

THE EVOLVING MINDSET TOWARD PUBLIC BATHROOMS IN THE UNITED STATES: 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 the United States. Sample respondents were males and females over the age of 18 who have used a public restroom in the past six months. They were asked about a variety of restroom locations and a mix of hand hygiene options.

~1,000 total respondents

| 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

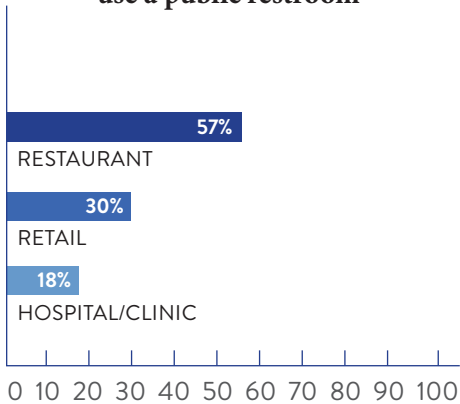
1. Fast dry time
2. Accessibility compliance
3. Heat
4. Hand sanitization
5. Water management
6. HEPA filtration
7. Air purification
8. User interface

| OVERVIEW OF THE FINDINGS

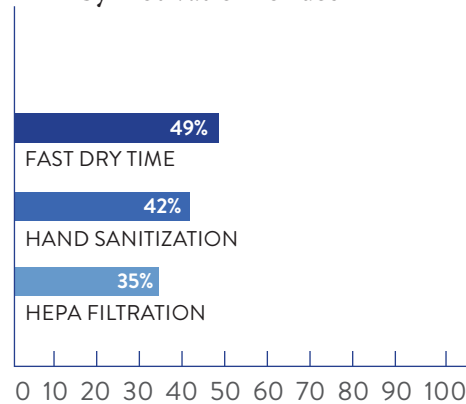
- About **3 in 4 consumers wash their hands 3–10 times a day**, and 87% use paper towels or an electric hand dryer after washing.
- Consumers judge establishments by **the cleanliness of their restrooms**, and since the onset of COVID-19, they have noticed the positive change of increased cleaning protocols, **touchless technology** and **more facilities providing hand dryers** in public restrooms.
- Most consumers believe public restrooms **should have all touchless fixtures**.
- **Larger facilities** such as stadiums/event venues, retail spaces and transportation hubs are **more likely to provide hand dryers only**.
- Consumers perceive that touchless hand dryers **keep the restroom cleaner**.
 - 20% of consumers do not have a preference between hand dryers and paper towels and are happy to use whatever is available.
- In terms of electric hand dryer features, consumers are most interested in functional elements, such as **hand sanitization, dry time** and **HEPA filtration**.
- A plurality of people prefer paper towels, but not a majority.
 - Those who prefer hand dryers say they consider them **safe and sanitary solutions that provide restroom cleanliness**.
- **“Keeps the restroom cleaner”** and **“looks good in bathrooms”** are consistently the most significant wins for hand dryers over paper towels.

NUMBERS BREAKDOWN

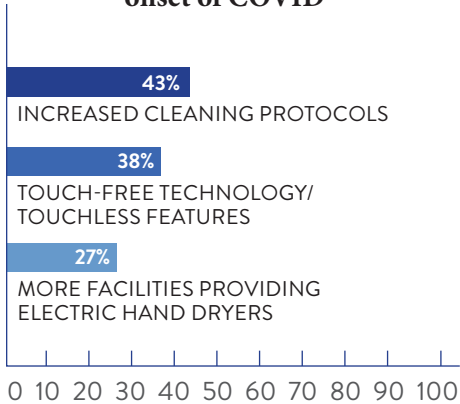
Most popular locations to use a public restroom



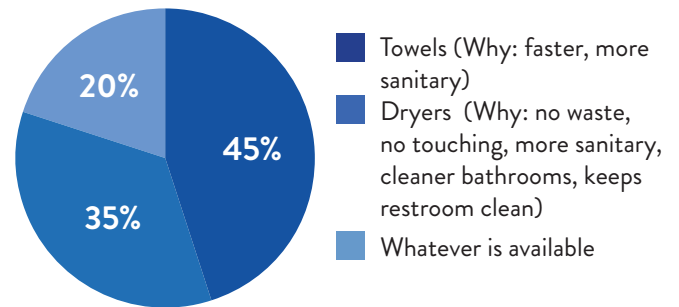
Drying features ranked by motivation for use



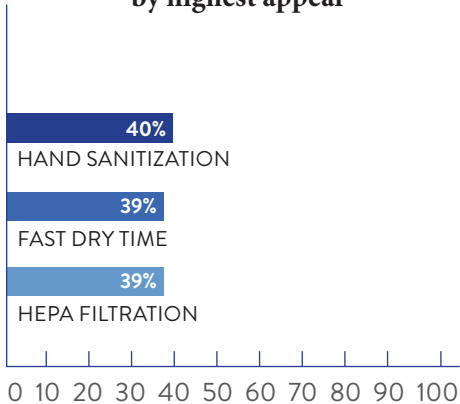
Biggest changes since the onset of COVID



Hand drying preference



Drying features ranked by highest appeal



How well do you feel each hand drying solution does on the following attributes?

Keeps the restroom cleaner
HD: 45% / PT: 14%

Dries hands fast
HD: 31% / PT: 36%

Is a safe way to dry hands
HD: 45% / PT: 37%

Helps keep people moving
HD: 25% / PT: 29%

Is a sanitary way to dry hands
HD: 42% / PT: 30%