

2022

# Health care trends report

A study on how health care facilities are using technology to meet the demands of the changing landscape



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# Introduction

Allegion's **2022 Health Care Trends Report: A Study on How Health Care Facilities Are Using Technology to Meet the Demands of the Changing Landscape** peeled back the curtain in the health care market to understand the trends and challenges in today's facilities. When we kicked off this research, our goal was to discover what's going on within hospitals and how they have evolved over the past five years. We conducted similar research in 2016, which you will see referenced throughout this report as a comparison.

It's interesting to see the ways the industry has changed to meet demands and expectations of today's patients—and the satisfaction of staff, which we will explore later in this report. We were curious to see how the COVID-19 pandemic transformed health care, and what we found goes far beyond PPE and touchless access control. Of course, door hardware solutions that reduce the spread of the virus are increasingly popular in health care, and

chapters 1 and 2 explore this in greater detail. Yet we also found that the pandemic accelerated the adoption of new security measures aimed at protecting people and physical assets. Many strategic initiatives around door hardware and access control have been adopted already, with more being planned for the coming months.

Electronic adoption was on the rise before 2020, so this report takes a closer look at EAC trends and compares usage today to five years ago. Another way hospitals seem to have evolved in recent years is how they are accommodating patients with distinct needs. Hospitals have had to comply with the Americans with Disabilities Act (ADA) regulations for decades, but this research shows that facilities are making door hardware changes to a greater extent than in the past. Changes for behavioral health are also more common today, leading to the need for ligature resistant door hardware in patient rooms and common areas.

The following chapters highlight the key findings from our research. We hope this information helps shine a light on the health care market.

# Overview



An online survey was conducted from August through September 2021 among **100 key decision makers** in U.S. hospitals including:



**C-suite**



**Purchasing and procurement**



**Facilities and operations**



**Clinical and service lines**



**Safety and security**

The 30-minute survey was conducted “blind” so that neither Allegion nor any of its brands were identified as sponsors of the survey. To qualify for the survey, decision makers had to have worked with, purchased or recommended one or more types of door hardware, access control or both in the past 12 months.

Health systems across the U.S. participated in the survey. **Noteworthy examples of participants include:**

- + **Ascension Health**
- + **Dignity Health**
- + **HCA Healthcare**
- + **Johns Hopkins Medicine**
- + **Kaiser Permanente**
- + **Mercy Health**
- + **New York Presbyterian**
- + **Penn Medicine**
- + **St. Luke’s Health**
- + **Trinity Health**



# 2022 Trends



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# 01

## The impact of the pandemic on health care facilities

**We're well aware that the last two years have devastated the health care industry in many ways.**

This research uncovered what has been happening behind the scenes in hospitals as the pandemic profoundly altered the ways health care facilities operate. The majority (**88%**) of the health care professionals surveyed cited at least one way that the COVID-19 impacted their organization's infrastructure needs and plans. Plans and projects were paused at nearly a quarter of the organizations surveyed, **12%** had a decrease in budget or spending and **9%** had to shift priorities.

**88%**

Cited one way COVID-19 impacted infrastructure needs and plans

**12%**

Had a decrease in budget or spending

**9%**

Had to shift priorities

“ In 2020 when COVID-19 first hit, our health system was forced to put a pause on some of the infrastructure projects. We are slowly starting to resume some of these projects. ”

Facilities Director / Manager





# 01

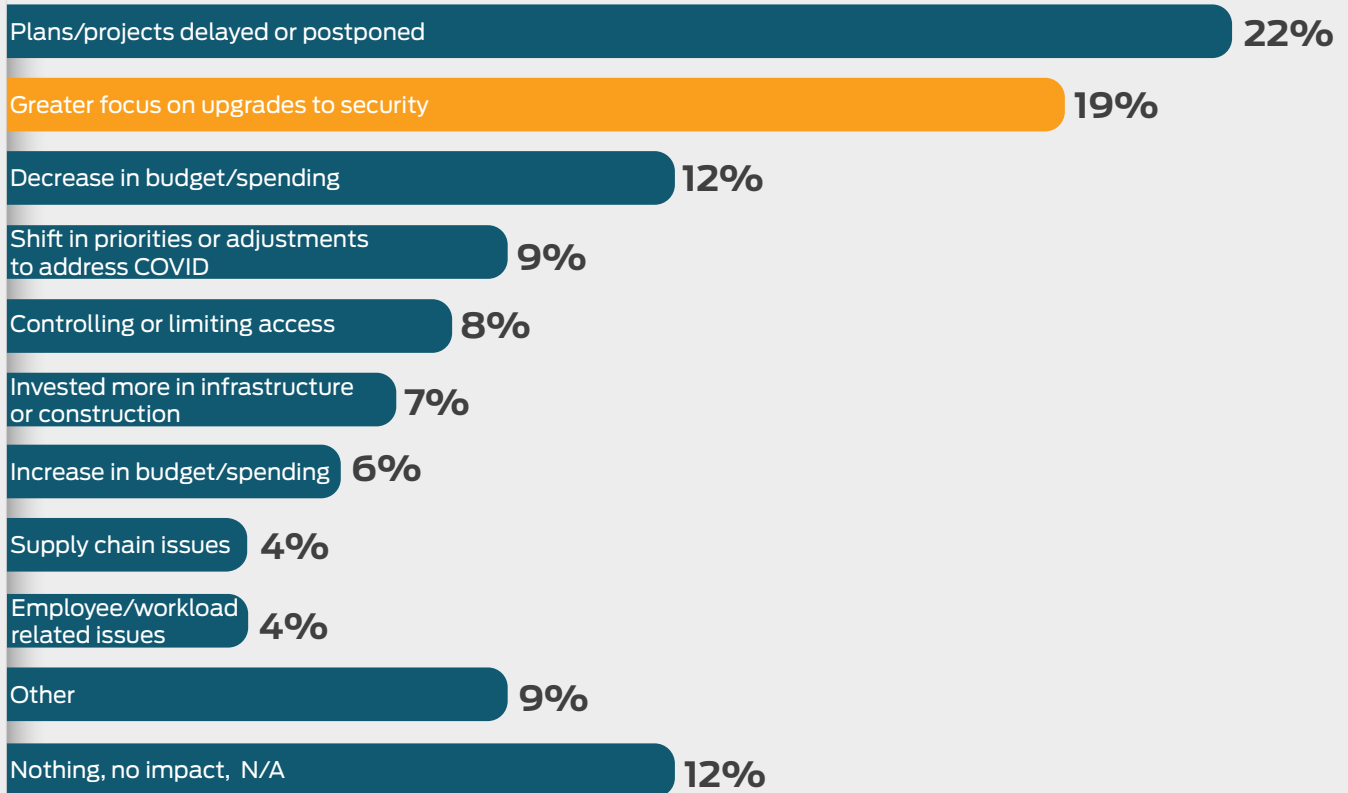
## The impact of the pandemic on health care facilities

Another notable takeaway was the impact on security.

The pandemic forced health care facilities to reevaluate the flow of people and restrict access to select areas in an attempt to limit the spread of infection while protecting people and property. **Almost three-quarters of respondents** restricted access to areas that were previously open in 2021. Extra layers of security were also added in some facilities to protect supplies and patients, with **62%** of facilities deciding to electronically control access at openings.



