

THE EVOLVING MINDSET TOWARD PUBLIC BATHROOMS IN EUROPE: A STUDY OF KEY STAKEHOLDERS

CONDUCTED BY:



| ABSTRACT

MetrixLab's primary goal for this survey is to understand the current mindset of key stakeholders (**architects, facility managers and owners/operators of restaurants**) toward drying hands in public bathrooms and how those attitudes have changed since the onset of COVID-19.

Through this research, MetrixLab aimed to:

- **Identify leading attitudes toward hand drying** since the onset of COVID-19 based on nine (9) restroom features
- **Rate the importance and likelihood of specification/purchase** of both options based on eleven (11) considerations
- Determine a **preference between hand dryers or paper towels**

| SAMPLE

In August 2022, researchers conducted this survey in Spain, Turkey and Germany. Sample respondents include architects/interior designers who spec'd a public bathroom with a hand dryer in the past year and facility managers/owners who purchased a hand dryer in the past two years.

~300 total respondents (~100 per market)

| PARAMETERS OF THE STUDY

The respondents weighed the following factors:

Nine (9) general restroom features since the onset of COVID-19

1. Increased cleaning protocols
2. Posted and updated cleaning schedules
3. Well-stocked supplies
4. Variable facility occupancy
5. Sufficient space for social distancing
6. More facilities offering paper towels
7. More facilities providing electric hand dryers
8. Touchless features
9. Smart restroom technology

Eleven (11) considerations for choosing a drying solution

1. Sanitary/hygienic
2. Cleanliness of the bathroom
3. Dry time
4. Effort to maintain
5. Noise level
6. Touchless
7. Fit with clientele
8. Enhances flow of bathroom usage
9. Cost over time
10. Fits with design of bathroom
11. Cost up front

| OVERVIEW OF THE FINDINGS

- Across all markets, stakeholders believe **hygienic implications** and **cleanliness of the bathroom** are the most important of the 11 considerations when specifying/purchasing.
 - In Turkey, **dry time** and **fit with clientele** also rise to the top.
 - In Germany, **effort to maintain** is also a strong consideration.
- Since the onset of COVID, **cleaning protocols** and **touchless features** are the biggest changes noted of the nine (9) features.
- Across all European markets, **most do not have a strong preference** for either hand drying option; **they overwhelmingly prefer to offer both**. Of note:
 - Most people are **solidly convinced of the benefits of hand dryers over paper towels**. Respondents choose electric hand dryers because they believe dryers are better aligned with public safety and hygiene goals.
 - Across all countries, **“keeps the restroom cleaner”** and **“looks good in bathrooms”** are the most significant wins for hand dryers over paper towels.

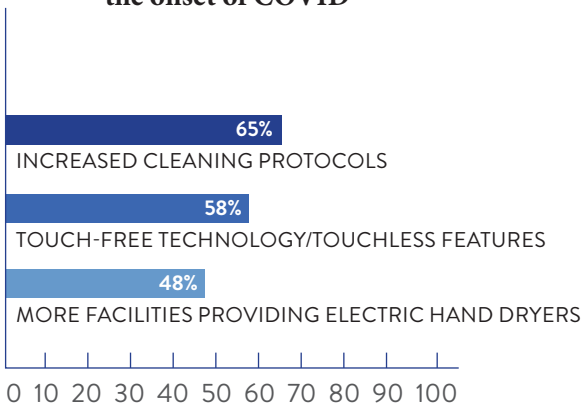
CONCLUSIONS

- The top considerations in **Germany** are **cleanliness, hygiene, dry time** and **maintenance**. 77% of stakeholders prefer to offer dryers only, both drying solutions, or have no preference. 23% prefer just paper towels.
- In **Turkey**, the top considerations to focus on are **touchless, hygiene** and **dry time**. The **fit with clientele** is also important. 92% of stakeholders prefer to offer dryers only or both drying solutions. **Only 8%** prefer just paper towels.
- In **Spain**, the top considerations to focus on are **cleanliness, hygiene, dry time** and **effort to maintain**. 91% of stakeholders prefer to offer dryers only, both drying solutions, or have no preference. **Only 9%** prefer just paper towels.

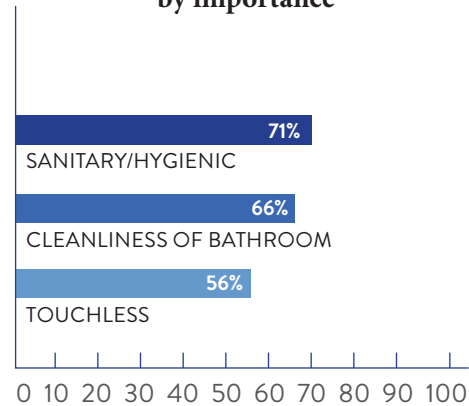
NUMBERS BREAKDOWN

Spain-Specific Results

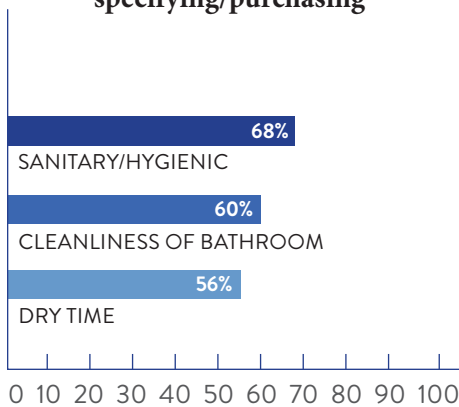
Biggest changes since the onset of COVID



