Future of American
Healthcare Delivery**