### Impact of COVID-19 on infrastructure needs and plans





# 01

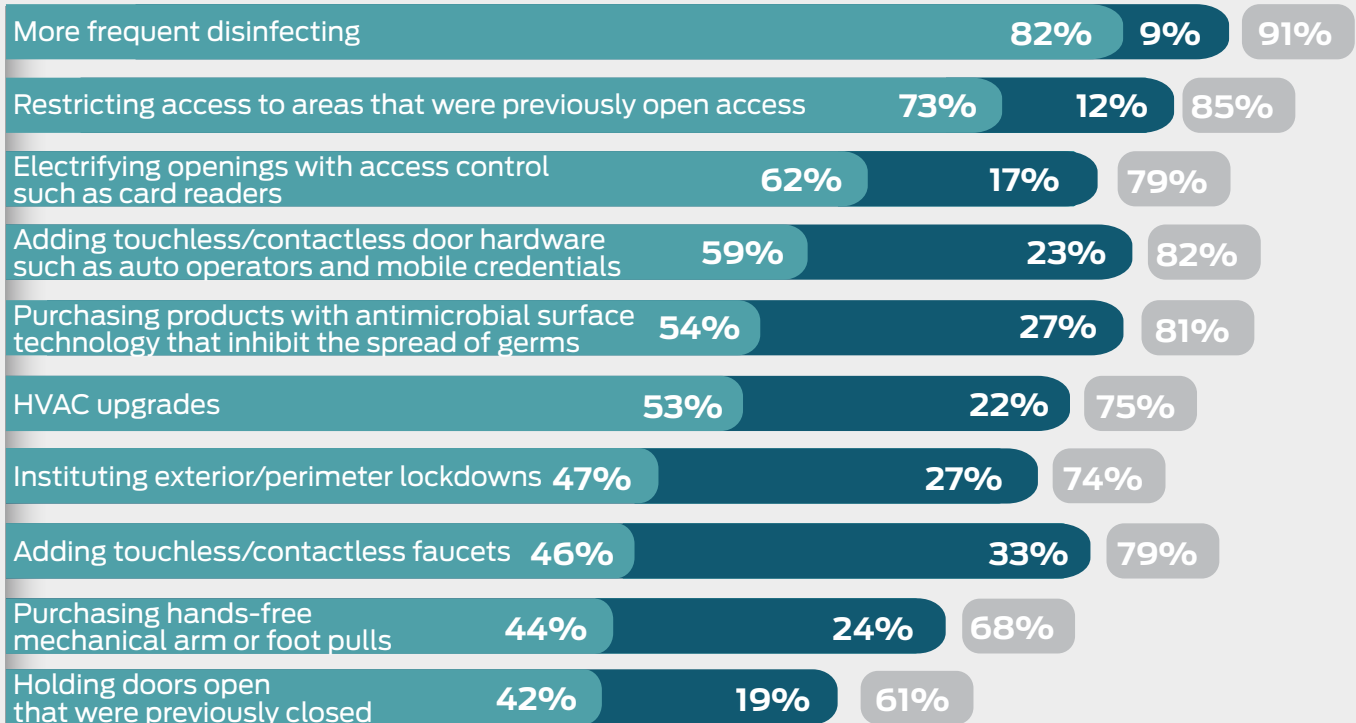
## The impact of the pandemic on health care facilities

Infection control has always been a top priority in health care facilities, but the pandemic changed the game.

More than 8 in 10 respondents increased disinfecting protocols due to the coronavirus. A majority (80%) of health care facilities altered their door hardware to help reduce the spread of the virus, including 59% adding touchless at openings and 62% electrifying openings with access control.



### Adoption of measures as a result of COVID-19



ADOPTED IN THE PAST YEAR

PLANNING TO ADOPT

TOTAL ANTICIPATED ADOPTION





# 01

## The impact of the pandemic on health care facilities

In fact, nearly **9 in 10** are using antimicrobial products in their facilities today.

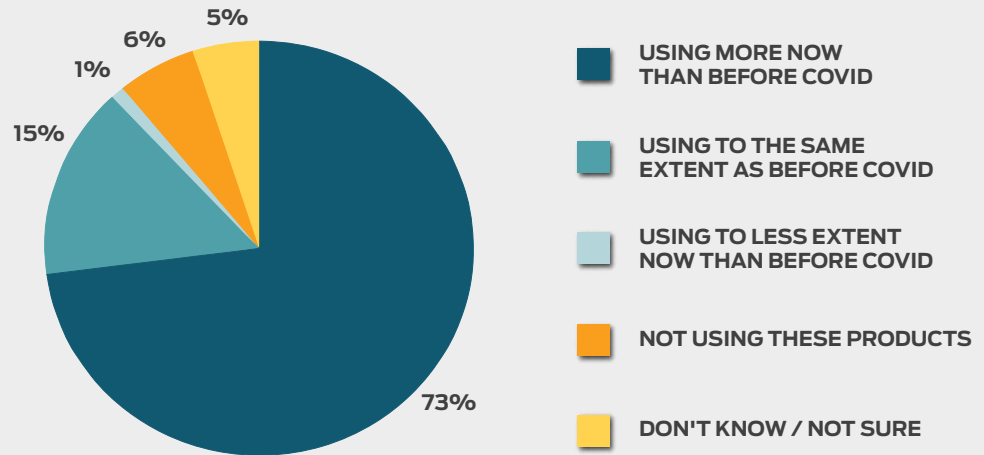
This is up from a third of facilities using these products in 2016, with **73%** stating they are using it more today than before the pandemic. Similarly, **61%** of the health care professionals surveyed said they are using hands-free or touchless access products more than before.

Clearly, there were plenty of new initiatives that were adopted in response to the pandemic, most of which didn't come for free. Unfortunately, most hospitals didn't see an increase in funding to match these expenses. Fifty-four percent (**54%**) had an increase in expenses last year, while only **40%** received more funding for facilities management and construction expenses. That said, a majority (**57%**) of those surveyed received funds or grants as part of pandemic relief activities.

# 73%

stated they are using antimicrobial more today than before the pandemic

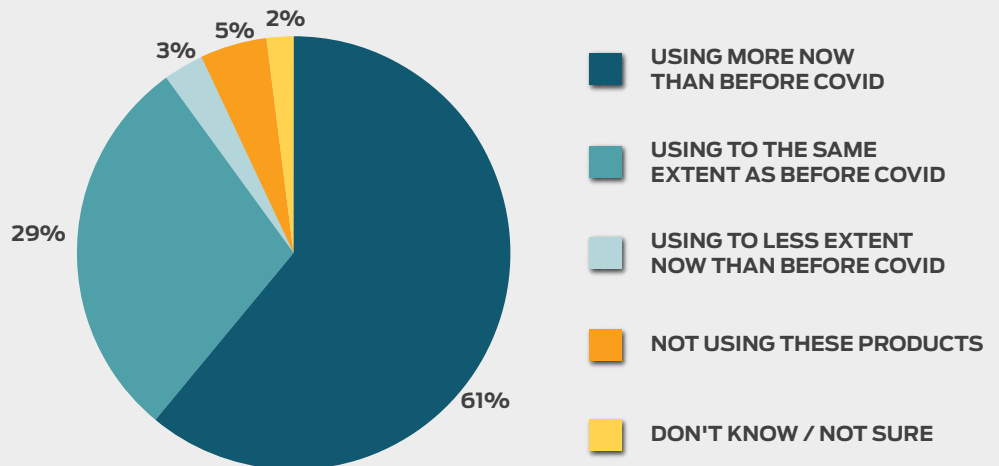
### Usage of antimicrobial solutions to reduce bacteria or spread of germs on touch surfaces



# 61%

are using hands-free or touchless access products more than before

### Usage of hands-free and touchless products



# 02

## New strategies adopted to reduce surface transmission

Infection control is far from a new challenge in health care facilities.

