



Questionable Practices in Healthcare Textile Services Buying

RESEARCH REPORT

TRSA[®]
REUSABLE TEXTILES & APPAREL

June 2015

Survey and Interpretation

QPs described in this report are drawn from a survey of 200 business decision-makers and 700 consumers in March 2015. National opinion research firm and consultant Fabrizio Ward gauged their sentiments toward the use of uniforms, linens and other reusable textiles in commercial settings.

Among the decision-makers in the study were buyers in the healthcare business who procure at least some of these products with a laundry service. Their replies portray typical attitudes and practices regarding the use of outsourced textile services by medical facilities.

The other respondents in the survey—consumers—indicated their preferences for garments and linen. On some matters, their responses (opining on how medical providers should handle these products) clashed with the provider norms identified in the business decision-makers' survey. This indicates potential for customer dissatisfaction with providers and conversely, their opportunity to increase patient satisfaction and improve competitive prowess by adopting the contrasting approach. Such contrasts are portrayed in this paper as QPs.

Other QPs are identified from the decision-maker research alone based on differences in healthcare buyers' preferences compared with buyers in other industries. These other types of businesses take greater advantage of uniforms and linen to create a halo effect on their organizations for relations with customers and employees that healthcare providers might enjoy as well if they modify textile product buying practices.

“Questionable” does not equate to “bad.” This paper seeks not to pass judgment on buying norms. It highlights the Fabrizio Ward research to suggest that changing them may create opportunities for business expansion or curb current or future losses.



TRSA (www.trsa.org) represents the \$16-billion U.S. textile services industry that employs 200,000+ people at 1,500+ facilities nationwide by advocating for fair regulatory and legislative policy affecting the industry and promoting the environmental benefits of reusable textiles. TRSA increases productivity, sustainability, safety and professionalism of textile services worldwide through education, certification, research, benchmarking and information-sharing. Most consumers benefit at least once per week from the cleanliness and safety of laundered, reusable linens, uniforms, towels, mats and other products provided to the service, industrial/manufacturing, hospitality, restaurant and healthcare sectors. TRSA quantifies our industry's commitment to cleanliness and sustainability through our Clean Green and Hygienically Clean Certification programs.



TRSA's Hygienically Clean Healthcare certification validates effectiveness in laundering for medical providers, ensuring their reusable textile products are free of pathogens in sufficient numbers to cause human illness. Inspections of laundries verify their use of industry best management practices in laundry structures and processes. Microbial testing of their finished laundry verifies processes and product hygiene. Practices verified include cross-contamination prevention, housekeeping, handling of soiled laundry, washing procedures (including detergent formulas, temperature, disinfectant and pH), drying, transportation and delivery.



CLEAN GREEN
TRSA Certified
Reusable Textile Industry

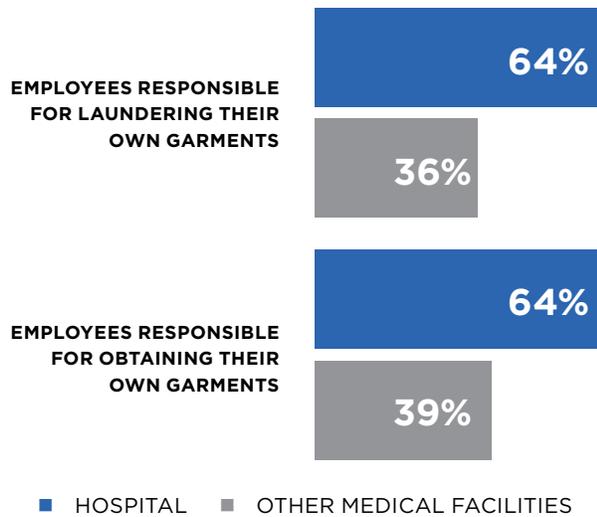
Clean Green standards comprise the only certification based on contemporary industry-wide data compiled by TRSA, which has tracked launderers' significant water and energy conservation gains over the past three decades. Certification requires documentation of individual laundry plants' such achievements and inspection of proven best management and processing practices. Clean Green is the basis for the ASTM International laundry sustainability standard, initiated by TRSA. Formerly the American Society for Testing and Materials, ASTM involved top technical experts, scientists and environmental professionals worldwide in the development and delivery of the laundry standard.

