

THE EVOLVING MINDSET TOWARD PUBLIC BATHROOMS IN EUROPE: A HAND HYGIENE STUDY STRUCTURED BY VERTICAL

CONDUCTED BY:



| ABSTRACT

MetrixLab's primary goal of 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.

Specifically, the research aimed to provide answers to these four questions:

- What are the leading attitudes toward drying hands in a public restroom?
- What are the prevailing hand drying behaviors and how they have changed since COVID-19?
- What is the preference between paper towels and hand dryers? Why?
- How do key stakeholders rate paper towels and hand dryers on key bathroom considerations? (sanitization, drying ability, convenience, etc.)

| PARAMETERS OF THE STUDY

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)

Eleven (11) considerations for choosing a drying solution:

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

| OVERVIEW OF THE FINDINGS

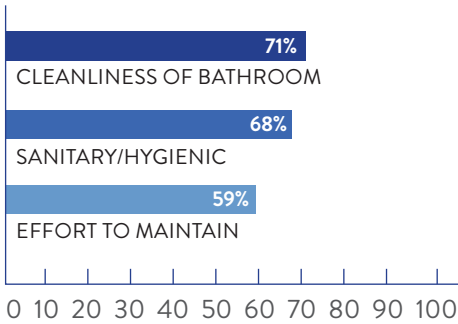
Across all countries and verticals, **sanitary/hygienic** and **cleanliness of the bathroom** were **the two most important considerations** post-COVID (which aligns with findings across these verticals in the U.S.). Additional major considerations specifically for purchasing/specifying are listed below.

- **Across all countries**, most verticals **overwhelmingly preferred** to specify/provide **both electric hand dryers and paper towels** to best serve customers' needs. **In Turkey, hand dryers (29%)** performed especially well **against paper towels (4%)** among restaurant owners.
- **All verticals said hand dryers keep restrooms cleaner** and also frequently reported that fact as a reason for purchasing/specifying.
- **Effort to maintain is a top consideration** in purchasing/specifying among facility managers and architects in Spain and **across all verticals in Germany**.
- In general, German facility managers, architects, and restaurant owners believed **hand dryers look good** and keep restrooms clean. **Hand dryers were perceived as faster** among almost all verticals in both Spain and Turkey.
- Among the **biggest changes** noted in restrooms post-COVID, **touchless features ranked notably high** across all countries. More facilities **providing electric hand dryers** was also a noted change by most verticals.

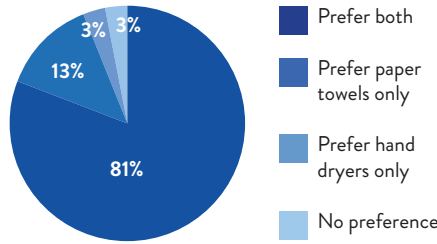
NUMBERS BREAKDOWN FOR SPAIN

ARCHITECT / INTERIOR DESIGNER RESULTS

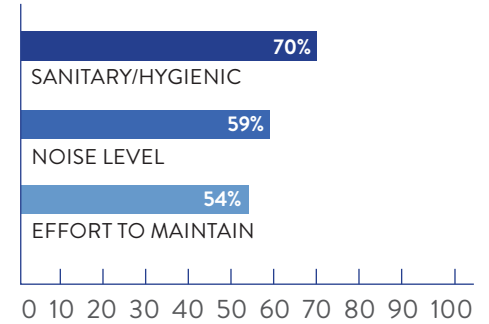
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing

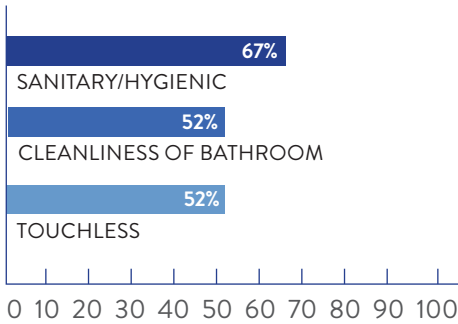


Biggest changes noted since COVID

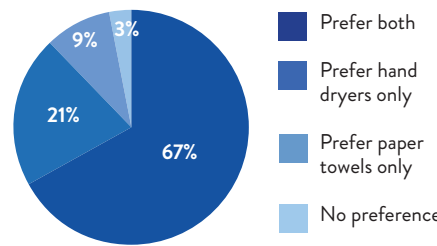
1. Increased cleaning protocols (73%)
2. Touchless features (68%)
3. More facilities providing electric hand dryers (59%)