It's estimated that two million hospital-acquired infections lead to **90,000** deaths each year—even before the pandemic. Yet the coronavirus was an entirely new hardship for health care facilities so it's no surprise that we saw a lot of new trends in infection prevention strategies.

Read more about [touchless access control](#) and how it can help combat hospital acquired infections.

“ Stopping the spread of hospital infections became a much bigger issue since the start of the pandemic. ”

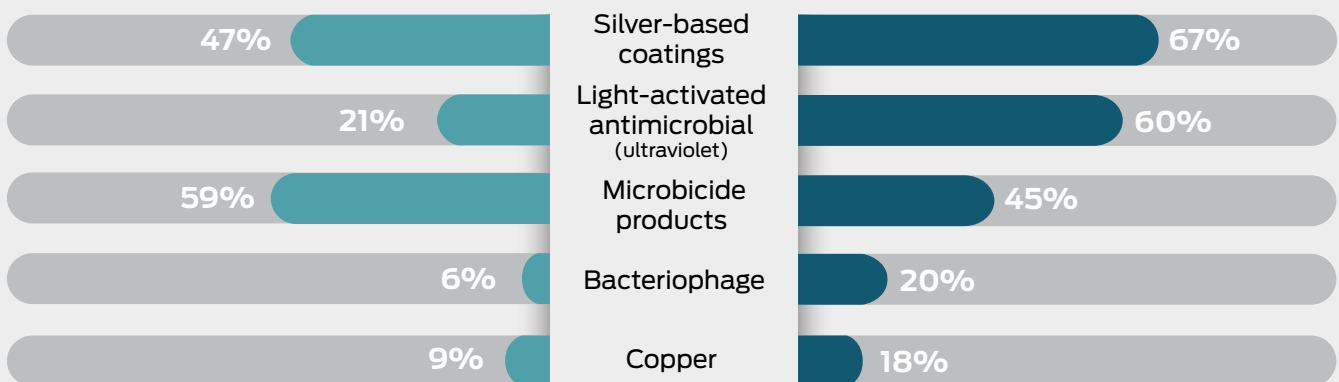
Operations Director / Manager



### Antimicrobial products being used

2016 SURVEY  
(N=34)

2021 SURVEY  
(N=89)





# 02

## New strategies adopted to reduce surface transmission

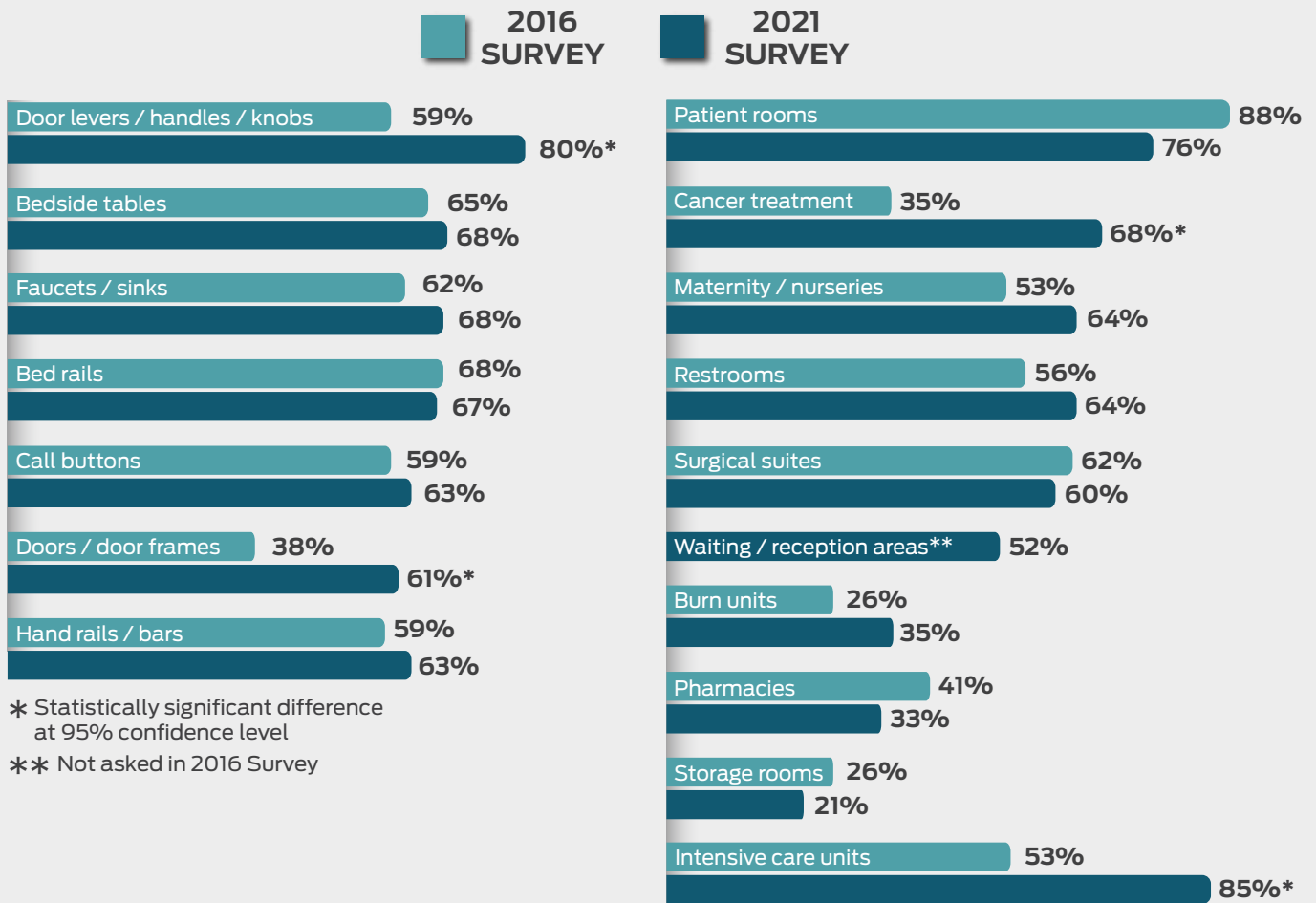
Among the popular ways to reduce the spread of germs on surfaces was the addition of antimicrobial products, which we noted earlier are being used by nearly 90% of facilities.