Q1

Most employees buy their own garments and take them home to clean

RESPONSIBILITY FOR PURCHASING, WASHING

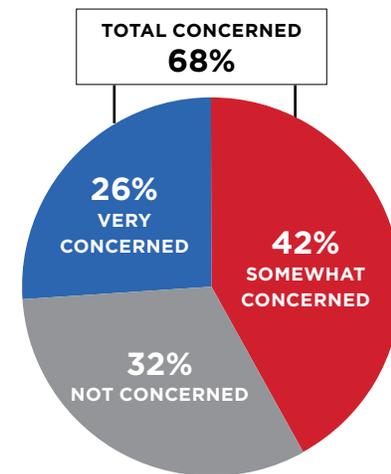
Among Healthcare Business Decision Makers that Rent Uniforms or Textiles



Even though hospitals already do business with textile services for bed linen, wiping towels and other reusable textile products, most hospitals do not include employee garments in the service agreement. Presumably hospital management believes avoiding this expense is worth sacrificing the benefit to employees of saving them these costs and the time needed to launder their work clothing. This is less of an issue for other types of medical providers, more of whom see uniform rental as a key benefit to their organizations of doing business with a textile service. It's also a core value for all types of businesses that contract with such providers. Garment rental accounts for 52% of textile services industry revenues.

CONCERN SEEING SCRUBS WORN OUTSIDE A MEDICAL FACILITY

Among Consumers



A recent *Self* magazine poll of readers found that more than three quarters of Americans flush public toilets (not urinals) with their feet. Nearly two-thirds avoid handrails on subways, buses and escalators. Almost 1 in 10 avoid shaking hands. In this age of mounting germophobia, the idea that a healthcare worker's clothing could be a launching pad for airborne pathogens seems plausible to many consumers. If employees wore rented garments and changed at work, they couldn't cause such fear.

QP2 Many employees are not trained to clean their garments properly

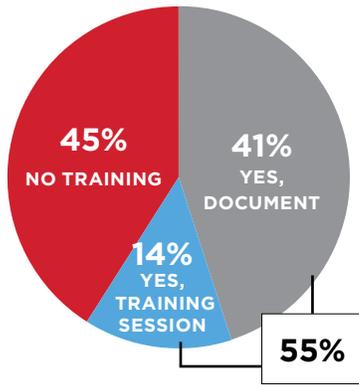
AMONG HEALTHCARE BUSINESS DECISION MAKERS THAT RENT UNIFORMS OR TEXTILES

Responsible for Washing Own Uniform

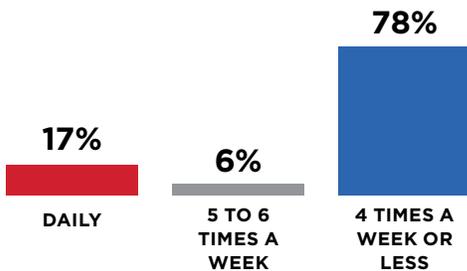


(%) EMPLOYEES RESPONSIBLE

Trained to Clean Uniform



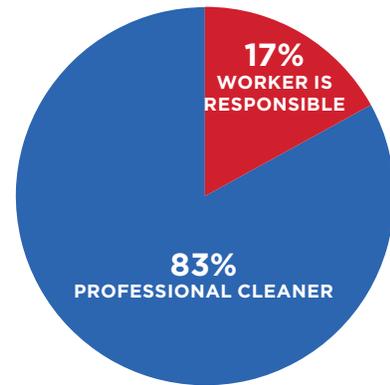
Lab Coat Cleaning Frequency



Washing healthcare uniforms the right way isn't rocket science, but it requires at least some tutelage and these clothes must be laundered frequently. Some stains are difficult to remove. An obviously soiled garment worn in a patient encounter is a high customer satisfaction risk.

