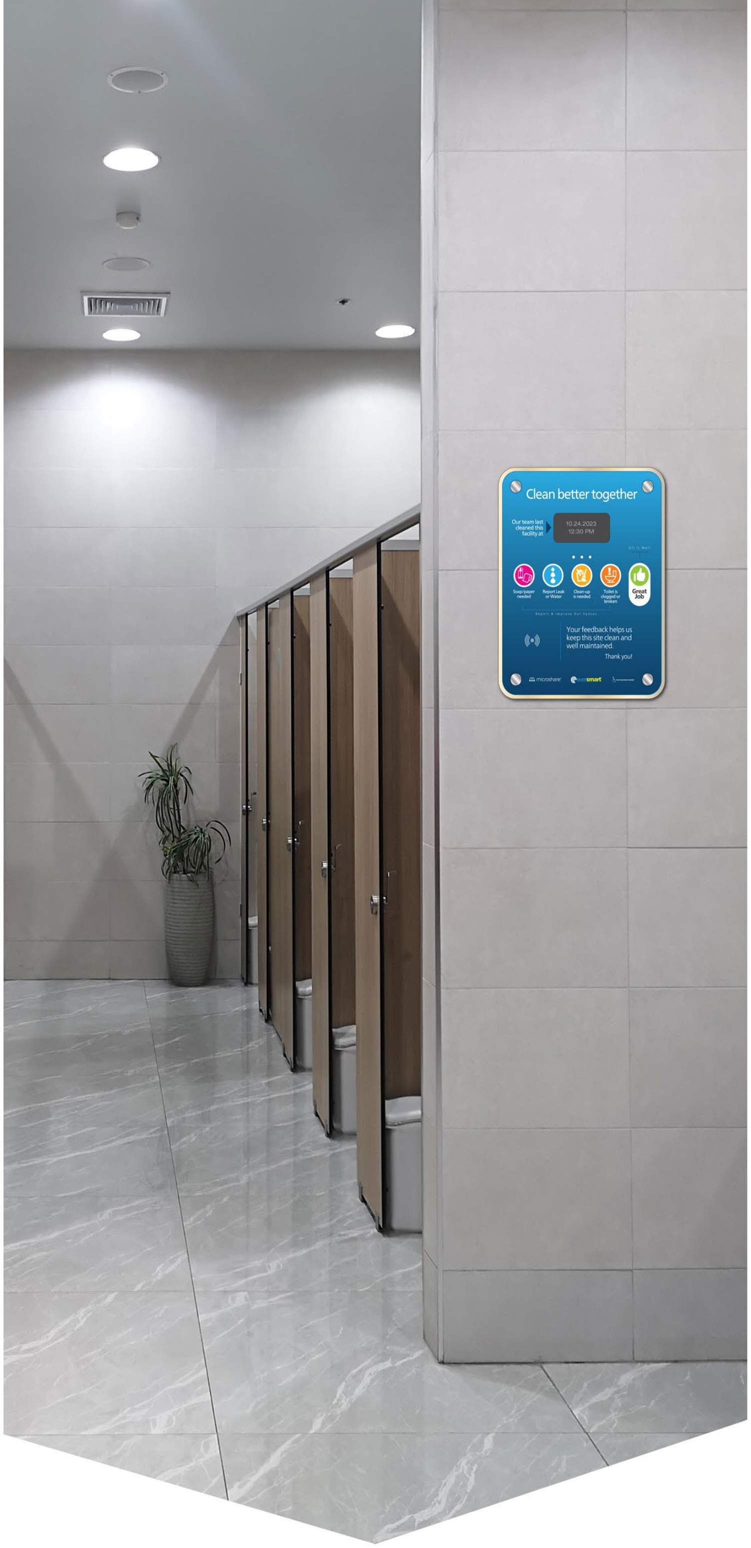

Keeping your brand out of the toilet:

The impact of clean washrooms on corporate reputation and customer loyalty

By Michael Moran and Finn Toennessen

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WHITE PAPER

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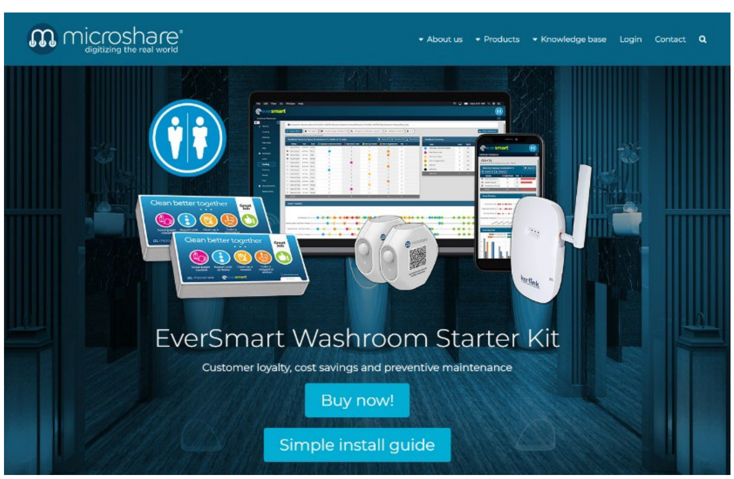
Executive Summary

In any industry that makes washroom and toilet facilities publicly available, brand reputation and customer loyalty is directly exposed to operational failure. From large retailers to motorway service areas, hospitals to coffee chains, sports venues to hotels to supermarkets, a positive corporate reputation is paramount for attracting and retaining customers. Alternatively, subjecting them to an unsanitary experience of any kind risks permanent damage to brand reputation and customer loyalty. And when food comes into the picture, the problem is even more acute. This white paper explores the crucial link between a company's reputation and the cleanliness of the public facilities made available to its customers. Drawing on research and data from various sources, as well as first-hand experience in the market, this paper highlights how washroom cleanliness affects customer perceptions and ultimately impacts business outcomes. It includes case studies, brand examples, customer surveys, statistics and field-tested evidence of how technology is playing a role in mitigating these risks.