What's interesting is the types of products being used. The most popular product today is silver-based coatings. However, these products have not been certified to protect against viruses. While copper has shown more promising results in reducing the spread of viruses, it's being used by less than a quarter of hospitals.

Antimicrobial solutions are just one tool available for infection control. Removing the need to contact high-touch surfaces is another effective way to prevent the spread of germs and viruses. This is happening in most hospitals (93%) today throughout the building—from patient areas like individual rooms and the ICU to common spaces like restrooms and reception areas. Patient rooms and intensive care units are the most popular places where hospitals are implementing healthier door hardware

[Read more about how antimicrobial copper can slow the spread of deadly infections in hospitals.](#)

### Applications of antimicrobial products



# 03

## Trends in security, access and facility operations

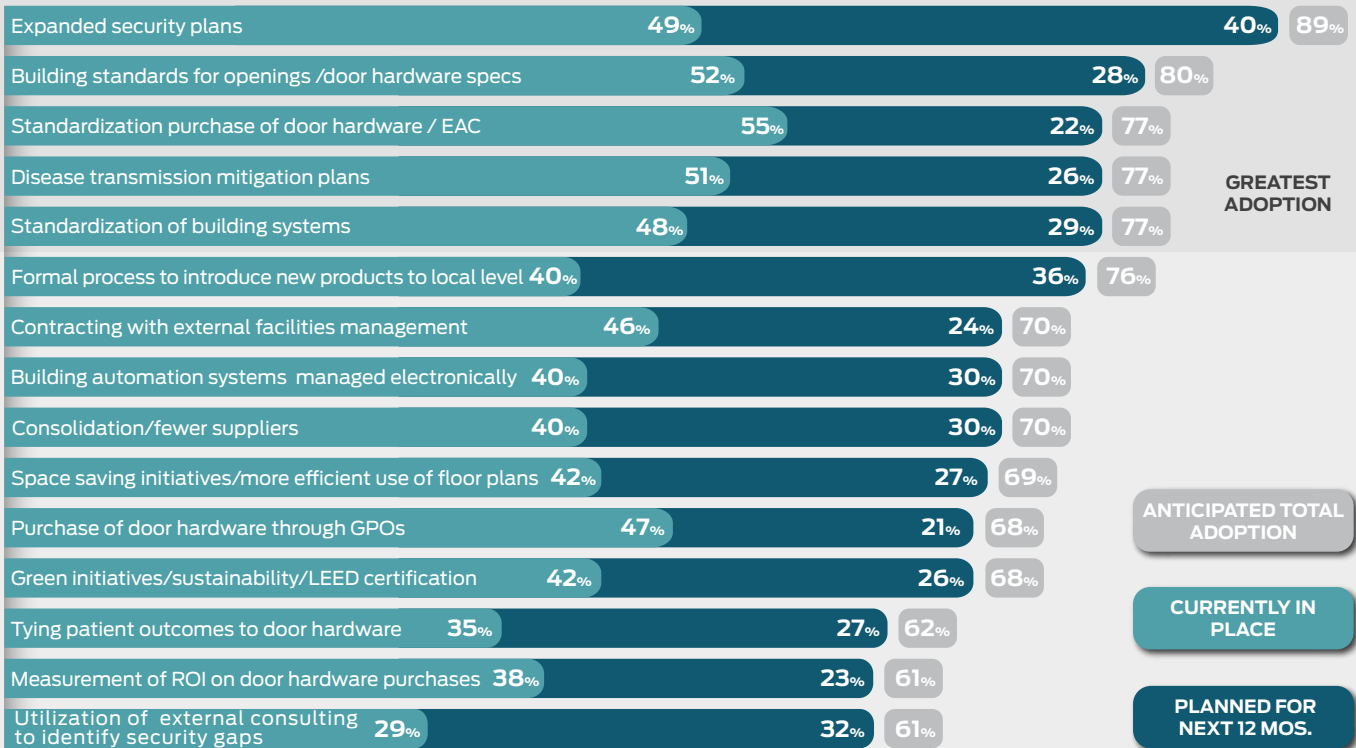
Allegion's research also looked into trends within the market, identifying strategic initiatives in place today and what's being planned for the future.

Building standards are common in most hospitals today. **More than half** of hospitals currently standardize purchasing of door hardware and access control products, which is up **13%** from five years ago. And **more than half** have standards in place for their hardware specifications.

“...with increased activity at our hospital and the charged atmosphere, security is at the forefront of our planned initiatives. COVID made physical security a larger issue for us.”  
Clinical / Service Line



### Adoption of strategic initiatives



GREATEST ADOPTION

ANTICIPATED TOTAL ADOPTION

CURRENTLY IN PLACE

PLANNED FOR NEXT 12 MOS.



# 03

## Trends in security, access and facility operations

Looking ahead, we should expect to see security-related initiatives grow in the next **12 months**. Forty percent (**40%**) plan to expand their security plans next year, including projects related to key control, credentialing and ligature resistance. Other initiatives planned for this year include:



**Formal processes to adopt new solutions and products**



**Utilization of external consulting services for door hardware and access control**

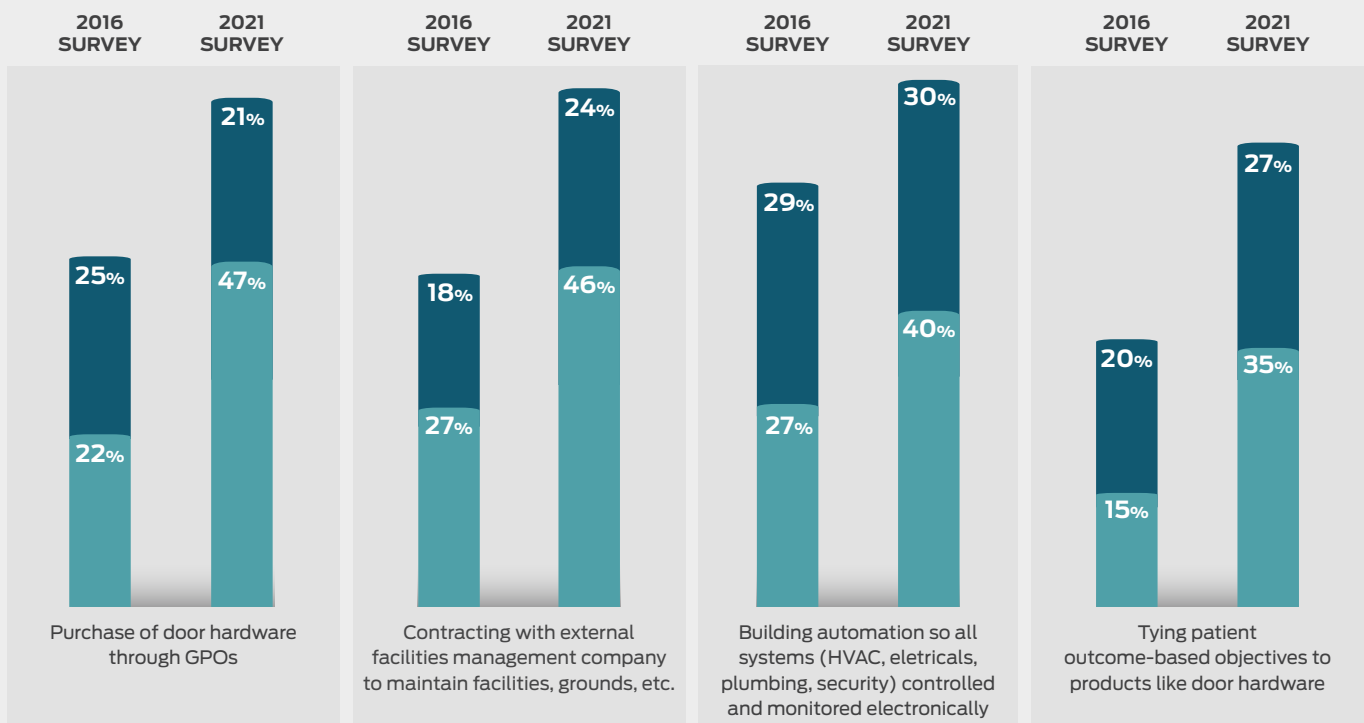


**Building automation and consolidation of suppliers**

**Adoption increased for most of the strategic initiatives inquired about in this research.**

The most significant gains in adoption during the past five years were related to the purchasing of door hardware through GPOs, contracting with external facilities management companies, building automation, and the strategic use of patient outcome-based objectives.

**Shifts in adoption of strategic initiatives over the past 5 years**



CURRENTLY IN PLACE

PLANNED FOR NEXT 12 MOS.

# 04

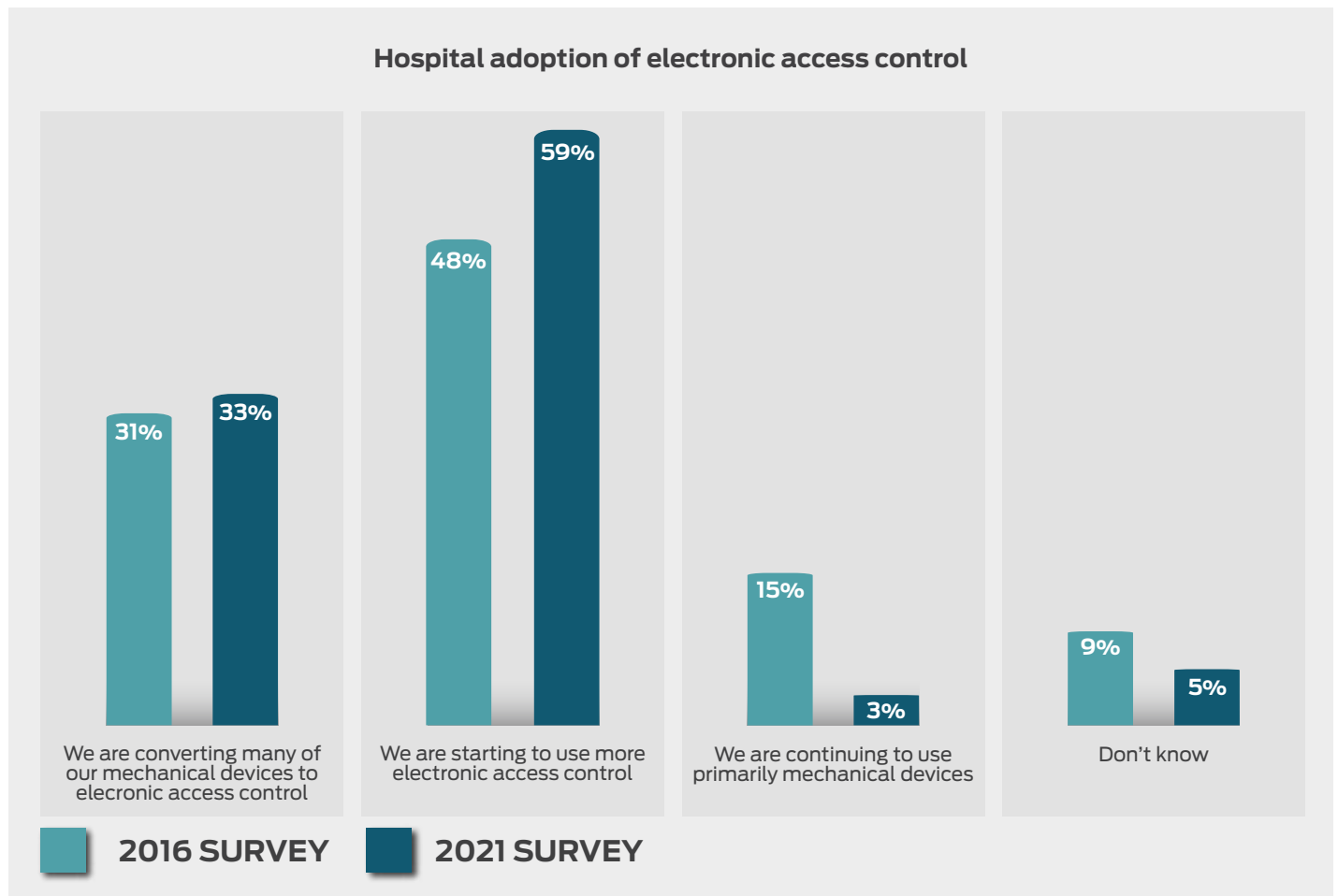
## The rise of electronics

“ We have used some of our COVID funds to increase access control to many of our outside areas. Previous to having these funds, we were limited by costs. ”

C-suite

Electronic access control adoption escalated throughout the health care market over the last five years.

This is especially true in larger facilities located in urban and suburban markets. Today, more than 90% of those surveyed are using electronic access control to some extent, which is more than 10% higher than in 2016. While 82% continue to have hardwired electronic access control products, 71% are using wireless.