CLEANER LAB COATS

Among Consumers



A better than 4-to-1 majority of customers expect lab coats to be professionally cleaned. Most aren't going to ask a doctor or any healthcare employee wearing such a coat if its cleaning is outsourced. But given public expectations for cleanliness, the relative lack of effective personal cleaning of these coats and increasing public awareness that sleeves harbor contaminants, it's best to change and clean them frequently.

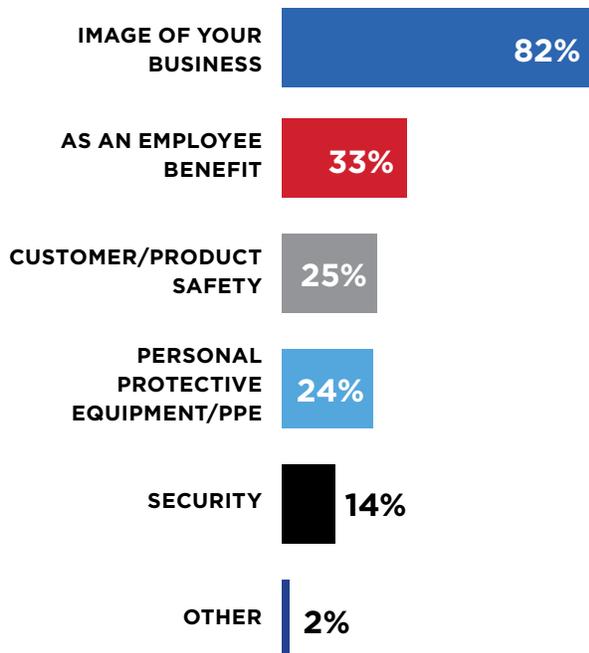
QP3

Aesthetic attractiveness is relatively insignificant in choosing garment styles

REASONS BUSINESSES WEAR UNIFORMS

Among Business Decision Makers That Rent Uniforms or Textiles

(Multiple Responses Allowed, Answers Add Up To More Than 100%)



BY INDUSTRY SEGMENT

	HEALTHCARE	HOSPITALITY	FOOD/BEV	INDUSTRIAL
UNIFORM REASONS (%)				
IMAGE	68	88	94	76
EMPLOYEE BENEFIT	22	26	33	50
CUSTOMER/PRODUCT SAFETY	34	21	14	33
PPE	54	15	10	19
SECURITY	24	15	6	14

■ 1ST ■ 2ND ■ 3RD

Better looking uniforms come at a higher price that might not be worth paying considering that healthcare environments require only functionality. Or do they? Competitive pressure suggests the need for improving every healthcare organization’s public image, to which garments contribute when buyers choose prints (as opposed to solids) and/or a wider range of fabrics and colors. Other types of businesses have embraced this philosophy. Image is more important to their business positioning and their concerns for safety and PPE aren’t as great.

QP3

continues >

QP3

**Continued...
Aesthetic attractiveness is relatively insignificant in choosing garment styles**

**RANKING OF COMMERCIAL SETTINGS:
WHERE CONSUMERS MOST PREFER
EMPLOYEES TO WEAR UNIFORMS**

Among Consumers with an Opinion:

1. Hospital
2. Delivery Service
3. Outpatient Surgery Center/Ambulatory Care
4. Fast Food
5. Casual Sit-Down Restaurant
6. Medical Offices/Lab (General practitioner, medical practice, etc.)
7. Other Healthcare (dentist, physical therapy, pharmacy, etc.)
8. Urgent Care
9. Big-Box Retail
10. Fine Dining
11. Valet or Parking Services
12. Utilities
13. Fast Casual
14. Hospitality

15. Grocery Store
16. Home Service
17. Automotive Repair or Service
18. Transportation Services
19. Smaller or Single-Store High-End Retail
20. Vehicle Sales
21. Child Care