RESTAURANT OWNER / OPERATOR RESULTS

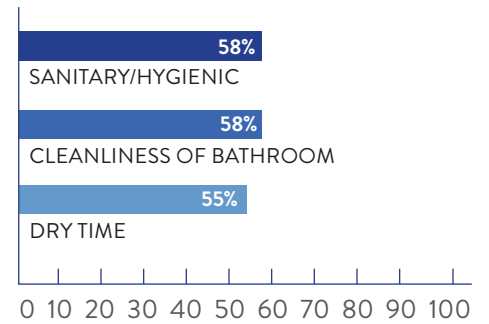
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing

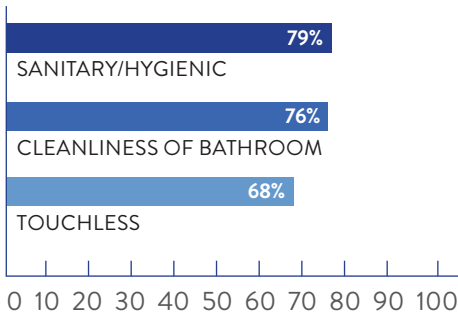


Biggest changes noted since COVID

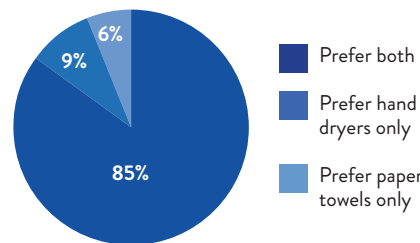
1. Increased cleaning protocols (58%)
2. Touchless features (42%)
3. Posted and updated cleaning schedules (42%)
4. More facilities providing electric hand dryers (33%)

FACILITY MANAGER RESULTS

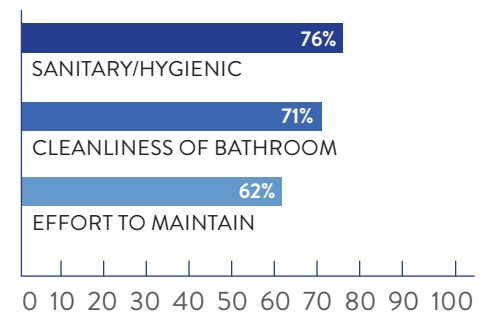
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing



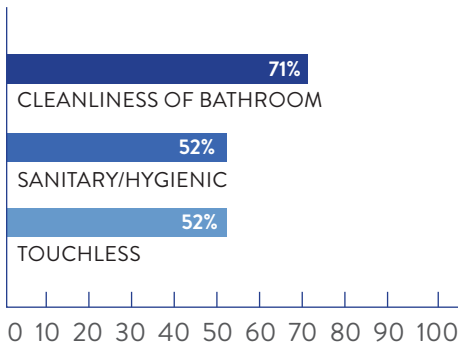
Biggest changes noted since COVID

1. Increased cleaning protocols (65%)
2. Posted and updated cleaning schedules (65%)
3. Touchless features (62%)
4. Social distancing space/protocols (56%)
5. More facilities providing electric hand dryers (50%)

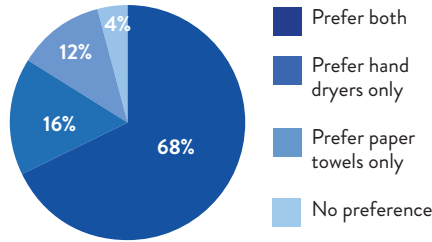
NUMBERS BREAKDOWN FOR GERMANY

ARCHITECT / INTERIOR DESIGNER RESULTS

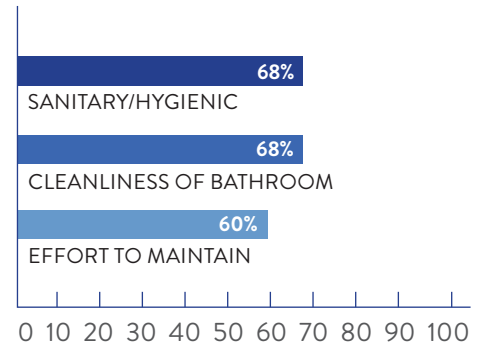
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing

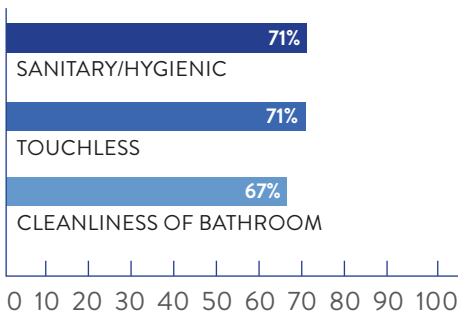


Biggest changes noted since COVID

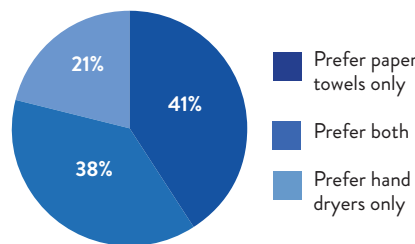
1. Social distancing space/protocols (68%)
2. Touchless features (64%)
3. Increased cleaning protocols (56%)

RESTAURANT OWNER / OPERATOR RESULTS

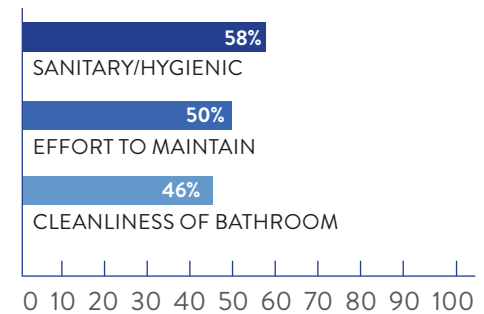
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing

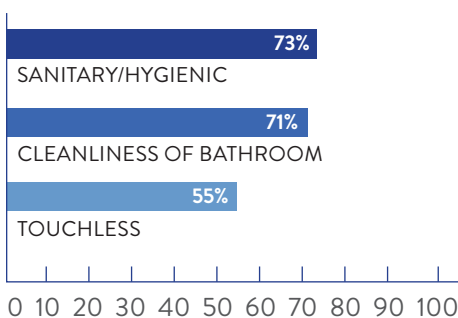


Biggest changes noted since COVID

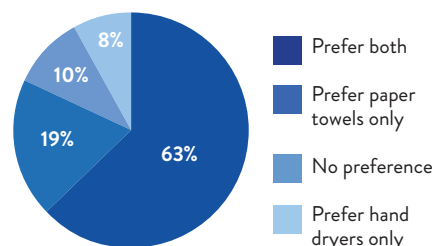
1. Touchless features (54%)
2. Increased cleaning protocols (38%)
3. Social distancing space/protocols (33%)
4. Well stocked supplies (33%)
5. Variable facility occupancy (33%)
6. More facilities providing electric hand dryers (29%)

FACILITY MANAGER RESULTS

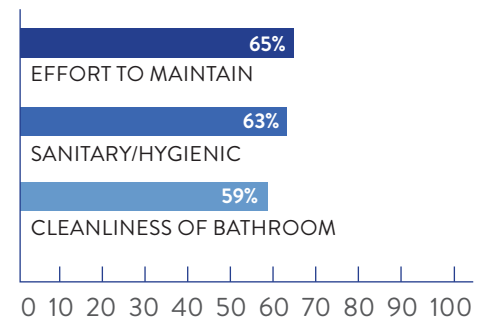
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing



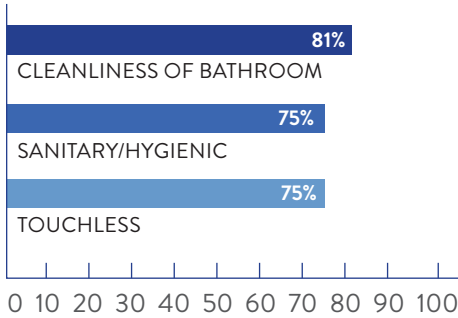
Biggest changes noted since COVID

1. Touchless features (55%)
2. Increased cleaning protocols (55%)
3. Social distancing space/protocols (51%)
4. More facilities providing electric hand dryers (47%)

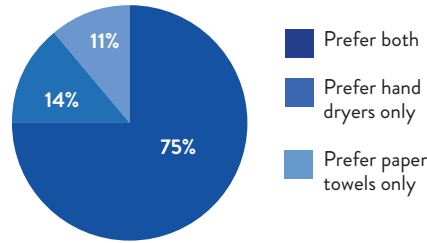
NUMBERS BREAKDOWN FOR TURKEY

ARCHITECT / INTERIOR DESIGNER RESULTS

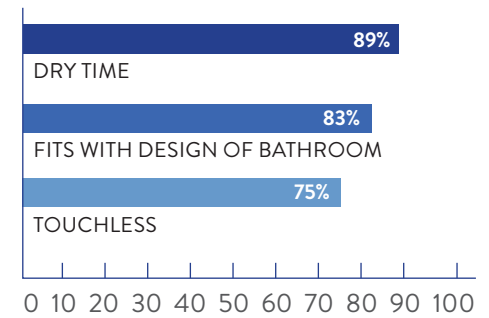
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing