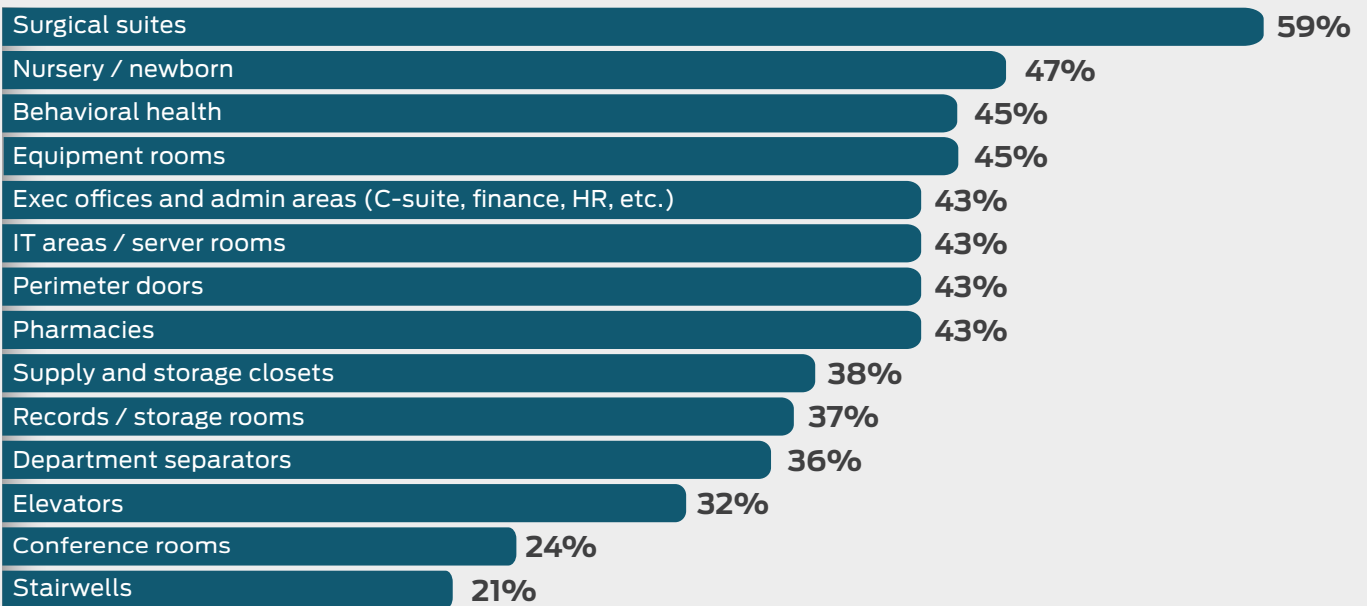




# 04 The rise of electronics

Common areas where you will see electronic door hardware include surgical suites, nurseries, behavioral health units and equipment rooms. While this is progress, health care professionals still cite cost (34%) and lack of budgets (28%) as primary barriers to widespread EAC adoption.

### Applications of EAC





# 04

## The rise of electronics



Increased budget for access control growth and upgrades has not been forthcoming in the last few years.

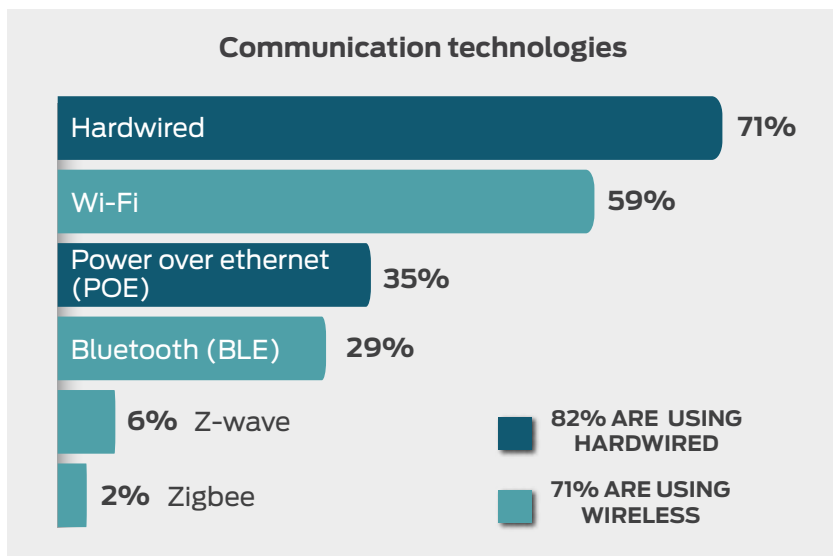
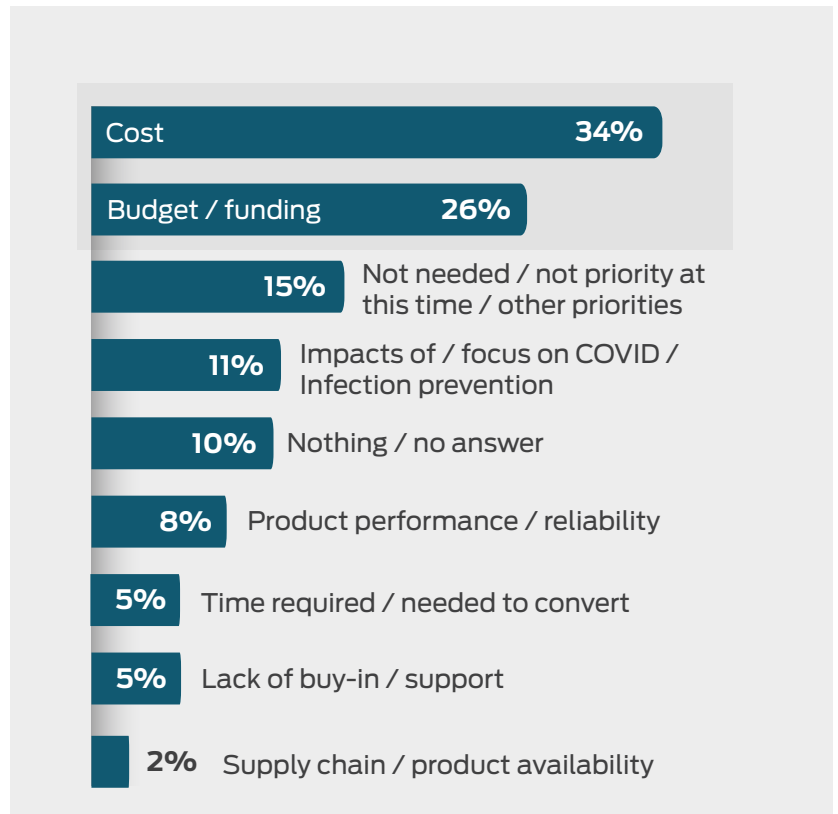
C-Suite



### Adoption could be driven by the desire for these devices to collect data for building optimization.

The research found that the hospital market is highly receptive to capturing data through their door hardware and access control. In fact, most are either currently capturing or interested in capturing data in this way. These data can be used to identify trends in building usage and positively impact operational efficiencies.

Another driving factor could be pandemic-related. These devices make contact tracing digital and easy, and electronic locks are a simple way to control access to specific wings of a hospital—a trend we noted earlier in the research.





