

# THE EVOLVING MINDSET TOWARD PUBLIC BATHROOMS IN THE UNITED STATES: 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 the United States. Sample respondents include architects/interior designers who spec'd a public bathroom with a hand dryer in the past year and facility managers/restaurant owners who purchased a hand dryer in the past two years.

~350 total respondents

Business Sample	
A mix of architects/commercial interior designers	N=96
Restaurant owners/operators	N=101
Commercial facility managers	N=156
Total	N=353

## | 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/hygiene of the bathroom (hygienic implications)
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 upfront

## OVERVIEW OF THE FINDINGS

- Stakeholders believe **hygienic implications** and **cleanliness of the bathroom** are the most important of the 11 considerations when specifying/purchasing.
  - Fits with design** is a top consideration for architects/interior designers.
  - Touchless** is a top consideration for facility managers/restaurant owners.
- Since COVID, **cleaning protocols** and **touchless features** are the biggest changes noted of the 9 features.
- Among all groups, “**keeps the restroom cleaner**” is the most significant win for **hand dryers (62%) over paper towels (26%)**.
- Both architects/interior designers and facility managers/restaurant owners agree that **restroom cleanliness reflects the extent to which a business values its customers and employees**.

### Top 5 changes since the onset of COVID

- Increased cleaning protocols (56%)
- Touch-free technology/touchless features (54%)**
- Sufficient space for social distancing (51%)
- Smart restroom technology (45%)
- More facilities providing hand dryers (44%)**

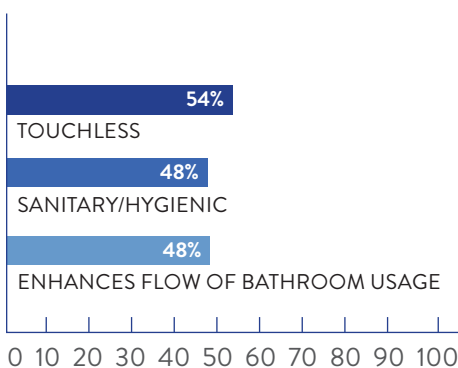
## CONCLUSIONS

- All groups** prefer to specify/provide **both electric hand dryers and paper towels** to service their customers’ needs. In general, touchless hand dryers are chosen for being more sustainable and hygienic.
- When it comes to attitudes toward hand drying, **architects and designers** are mindful not only of the **safety/hygiene features** such as **touchless options** but also **cleanliness considerations** when specifying a public restroom since the onset of COVID.
- Restaurant owners and operators** are conscious not only of **public safety** but also their **perceptions in the eyes of their customers and employees**.
- Similarly, facility managers** are most concerned with **cleanliness solutions** as well as their **reputation**.

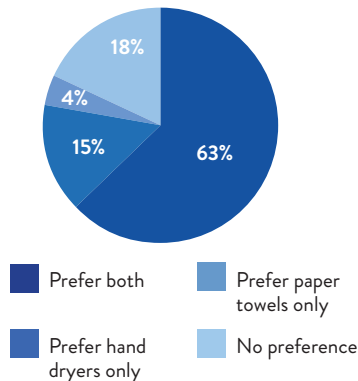
## NUMBERS BREAKDOWN

### Architect/Interior Designer Results

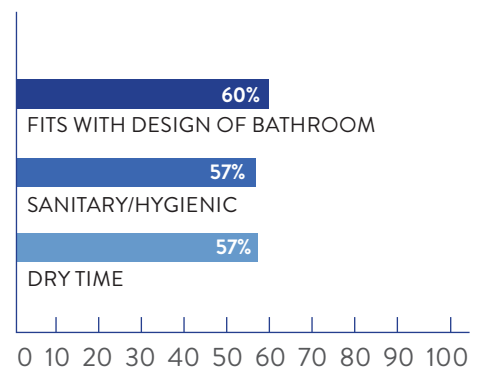
Ranking considerations by importance



Hand dryers or paper towels



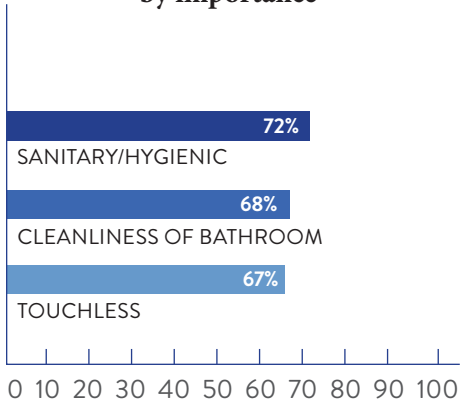
Top considerations when specifying/purchasing



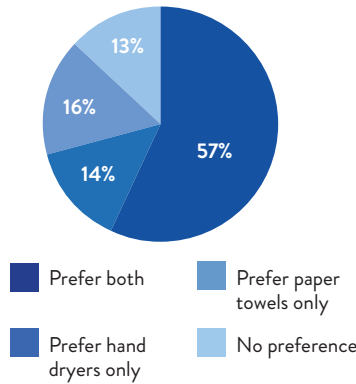
## NUMBERS BREAKDOWN

### Restaurant Owner/Operator Results

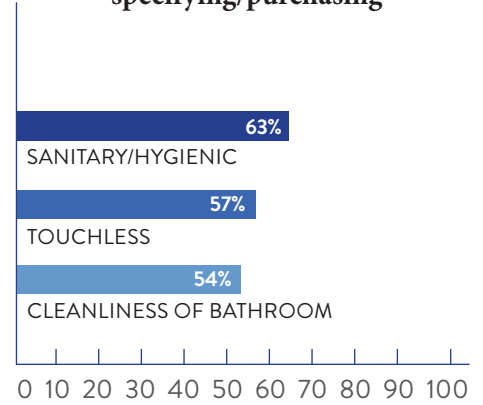
#### Ranking considerations by importance



#### Hand dryers or paper towels



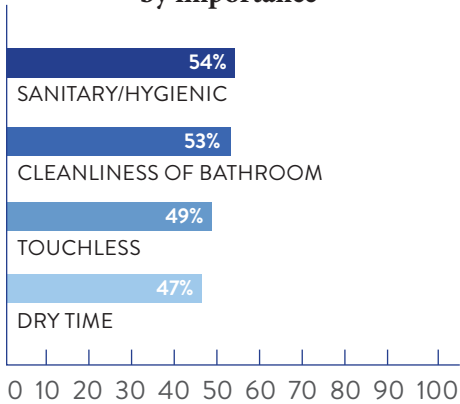
#### Top considerations when specifying/purchasing



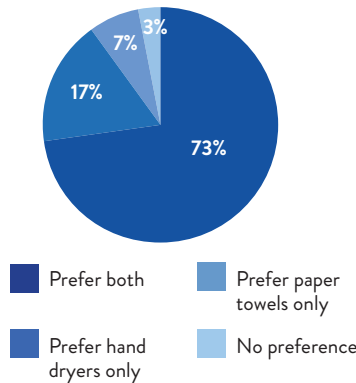
## NUMBERS BREAKDOWN

### Facility Manager Results

#### Ranking considerations by importance



#### Hand dryers or paper towels



#### Top considerations when specifying/purchasing

