

# The Experience Gap: A Growing Threat To Healthcare's Bottom Line



## Strengthening Financial Stability Through Brand And Experience Design

**Healthcare organizations are navigating rising costs, tighter margins, and increasing competition for patients.** At the same time, reimbursement models are shifting toward value-based care, placing greater emphasis on patient experience, engagement, and outcomes. In today's healthcare landscape, how patients perceive and experience care increasingly shapes where they seek treatment and whether they return. Organizations that invest in thoughtfully designed patient-centered environments that reflect their mission and values strengthen trust, improve experience metrics, and create a more stable foundation for long-term financial performance.



# Experience and the Economics of Care

The patient experience has moved from a differentiator to a determinant of financial performance. As value-based care expands, patient perception and engagement with an organization's brand and care experience directly influence trust and loyalty.



## The Rise of Value-Based Care

Healthcare leaders increasingly recognize that financial performance will be defined by models that prioritize measurable value over transactional care.



**of healthcare executives view value-based care as the future of healthcare delivery**

*Market.us Media, Value-based Care Statistics 2025*

## Growth Depends on Experience

As competition for patients intensifies, healthcare organizations are looking beyond access and clinical quality to differentiate themselves and sustain growth.



**of health system executives agree they need to improve consumer engagement, branding, and trust to attract new patients and drive growth**

*Deloitte, 2025 US Health Care Executive Outlook*

# What's At Stake

## For patients

- **Trust and loyalty erode**

Inconsistent or poorly designed environments weaken confidence in care quality, making patients less likely to return or recommend an organization.

- **Experience suffers**

Disjointed, impersonal spaces can heighten anxiety, confusion, and dissatisfaction, negatively impacting perceived outcomes and overall experience.

## For caregivers

- **Pride and engagement decline**

Environments that don't reflect organizational values or support patient-centered care can reduce staff morale and sense of purpose.

- **Care delivery is compromised**

Poorly designed spaces create friction in patient interactions, making it more difficult for caregivers to deliver empathetic, consistent experiences.

## For organizations

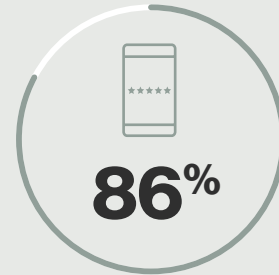
- **Growth potential weakens**

Without a differentiated, experience-driven environment, organizations struggle to attract and retain patients in an increasingly competitive market.

- **Financial performance is at risk**

Lower experience scores can directly impact reimbursement, loyalty, and long-term revenue stability under value-based care models.

### Brand & Experience Drive Patient Choice



of consumers choose healthcare based on brand reputation, rising to 90% among Gen Z and 89% among Millennials<sup>1</sup>

### Experience Shapes Caregiver Engagement



**2.3X**

Clinicians who feel their organization delivers a strong patient experience are 2.3x more likely to be engaged at work.<sup>2</sup>

### Patient Experience Directly Impacts Reimbursement

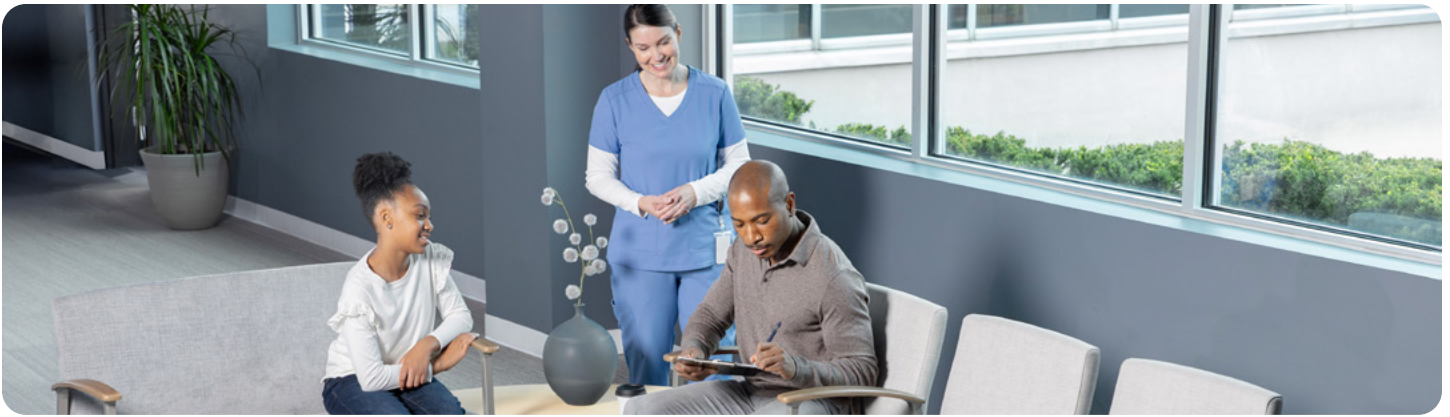


Up to 60% of reimbursement performance is driven by patient experience tied to HCAHPS—making experience improvement a top ROI investment.<sup>3</sup>

1. Press Ganey, Consumer experience in healthcare, 2025

2. Press Ganey, Healthcare Experience Insights, 2024

3. BDO USA, Unlocking the ROI of an Integrated Patient Experience, July 2020



## Design Thinking:

An organization's brand promise is experienced long before clinical care begins. Welcoming community spaces translate organizational values into physical environments, setting expectations for quality, compassion, and belonging from the first point of arrival.

### Welcoming spaces that make organizational values visible the moment patients arrive

- **Lobby and waiting areas**

Warm materials, biophilic elements, and comfortable, residential-style furnishings transform lobbies and waiting areas into welcoming environments that balance comfort, functionality, and aesthetics, signaling care and respect from the onset.

- **Community environments**

Inclusive gathering areas with intuitive layouts, clear sightlines, and thoughtful amenities such as charging access, refreshments, and family-friendly zones signal that the organization values the whole person, not just the condition being treated.



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## Design Thinking:

Patient trust is shaped in the moments where care feels most personal. Environments that prioritize comfort, privacy, and familial support help patients feel respected and valued, strengthening confidence in both the care being delivered and the organization providing it.

### Patient-centered environments designed to ensure well-being and build trust

- **Patient rooms**

When patient comfort and family presence are prioritized in space design, care environments can better support rest and recovery, strengthening the patient experience and reinforcing a brand commitment to whole-person care.

- **Treatment areas**

Supporting privacy, visual calm, and family presence preserves dignity and reduces anxiety during emotionally taxing treatments, creating patient experiences that build trust and loyalty.



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## Design Thinking:

Consistent patient experiences depend on caregiver environments that promote visibility, responsiveness, and connection, enabling teams to deliver care that reflects organizational values at every interaction.

### Caregiver environments designed for clear communication and ease of interaction

- **Decentralized nurses stations**

Open, approachable work points signal transparency and accessibility of care, reinforcing patient perceptions of safety and responsiveness.



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- **Consultation spaces**

Residential-inspired spaces create a calm, welcoming setting for sensitive conversations, supporting meaningful dialogue and enabling caregivers to deliver more consistent, empathetic interactions.



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