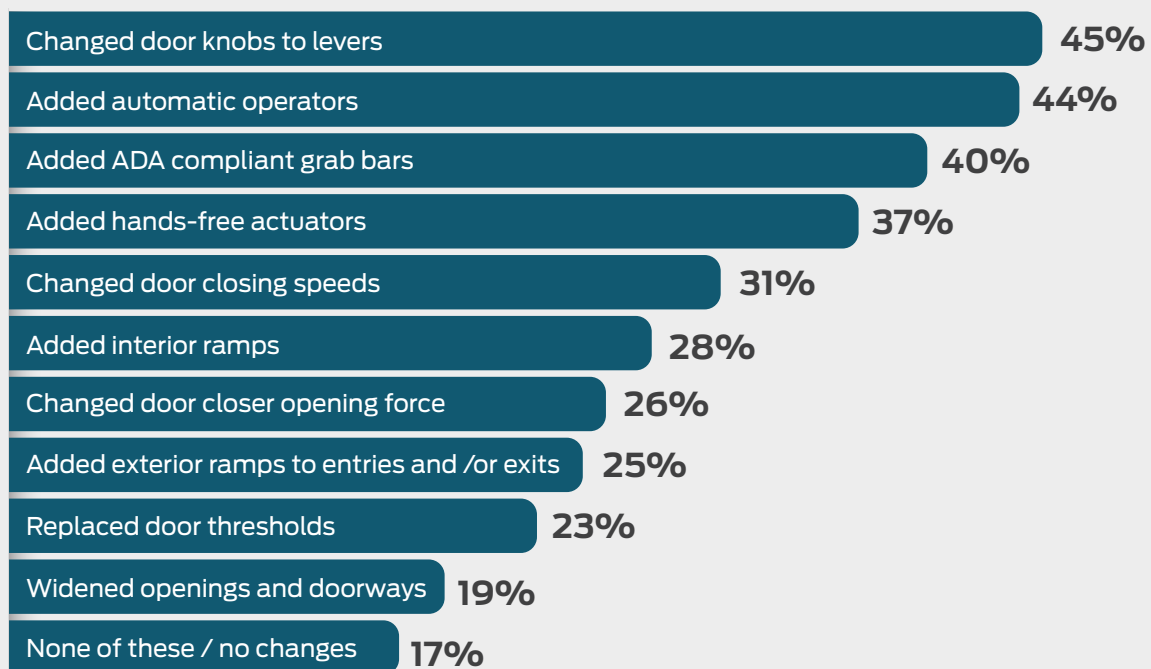
# 05

## More accommodating facilities

It appears that hospitals are making changes to their door hardware to accommodate patients of all abilities and needs. For example, last year most hospitals (**over 80%**) updated doors to meet ADA compliance with a majority citing this was to proactively manage and mitigate risks. Changing door knobs to levers (**45%**) and adding automatic door operators (**44%**) were the most common changes made in areas like patient rooms, common areas and restrooms.



Changes in past 12 months for accessibility

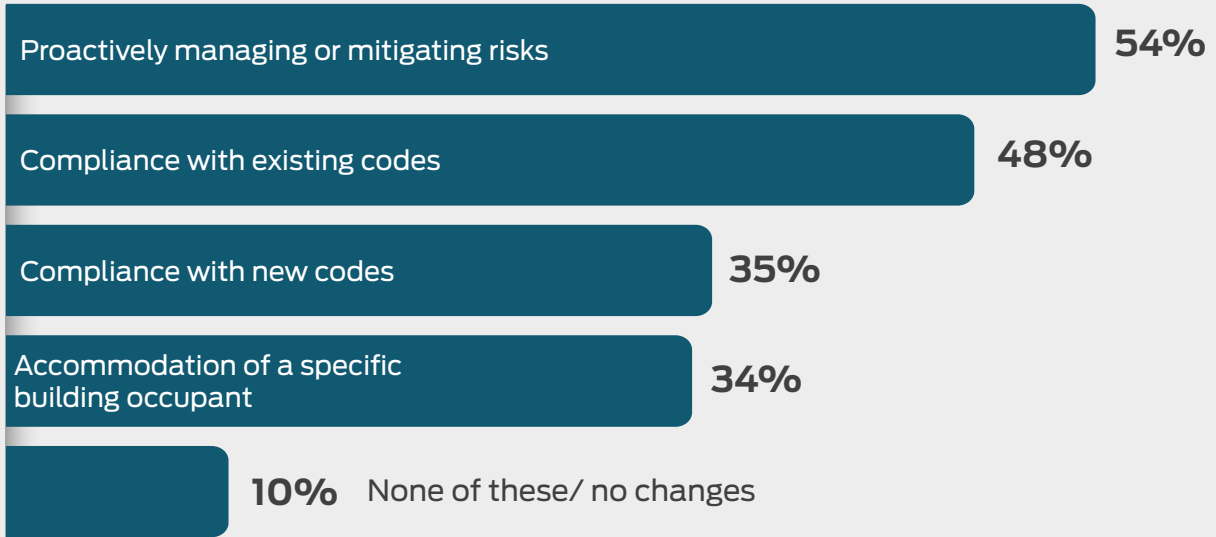




# 05

## More accommodating facilities

Primary reasons for accessibility changes

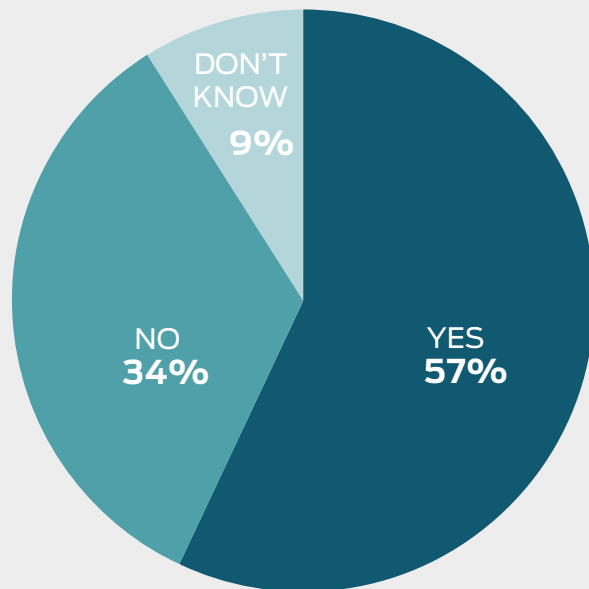


Another way health care facilities are evolving to meet the needs of today's patients is by accommodating behavioral health patients.

Many facilities (**nearly 60%**) are experiencing an increase in patients requiring rooms with ligature resistant hardware, which is specifically designed to reduce the risk of strangulation. This is a **7%** increase from five years ago and could be affected by the impact of the COVID-19 pandemic, which was cited among the drivers of the increased need for this safety hardware.

Read how [ligature resistant hardware](#) can reduce patient harm.