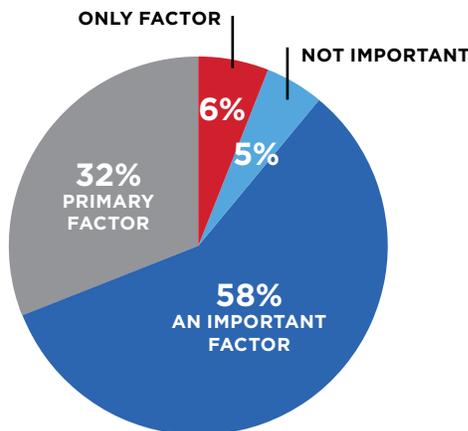
Of the 21 commercial settings in which respondents were asked to rate the importance of employees wearing uniforms, the majority of the eight viewed as most important were healthcare facilities. There's little doubt that medical providers meet this expectation. But how well is the effort enhancing competitiveness? The Fabrizio Ward research shows that every type of business, including healthcare organizations, recognizes the paramount importance of work uniforms to its image. But this sentiment is not as strong in healthcare, with more emphasis on choosing garments for safety and protection. Giving uniform aesthetics higher priority would differentiate.

QP4

Price sensitivity is a relatively heavy driver of buying decisions

**AMONG BUSINESS DECISION
MAKERS THAT RENT UNIFORMS OR
TEXTILES**

Importance of Price When Renting Textiles or Uniforms



BY INDUSTRY SEGMENT

	HEALTHCARE	HOSPITALITY	FOOD/BEV	INDUSTRIAL
PRICE IMPORTANCE (%)				
ONLY FACTOR	6	5	3	4
PRIMARY FACTOR	26	27	41	32
AN IMPORTANT FACTOR	62	61	53	56
NOT IMPORTANT	6	7	3	8

More often in healthcare than other types of businesses in the survey, getting the best price is the only factor in selecting a textile services provider. When a number of factors influence this decision, price isn't as important. But it's still very pertinent. And the minority of respondents who said price isn't important represented the smallest such dissent in all industries except food and beverage. Sensible? It suggests buyers choose low-grade, commodity products and services. But if they can get higher-grade offerings for the same price or less, it's a winning strategy.

FACTORS IN SELECTING A PROVIDER OTHER THAN PRICE

Among Business Decision Makers That Rent Uniforms Or Textiles

(Multiple Responses Allowed, Answers Add Up To More Than 100%)

PROVIDER FACTORS (%)	HEALTHCARE	HOSPITALITY	FOOD/BEV	INDUSTRIAL
CUSTOMER SERVICE	62	73	66	62
RECORD OF RELIABILITY	60	49	47	56
QUALITY CONTROL CHECKS	46	32	46	36
REPUTATION	24	22	25	24
WIDE PRODUCT OFFERINGS	28	22	20	24
FLEXIBILITY IN PROGRAMS	12	20	24	28
ACCOUNT REP 24/7	8	17	19	10
PROXIMITY TO FACILITY	14	10	15	8
ENVIRONMENT	12	17	7	10
ELECTRONIC INVOICING	10	7	8	10
YEARS IN THE BUSINESS	4	2	10	4
BUSINESS ACCREDITATIONS	6	5	2	10
INNOVATIONS	4	10	-	-

