

Great expectations

Are women's washroom needs being met?

Initial



A study of hygiene habits

Research from Initial, global leader in hygiene solutions, suggests women do not feel their needs are being met by public washrooms. Half of women surveyed (51%) were found to avoid using public washrooms as much as possible.

This spotlight report brings together insights based on two consumer research studies undertaken by Initial; considering both women as a whole and women with the highest disposable income (top 10%) of those surveyed.

Nancy Puccinelli, one of the world's leading experts in consumer behaviour, provides her expertise to discuss the psychology behind the behaviour of women. Expert in marketing to women, Marti Barletta, contributes her insight on how to effectively influence and improve a woman's brand perception.

The report goes on to help businesses to understand what women are looking for in public washrooms, and how to cater to these needs.

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The business impact of poor impressions

When women are asked what deters them from using a public washroom, it is apparent that the level of cleanliness and how well-equipped a washroom is both play an important role. These factors shape customer satisfaction and directly influence a female clientele's impressions and experiences. 51% of women cite an unacceptably dirty facility as the key reason for avoidance, followed by 41% who are put off by an overwhelmingly bad smell and 35% who turn and walk away at the sight of no toilet paper, soap or paper towels.

This is particularly prevalent when it comes to businesses that offer food and drink such as restaurants, pubs, bars and cafés. Nearly all women (96%) agree that hygienic washrooms have an impact on the image of the

establishment. 92% of women say they feel clean, well-equipped washrooms give them confidence in the quality of the food and drinks served.

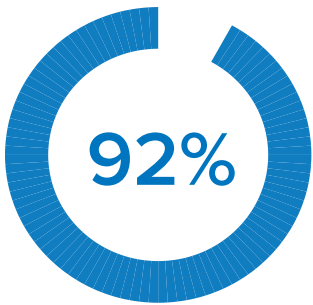
It is therefore possible that dirty or poorly equipped washrooms give the impression that the business lacks care. Women may also feel that an unclean washroom suggests an unclean kitchen.

Consumer behaviour expert Nancy Puccinelli says, "Women are more sensitive than men to negative cues. They tend to be more risk averse and may be especially sensitive and concerned by contamination as they are more likely to notice something that is out of place. Women, are more likely to notice a pool of urine on the toilet seat or washroom floor. That

signal – indicating a lack of cleanliness – will have a stronger effect on a woman than a man.

"Women's expectations in a restaurant setting might be particularly high relative to their male counterparts. They are more likely to leave establishments with unclean washrooms and avoid them in future as the risk to personal hygiene might be too great."

The importance of a washroom experience to the overall impression of that business should not be underestimated. There is a genuine risk that businesses who do not meet women's needs in the washroom risk an immediate, and perhaps indefinite, loss in female custom.



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What can we learn from women with a high disposable income?

75%
of women will leave
an establishment due
to poor hygiene.

When we look at women with a high disposable income, the business impact of bad hygiene in the washroom becomes even clearer.

Within this group, three out of four women (75%) will immediately leave the establishment if they witness poor hygiene. Again, businesses serving food and drink are held to the most rigorous standards given a remarkable 89% of women state they would never return to the establishment because of a dirty washroom.

But the consequences of a dirty washroom do not end there; 84% of women with the highest disposable income will tell their friends and relatives about an unpleasant washroom experience, spreading the bad perception via 'word-of-mouth' and leading to further potential loss of customers. Unfortunately for businesses, almost half (43%) of higher-earning women will not complain to the establishment, meaning the business would be none the wiser.

Privacy and personal safety are also highlighted, understandably, as important factors. 67% of women would never return to an establishment if the facilities were not private enough, while 61 percent would never return in the absence of a lock, or the lock is broken.

64% would prefer to find more luxurious brands than they use at home to enhance their washroom experience. 78% also like to use hand care products that feel luxurious on their skin, and 79% like products with luxurious fragrances. Therefore, the women with most disposable income are generally quite particular when it comes to the consumables on offer. Businesses providing consumables that deliver a luxurious feel, or a pleasant fragrance can help to enhance their washroom experience.

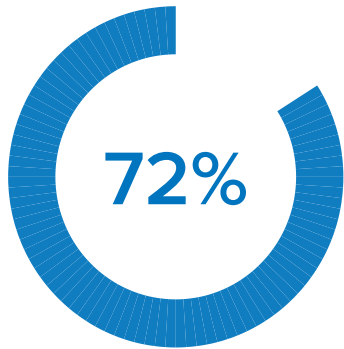
Businesses that cater to the specific needs of this premium market need to go further to provide an experience that matches these higher expectations.



