

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

CONDUCTED BY:



| ABSTRACT

MetrixLab's primary goal for this survey is to understand the current mindset of consumers toward drying hands in public bathrooms 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
- Uncover any recent **change in hand dryer behaviors**
- Determine a **preference between hand dryers or paper towels**
- **Rate the performance** of both options based on eight (8) drying features
- **Rate the performance** of both on key bathroom considerations

| SAMPLE

In August 2022, researchers conducted this survey in Spain, Turkey and Germany. Sample respondents were asked about a variety of restroom locations and a mix of hand hygiene options. Respondents who are parents were also asked about the efficacy of each solution regarding their children.

~1,500 total respondents (~500 per market)

| PARAMETERS OF THE STUDY

The respondents weighed the following factors:

Nine (9) restroom features since the onset of COVID

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

Eight (8) drying features:

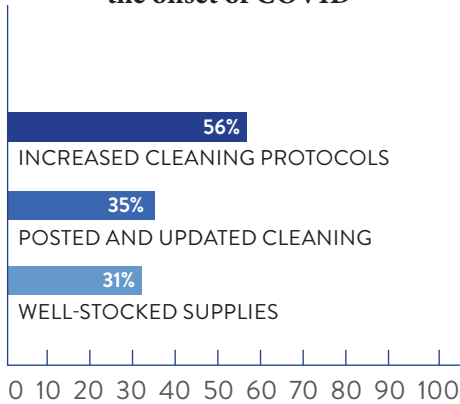
1. Fast dry time
2. Accessibility compliance
3. Heat
4. Hand sanitization
5. Water management
6. HEPA filtration
7. Air purification
8. User interface

| OVERVIEW OF THE FINDINGS

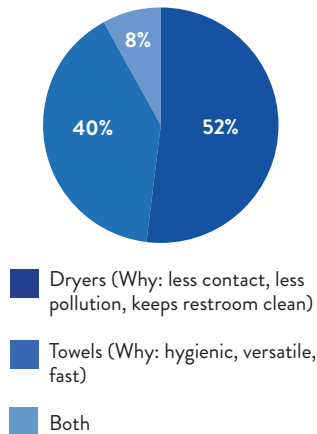
- Across all markets, consumers believe the increase in cleaning protocols is the biggest change they've seen since the onset of COVID.
- European consumers judge an establishment by the cleanliness of its restrooms—unpleasant restrooms lower perceptions of a business.
- In Turkey and Spain, consumers prefer **hand dryers over paper towels**.
- **Hand sanitization** is the top appealing feature of hand dryers in Spain and Germany **followed by HEPA filtration**.
- In Turkey, **HEPA filtration and air purification** are the most appealing features.
- **Hand sanitization** and **fast dry times** are the two biggest reasons to select hand dryers over paper towels in general.

NUMBERS BREAKDOWN - Spain-Specific Results

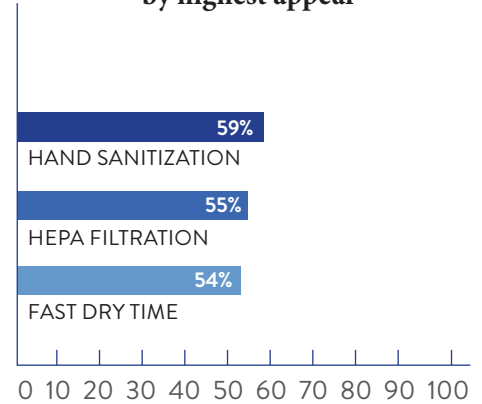
Biggest changes since the onset of COVID



Hand drying preference

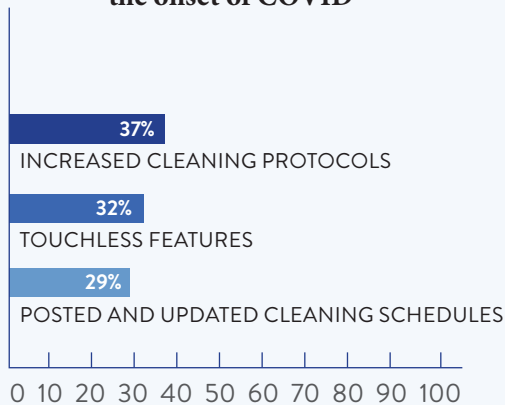


Drying features ranked by highest appeal

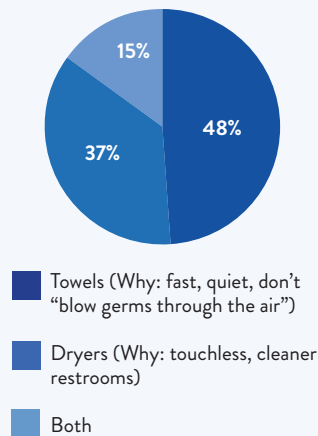


NUMBERS BREAKDOWN - Germany-Specific Results

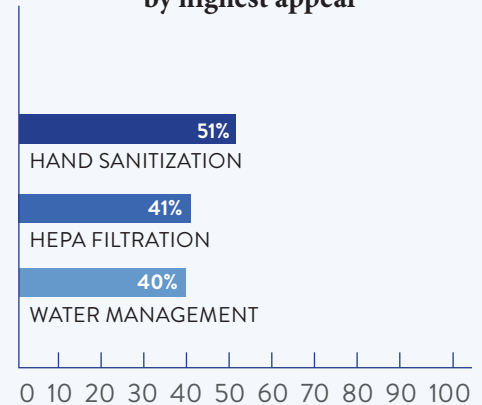
Biggest changes since the onset of COVID



Hand drying preference

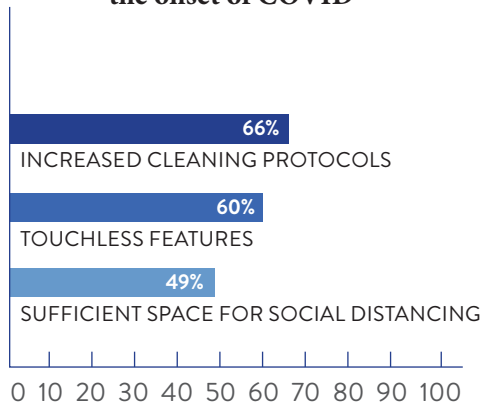


Drying features ranked by highest appeal

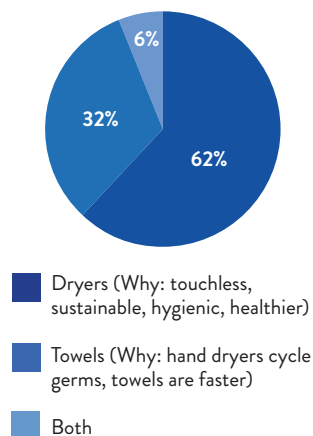


NUMBERS BREAKDOWN - Turkey-Specific Results

Biggest changes since the onset of COVID



Hand drying preference



Drying features ranked by highest appeal