Increase in patients requiring rooms with ligature resistant hardware

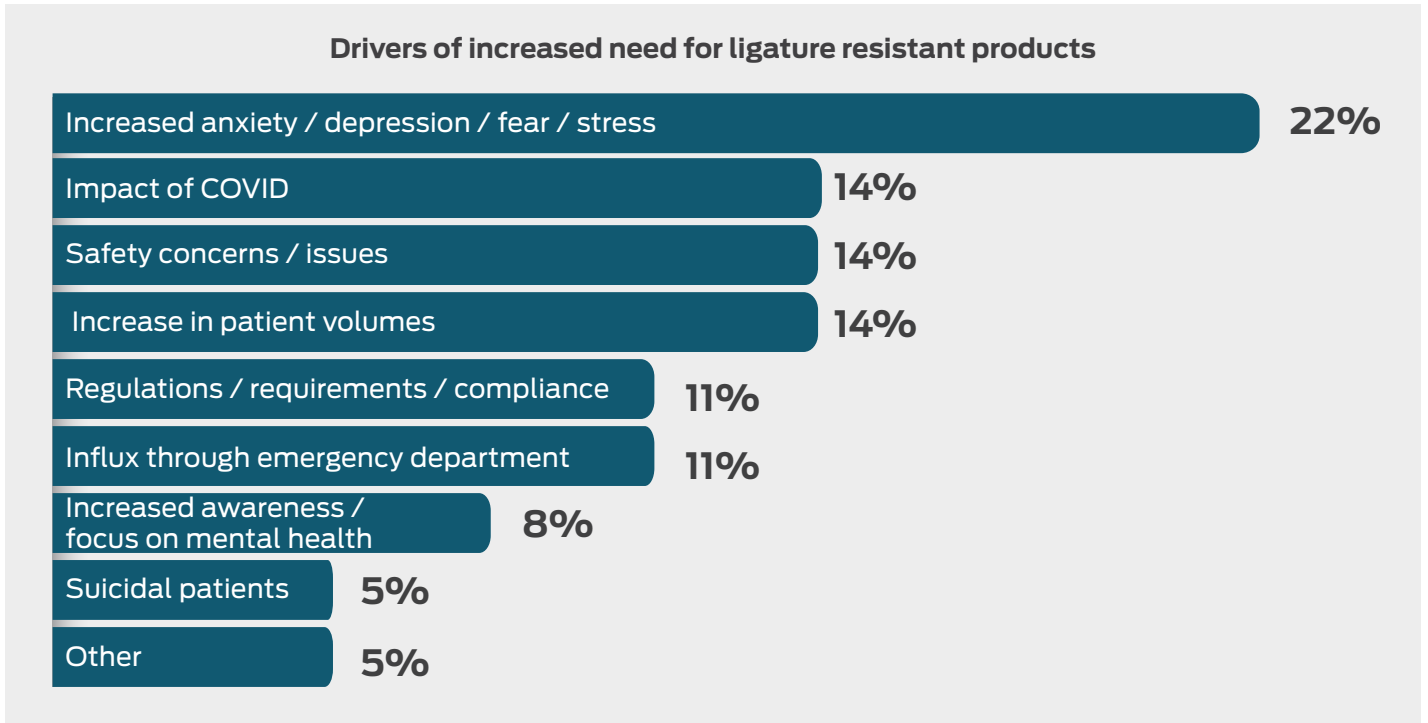




# 05

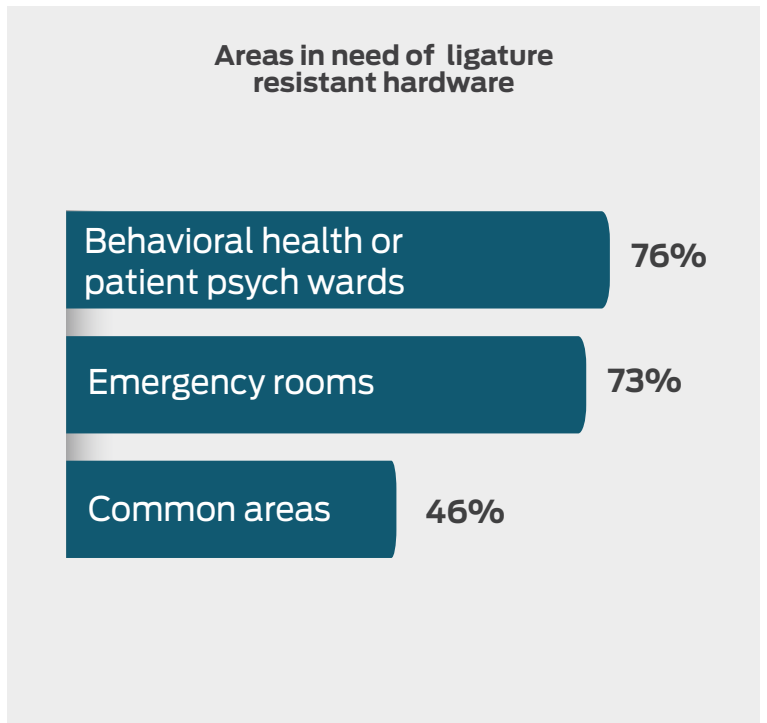
## More accommodating facilities

What’s driving the increased need for these products?



“ The pandemic is driving at least some of this increase ”  
**C-suite**

“ Bigger focus on mental health and people seeking help due to loss of wages ”  
**Service Line / Department Manager**



# 06

## The importance of staff satisfaction

Hospitals and other facilities appear to be prioritizing their staff satisfaction highly, perhaps due to the impact the COVID-19 pandemic had on this workforce.

When asked how their organization measures effectiveness of hands-free and touchless products, the top response was improvement of staff satisfaction (66%). At 60%, staff satisfaction was in the top three answers when asked a similar question about measuring the effectiveness of antimicrobials. Lastly, we found that 70% measured the effectiveness of quiet door hardware by staff satisfaction.

Hospitals are focused on keeping their staff healthy and happy. Staff satisfaction was among the top ways of measuring effectiveness for the following:



Hands-free and touchless products



Antimicrobials



Quiet door hardware



# Conclusion



The health care market has evolved significantly during the past five years, especially during the COVID-19 pandemic. New initiatives like the adoption of antimicrobials and touchless access were added to reduce the spread of viruses and bacteria, while security became even more important. **Hospitals have grown and evolved**, and hopefully have gained knowledge that will better prepare them as we move forward.

To learn more about how Allegion supports hospitals and health care facilities of all sizes, visit [us.allegion.com/healthcare](https://us.allegion.com/healthcare) or **contact a security consultant**. Our consultants are trained in the specific needs of health care and can help you assess your security needs and identify the right solutions for your facility.

**Talk with a consultant**

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# Trusted security for the health care market

Health care facilities have special challenges when creating safe and secure spaces for patients and staff. Our popular brands provide solutions that solve these challenges, such as touchless access to improve infection control in hospitals, ligature resistant door hardware to keep behavioral health patients safe and ADA-compliant products for accessible openings.

## ADSYSTEMS™

As a pioneer in the industry, AD Systems builds on our tradition of excellence by continually innovating commercial sliding doors. Check out the space-saving Examslide™ for clinics, patient rooms, medical offices and other health care applications.

## LCN®

LCN has been a pioneer in the industry since 1877, delivering door control solutions known for their meticulous engineering and quality control. In response to a growing need for touchless access, LCN introduced the simple and affordable COMPACT™ Automatic Operator.

## SCHLAGE

From durable mechanical locks to electronic access control solutions, Schlage provides protection at critical moments—when property and personal security are at stake. Schlage also has locks designed to reduce strangulation in low, medium and high-risk applications.

## VON DUPRIN®

Since inventing the first self-releasing fire exit device more than a century ago, Von Duprin continues to advance the industry through customer-centric innovation. Today's portfolio includes quiet solutions for improved patient healing environments and specialized egress solutions for senior and memory care areas.

### Consulting services

At Allegion, we strive to be your trusted advisor and help navigate the complexities of your door opening needs. Allegion's team of experts is available for consultations and facility assessments. We can offer advice on opening solutions, facility standards, code compliance, electronic access control coordination and architectural specifications.

## About Allegion

Allegion (NYSE: ALLE) is a global pioneer in seamless access, with leading brands like CISA®, Interflex®, LCN®, Schlage®, SimonsVoss® and Von Duprin®. Focusing on security around the door and adjacent areas, Allegion secures people and assets with a range of solutions for homes, businesses, schools and institutions. Allegion had \$2.7 billion in revenue in 2020, and its security products are sold around the world.

For more, visit [www.allegion.com](http://www.allegion.com)

KRYPTONITE ■ LCN ■  ■ STEELCRAFT ■ VON DUPRIN