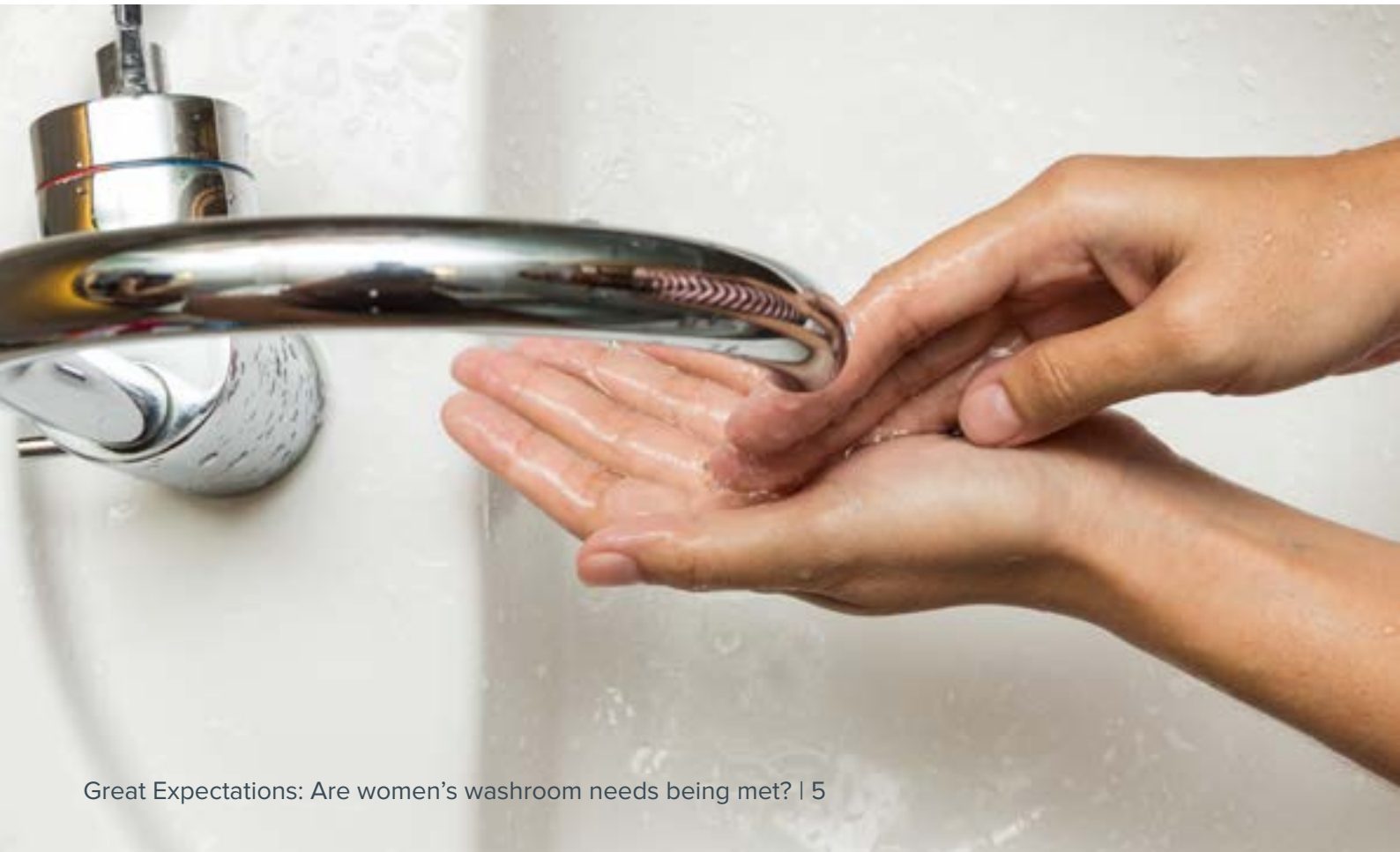
How do we meet women's needs in the washroom

So how do businesses ensure they meet women's needs in a public washroom to keep them coming back time after time? To give a good first impression to customers, it is incredibly important for businesses to understand what women are looking for in their ideal public washroom.

Many businesses, particularly hotels, bars and restaurants, choose to focus on offering an elaborately designed washroom which can become a talking point among the businesses clientele. There is no doubt that businesses must invest in their washrooms. A good impression starts with four essential rules:



of women try to avoid touching things that other people have touched in public washrooms.



Keep it clean

The first essential rule is cleanliness. Hygiene is vitally important to women with nearly all (95%) believing that handwashing prevents the spread of germs to other people. As a result, 72% of women try to avoid touching things that other people have touched in public washrooms, with over half using other body parts such as elbows and hips (62%) or toilet paper (60%) rather than their hands.

Public washrooms therefore have an important role to play in helping women to keep up good hygiene practices and encourage good health. Businesses can support women by providing touchless fixtures in their washrooms which help promote the highest levels of best hygiene practice and comfort. No-touch technology reduces the transmission of germs as it eliminates the need for any personal contact with washroom appliances. As 76% of women like to clean the toilet seat before sitting, businesses should also provide seat cleaner to limit the spread of germs from flushing known as the 'sneeze effect'.

Marti Barletta, an expert in marketing to women, explains, "Women recall more nuances in any environment, product, service or communication, and they care and express more about them. Women, first and foremost, want the public washroom to be germ-free and to appear to be clean. Touchless sink fixtures, 'no-touch' flushes and hand-dryers are all examples of ways businesses can appeal to women."