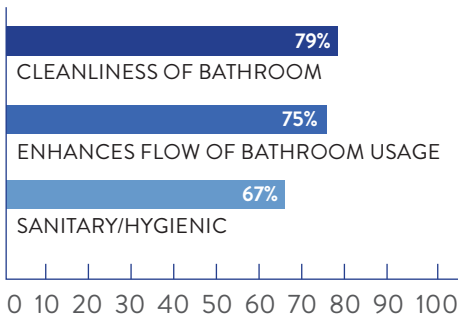


Biggest changes noted since COVID

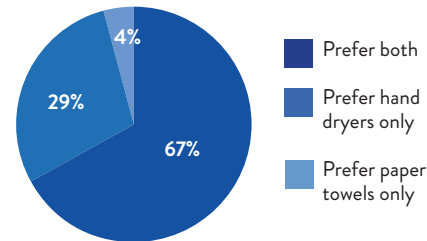
- | | | |
|---------------------------------------|--|---|
| 1. Touchless features (83%) | 3. Social distancing space/protocols (64%) | 5. More facilities providing electric hand dryers (58%) |
| 2. Increased cleaning protocols (64%) | 4. Smart restroom technology (61%) | |

RESTAURANT OWNER / OPERATOR RESULTS

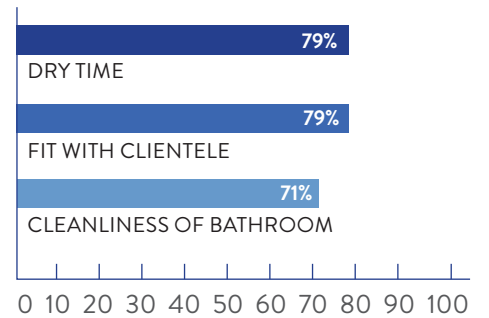
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing

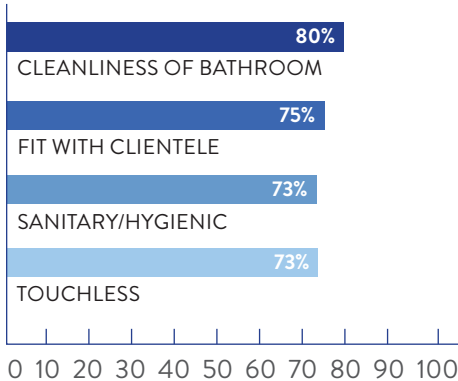


Biggest changes noted since COVID

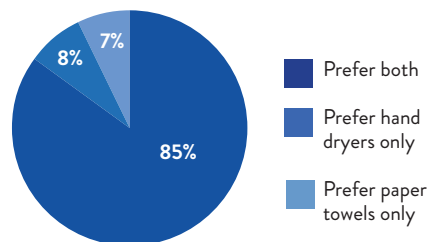
- | | | |
|---------------------------------------|--|---|
| 1. Increased cleaning protocols (75%) | 3. Social distancing space/protocols (54%) | 6. Smart restroom technology (50%) |
| 2. Touchless features (71%) | 4. Well stocked supplies (54%) | 7. More facilities providing electric hand dryers (46%) |
| | 5. Posted and updated cleaning schedules (54%) | |

FACILITY MANAGER RESULTS

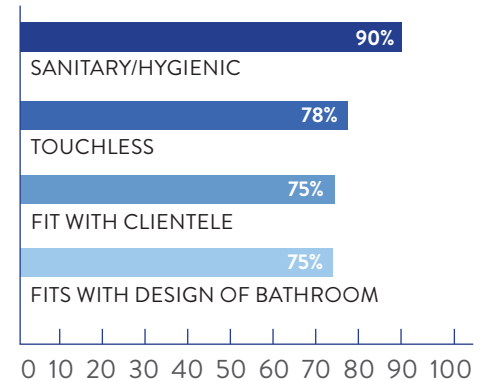
Ranking considerations by importance



Hand dryers or paper towels



Top considerations when specifying/purchasing



Biggest changes noted since COVID

- | | |
|---------------------------------------|---|
| 1. Touchless features (95%) | 3. Social distancing space/protocols (70%) |
| 2. Increased cleaning protocols (83%) | 4. Smart restroom technology (70%) |
| | 5. More facilities providing electric hand dryers (63%) |