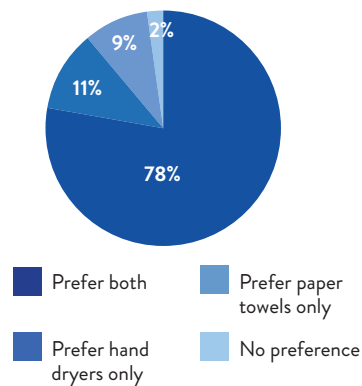
Ranking considerations by importance



Top considerations when specifying/purchasing



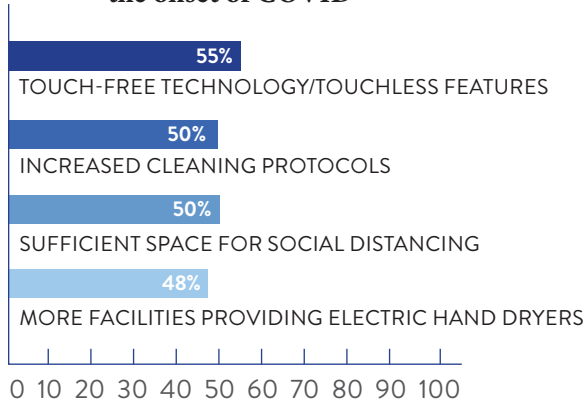
Hand dryers or paper towels



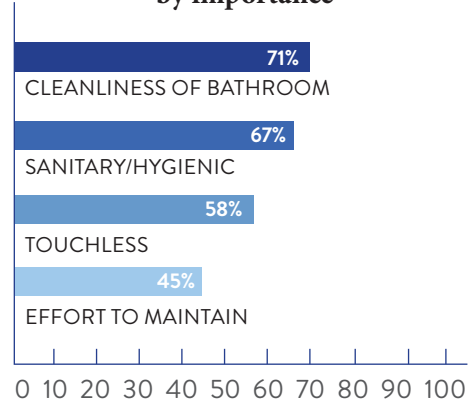
NUMBERS BREAKDOWN

Germany-Specific Results

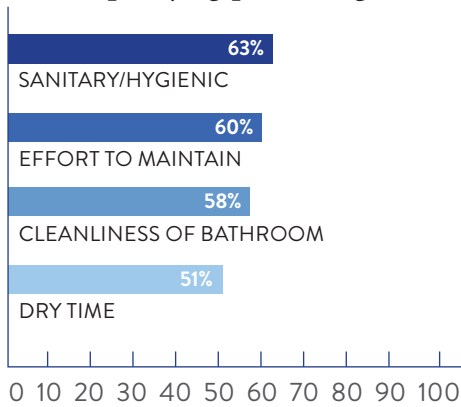
Biggest changes since the onset of COVID



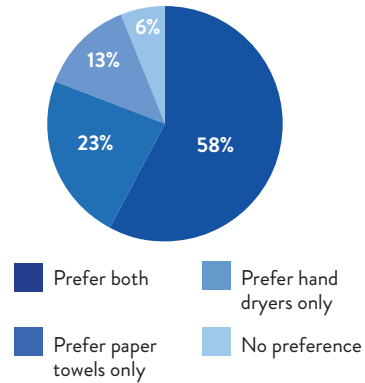
Ranking considerations by importance



Top considerations when specifying/purchasing



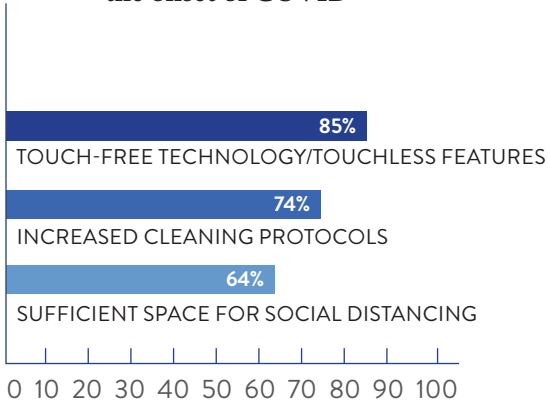
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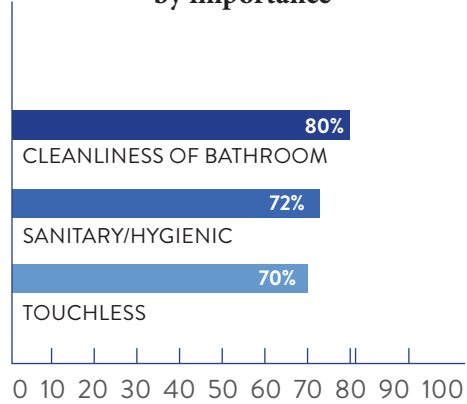
NUMBERS BREAKDOWN

Turkey-Specific Results

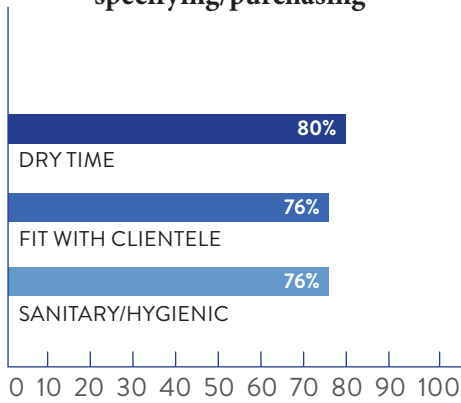
Biggest changes since the onset of COVID



Ranking considerations by importance



Top considerations when specifying/purchasing



Hand dryers or paper towels