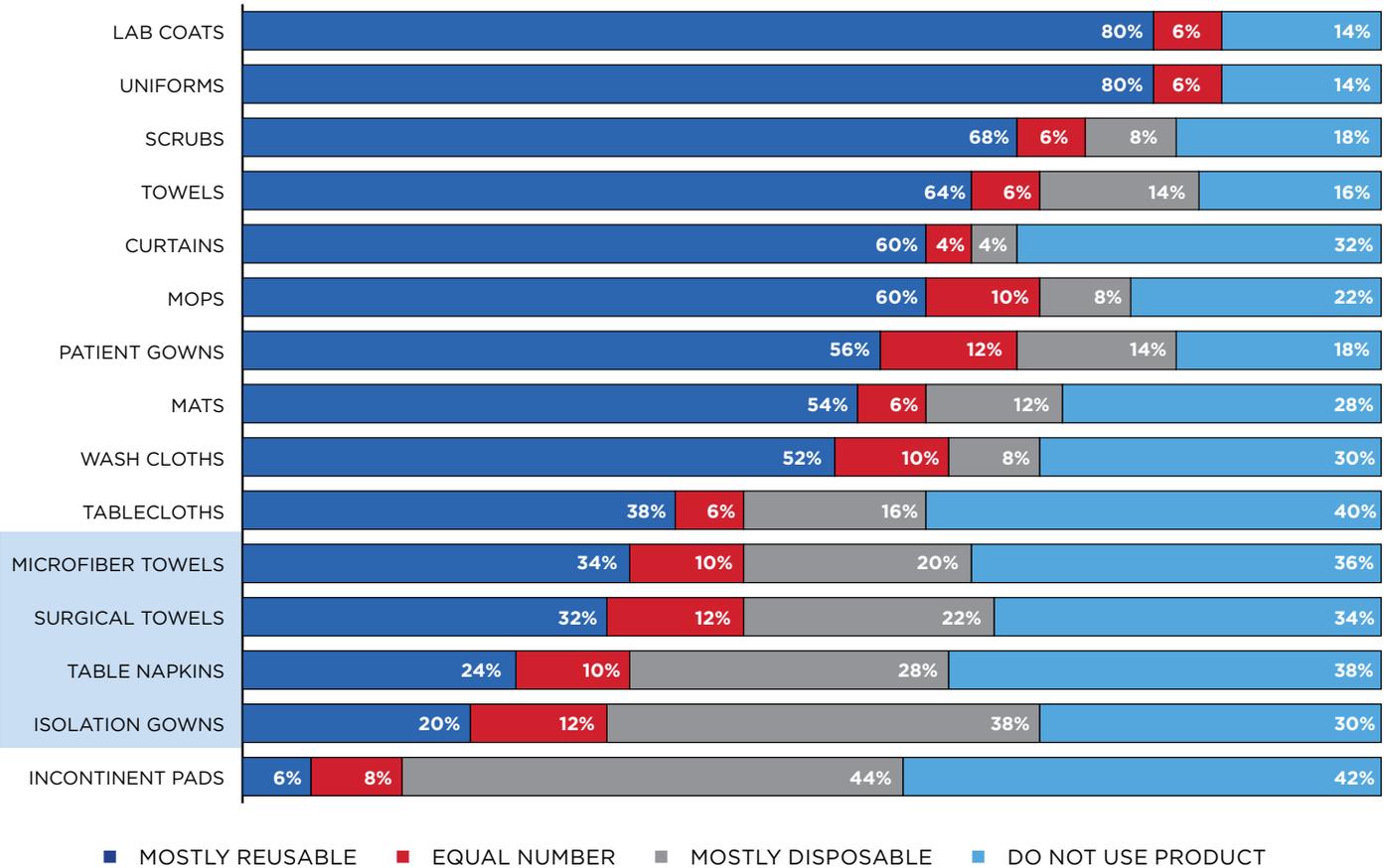
■ 1ST ■ 2ND ■ 3RD

In all industries covered in the study, when price is removed from the equation, customer service, reliability and quality controls are the three most widely considered factors to select a provider. No other factors attract the attention of 30% or more of respondents. But customer service isn't as critical in healthcare compared with most of the other sectors. The other two of the big three factors are generally more important. Perhaps it's a commodity perception: all textile services provide the same needed level of customer service. However, given the extent to which these companies attempt to differentiate through service, it seems more likely that medical providers are not recognizing these differences and taking advantage of them.

QP5

Reusable textiles are preferred to their disposable equivalents although some reusables are slower to be accepted

HEALTHCARE COMPANY PRODUCT USE & TYPE
Among Decision Makers That Rent Uniforms or Textiles

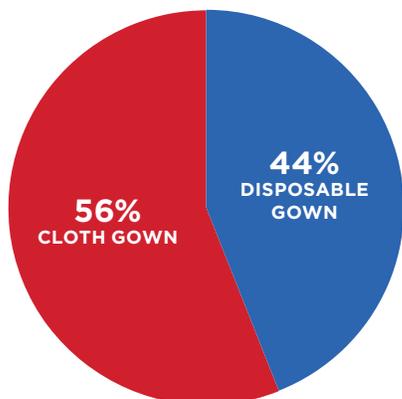


Most products typically provided by textile services have withstood the test of time. Launderable, reusable garments, linens and towels are the cost-effective and sustainable alternatives to disposables. In some cases when there’s a choice between a reusable and disposable, the latter may be viewed as more hygienic, overriding the economic and environmental benefits. In all product categories except the last five shown above, twice the number of respondents say they use mostly reusables as opposed to mostly disposables.