Keep it well-stocked

In addition to providing a clean and functional public washroom, women view a well-equipped washroom as the third essential requirement. One third of women (33%) have refused to use a public bathroom when there were no supplies such as soap or toilet paper.

Basic hygiene products such as soap (82%), paper towels for hand drying (71%) and a sanitary waste disposal bin (74%) are the key supplies and facilities women look for in a public washroom. Having said this, 86% of women also agree that the quality of consumables available such as soap, hand towels and hand cream does matter when they wash and dry their hands after going to the toilet.

In other words, both availability and quality of consumables is something that women think about.

Marti Barletta says, “Women are synthesisers, pulling all elements, details and context together to grasp the big picture. They expect the establishment’s surroundings to extend to the public washroom, and they expect the quality of the amenities to match up.

Women are more likely than men to notice that cheap, thin, scratchy toilet paper is out of place at a luxurious hotel, bar or restaurant. Likewise, women perceive a consistent availability of standard amenities, such as good quality hand towels, hand soap and lotion, as essentials of the ladies washroom.”

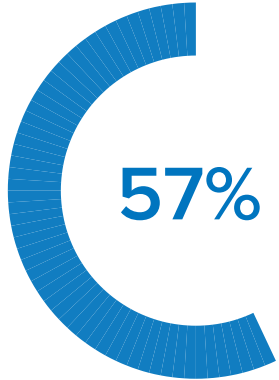
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Keep it smelling fresh

An overwhelmingly bad smell is one of the main deterrents for women using a public washroom, so an important consideration for businesses is keeping the air in the washroom smelling fresh. 41% of women have refused to use a public bathroom because of the smell, and 57% admit that the smell is the most important factor when electing whether to step into a washroom.

At the same time, 25% of women have rushed out of a washroom without washing their hands because they didn’t want to linger in a bad smell, which is even more reason to pay attention to the fragrance in a public washroom.

Businesses should think about providing fresheners or air purifiers to help maintain a pleasant smelling



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public washroom at all times. Nancy Puccinelli says, “Women are likely to be especially vigilant for signs of contamination in a public washroom due to the access that other people have to public areas.

A woman’s perceptions of the scent in a public washroom will extend to the brand. If there is a bad smell, individuals will look to not only exit the washroom but avoid the brand associated with the washroom.”

Marti Barletta says, “Putting practicality first, women will notice where a business has gone above and beyond to solve a public washroom issue. For example, providing handbag holders or hooks which accommodate more than a tiny purse would be most welcome in a public washroom, in the same way a women appreciates the bag hooks under a bar or restaurant counter.”

Keep it fit for purpose

When it comes to the design of a public washroom, women favour a functional environment over a highly decorated space. 59% of women view having enough space to move around easily without touching the walls, doors and toilet seat as essential. As more than eight in ten (81%) women like to take time to freshen up and look their best when using a public washroom, it is no surprise that 58% view a mirror as essential.

The ‘nice to have’ aesthetics hold less importance with décor (8%), background music (7%) and plants and flowers (6%) all ranking much lower when it comes to public washroom essentials.



A loyal brand following from women requires focus and commitment

All businesses – especially those in restaurants, bars and hospitality – must ask themselves whether they have paid enough care and attention to the women’s washroom experience. This, as we have shown, can have a sizeable impact on the overall female customer experience and on the business’ bottom line.

Think about a woman’s visit to the public washroom as part of her entire experience and consider whether her needs have been met. Are the basics covered? Is it clean, smelling fresh, well-stocked and fit for purpose? Regular queues for the washroom or for cubicles is a clear indicator that something is not right. Think about the fixtures, fittings and washroom layout. Solving the problem will be noticed and appreciated by female clientele.

The research and experts agree – some businesses with public washrooms have some way to go before women’s experiences match their needs and expectations, but small changes can make a big difference.

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Biography

Marti Barletta

Marti Barletta shows companies how to get more customers and make more money per customer - simply by getting smarter about women. As the author of Marketing to Women, Marketing to PrimeTime Women, and Selling to Affluent Women, Barletta has been quoted on CBS, ABC, MSNBC and NPR, as well as in The Wall Street Journal, The New York Times, TIME, Business Week and many other publications worldwide. A popular speaker, Marti has enjoyed rave reviews from audiences around the world who love her practical tactics, sense of humor and memorable stories.



Nancy Puccinelli

Professor Nancy Puccinelli is affiliated with the University of Oxford and the University of Bath. She is a Professor of Marketing and one of the world’s leading experts in consumer behaviour. Trained at Harvard, she is a recipient of the Who’s Who America award, which recognises leaders in education and industry, and has consulted some of the world’s largest companies. Nancy also regularly features in the media and has had her research widely published.



About Initial

We are committed to keeping you healthy by providing high quality hygiene products and services that minimise your risk of exposure to bacteria and other infectious micro-organisms.

We take pride in delivering the highest levels of service to enable you to keep your organisation looking good, feeling healthy and most importantly hygienic.

For more information, visit **www.initial.com**