These five categories represent products in which reusable alternatives are relatively recent developments or disposal of a nonwoven is viewed as the more hygienic alternative. Economy- and sustainability-conscious buyers will monitor the emergence of new types of reusable equivalents and their hygienic value.

HOSPITAL GOWN PREFERENCE

Among Consumers



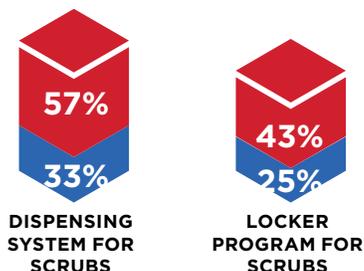
This finding is consistent with the more than 4 to 1 margin reported in the business survey of greater sentiment from hospital buyers for reusable patient gowns versus their disposable equivalent. This show of consumer support, however, is likely a reluctant acceptance of the lesser of two evils. *Kaiser Health News* recently warned of the need to “update the hated hospital gown in pursuit of patient satisfaction.” The publisher characterized such upgrades as needed for hospitals to improve patient reviews and profitability under new Medicare and Medicaid reimbursement schemes that hinge on patient satisfaction and quality of care. Addressing this with gowns is new ground for buyers focused on safety and protection in selecting garments (the norm) as opposed to their public image benefits.

QP6

Of newer offerings from laundries, hospitals gravitate toward garment inventory services while other healthcare providers favor facility services

ACCEPTANCE OF GARMENT INVENTORY SERVICES

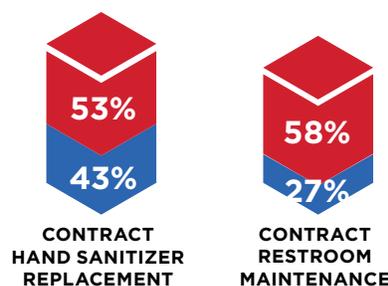
Among Healthcare Business Decision Makers that Rent Uniforms or Textiles



■ HOSPITAL ■ OTHER MEDICAL FACILITIES

ACCEPTANCE OF LAUNDRIES' ANCILLARY SERVICES

Among Healthcare Business Decision Makers that Rent Uniforms or Textiles



■ HOSPITAL ■ OTHER MEDICAL FACILITIES

Industrial laundries typically rent custom garments (embellished with names of wearers and employers on breastplate emblems attached to shirts) to businesses to provide to their workers. Employees receive their clothing when placed in their individual lockers. Such a system has been of limited utility to hospitals, as garments are often not customized in this manner. But this is changing. Perhaps more important, lockers control losses, as they communicate to workers that clothing is rationed. Uniform rental specialists have sought more hospital business and, in addition to lockers, have offered a higher-tech solution: centralized dispensing systems. These require employees to retrieve garments from a machine that serves numerous uniformed staff. Survey results indicate these systems may grow in popularity as medical facilities see the payoff in smarter inventory management.

In providing a more complete range of hygiene services laundries perform in the same vein as in delivering textile services, managing and replenishing customers' product inventory. This has long proven economically favorable to customers (less time-consuming and cash-depleting) for clean garments, linen and other reusable textiles. Today, it's becoming economically prudent for customers to pay a laundry to assign its staff to refill dispensers of air freshener and hand soap and sanitizer, as well as manage inventory of other consumables for restroom hygiene, such as paper products. Overworked smaller businesses are inclined to enter such deals; larger institutions with substantial maintenance or housekeeping operations are more likely to handle such work on their own. This survey indicates that smaller healthcare businesses have embraced such outsourcing while hospitals are slower to move ahead. As environmental services department workloads for other functions increase, these operations may turn to laundries for more help.

QP7

In multi-unit operations, many final purchase decisions on uniforms and linen are still made in patient-service locations

RENTING UNIFORMS & TEXTILES DECISION LOCATION

Among Business Decision Makers



BY INDUSTRY SEGMENT

	HEALTHCARE	HOSPITALITY	FOOD/BEV	INDUSTRIAL
LOCATION (%)				
MY LOCATION	88	83	95	92
OTHER LOCATION	12	17	5	8

With continued corporate consolidation and use of group purchasing organizations (GPOs), influences on buying decisions are less likely to emanate exclusively from personnel in the location where the purchased product or service is used. More such decisions are being made for them elsewhere. In 2014, TRSA asked readers of the Health Forum, a whitepaper website for healthcare professionals of various management titles and functions, to assess how this concept applies to textile services. We listed positions we thought were most influential (ultimate decision-maker) in choosing how laundry is processed. Roughly twice as many unit-based titles (environmental services, hospital administrator) were associated with this function as opposed to “outside” influences (GPO, hospital system). The newer Fabrizio Ward findings support this, although other economic sectors are even more decentralized in this respect.

Conclusion

As consumers are pressed more than ever to seek the best value in healthcare services, patients' satisfaction is more important to the industry. Uniforms and linens play a role in improving the quality of their experiences with medical facilities. Purchasing practices for these products therefore contribute to an organization's competitiveness in building its patient population.

Examining these practices reveals possibilities for improving or hampering performance in this respect, beyond the context of activity within a facility. Garments worn by clinical staff outside the workplace, for example, pose a public relations risk if they are identified with a facility. Those taken home for laundering create additional responsibility for workers in home laundering they may neither enjoy nor perform successfully. The alternative practice of uniform rental addresses these concerns.

Consumers expect workers to be uniformed, but organizations generally do not provide more attractive or custom garments, valuing more highly the protective aspects of clothing and low-cost options. This suggests that upscaling attire would have a noticeably positive impact on customers' perceptions of a healthcare organization.

Slow acceptance of the textile services industry's newest offerings is likely adding to hospital expenses, limiting funds that could otherwise become dedicated to improving the patient experience. This situation could be reversed by procuring reusable alternatives to disposable goods such as bed pads and towels. Similarly, labor costs may be conserved by outsourcing restroom-supply services.

Medical providers other than hospitals are also ripe for these changes. Many are already making greater use of facility services, although they are more reluctant to take advantage of garment inventory technology.

Modifying current practices is likely to involve professionals across the organization chart, such as personnel based in headquarters and field locations in multi-unit operations, GPOs and job titles in functions such as materials and facilities management, administration, infection control and more. TRSA is pleased to provide this research report to guide communication between such skilled professionals who regularly unite to improve patient care.

QP

Summary

- 1. Most employees buy their own garments and take them home to clean**
- 2. Many employees are not trained to clean their garments properly**
- 3. Aesthetic attractiveness is relatively insignificant in choosing garment styles**
- 4. Price sensitivity is a relatively heavy driver of buying decisions**
- 5. Reusable textiles are preferred to their disposable equivalents although some reusables are slower to be accepted**
- 6. Of newer offerings from laundries, hospitals gravitate toward garment inventory services while other healthcare providers favor facility services**
- 7. In multi-unit operations, many final purchase decisions on uniforms and linen are still made in patient-service locations**

USE ONLY LAUNDRY PROVEN CLEAN & GREEN

TRSA certified textile services cost-effectively launder and deliver reusable linens, gowns, scrubs, other garments, towels, floor mats and more to hospitals and medical centers allowing you to focus on patients.

To be Hygienically Clean, laundered items must be tested for microbes. To be Clean Green, laundry water and energy conservation success must be gauged.

It's the same kind of scientifically rigorous and valid performance measurement required of more and more functions in healthcare facilities. TRSA inspects and verifies these outcomes and assesses laundry management practices.

Prove your linen contributes to your efforts to conserve and control infection.
Find a Hygienically Clean and Clean Green laundry at www.trsa.org.



HYGIENICALLY CLEAN®

TRSA® Certified



CLEAN GREEN®

TRSA® Certified
Reusable Textile Industry