- Traditional cleaning routines are unresponsive to customer concerns and prone to human error, laziness and high cleaning staff turnover rates.
- High standards of sanitation and maintenance are difficult to enforce on cleaning staff in geographically dispersed asset portfolios like restaurant, retail or hotel chains, arts & entertainment venues or other hospitality segments.
- Overlooked or mishandled maintenance incidents can lead to business disruption, expensive physical damage or even legal and regulatory risks.
- Poorly maintained or cleaned washrooms reflect directly on the corporate brand, posting a strong risk to customer loyalty, reputation and even staff retention.



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Introduction

To a shocking degree, from multinational corporations to small shops, senior leadership lacks an appreciation of the damage that an unsanitary or poorly stocked washroom can do to a hard-won reputation. In too many cases, the matter eludes absolutely executive attention, and thus supervisors either outsource the problem to a contractor or delegate the cleaning of public washrooms to the lowest person on the corporate totem pole.

It may seem to those in the c-suite that the condition of public facing washrooms is somehow beneath them. That blind spot can be costly. No similar task asked of a supervisory employee is treated with such cavalier disdain: Trash gets emptied, dress policies enforced, security routines verified, indoor temperatures monitored for optimum energy consumption and comfort. Yet ask someone ensure a filthy washroom is cleaned and the hunt will be on for anyone else to saddle with this chore. Somewhere in every organisation, it seems, is an unfortunate soul with a bucket on wheels and a mop just begging to be scapegoated. There's an old saying in the military: S*** rolls downhill. Sadly, it applies here in more ways than one. In too many cases, it flows toward the most important persona your company will ever interact with: The customer.

In fact, in survey after survey of customers, brand managers and marketing professionals, strong evidence exists to argue that the cleaning and servicing of your public washrooms directly impacts customer opinions of the larger brand. Does this company take public health standards seriously? Am I at risk of becoming ill just by being in here? Are staff the handling food or stocking shelves washing their hands properly? It's not much of a leap from there to outbreaks of E.coli or salmonella and the accompanying regulatory actions, business disruption and bad press such problems bring.

Why would an organisation that spends lavishly on things like health and safety training or "key man" insurance put the company's reputation at risk by neglecting this simple reality? Some of it comes down to enforcement, of course, across sprawling multi-jurisdictional corporate footprints. Yet to a surprising degree, the lack of attention paid to this issue reflects mediocre management and intellectual laziness. Creating and enforcing uniform standards for washroom sanitation seems like "mission impossible," as one operations director for a large German retailer recently told us. Yet some storied brands, including IKEA, Zurich Airport, the Gordon Ramsey restaurant group in the UK, make it a point to get it right. In fact, all of these challenges can be managed by prioritizing washroom cleanliness, by tweaking operational processes and by using technology to report problems and enforce responses before they become a crisis.

Proper washroom maintenance and servicing is a basic duty of care and a vital and overlooked aspect of the customer experience, known as CX in marketing speak. With the recent experience of a global pandemic still fresh in peoples' minds, consumers prioritise hygiene and the state of washrooms can significantly influence their overall satisfaction and peace of mind. This white

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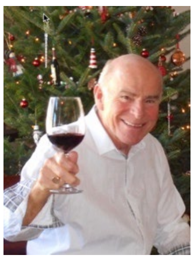
paper examines the connections between washroom cleanliness and corporate reputation, utilizing real world examples of companies that got it wrong, case studies of those who learned hard lessons, and industry insights about the available change management and technologies that exist to help take a risk that is hiding in plain sight off the table.

Flush twice: It’s a long way to the c-suite

A survey by the consultancy Facilities Management Advisor[i] reveals that 94% of customers consider washroom cleanliness crucial in assessing an establishment, which can impact their likelihood of returning. Clean washrooms not only reflect a brand’s commitment to quality but also significantly affect customer perceptions of overall service.



TJ Provost, a former lecturer for US-based culinary school Johnson & Wales, spent retired 45 years in hospitality industry. He says if a restaurant washroom is disgusting, or the windows or curtains are filthy, he knows the kitchen isn’t far behind. “If your guest sits down and consumes food and beverage then one of the most important areas within the establishment are the restrooms,” he says. “Does that room influence their return? Absolutely, yes.”

Corporate reputation includes stakeholder perceptions regarding a company's integrity, reliability, and commitment to service. As highlighted by a 2024 survey by Bradley Co., a fixture manufacturer, washroom reputation directly affects customer perception, influencing corporate reputation. Over 60% of 1,000 adults surveyed said they went out of their way to find convenience store brands that they knew maintained clean washrooms.[ii] In hospitality, which includes hotels, restaurants, convenience stores, museums, sports and entertainment venues, customer experience is essential, and a dirty washroom can create a negative impression and overshadow superior service elsewhere.

What is true in hospitality holds true for other industries, too. At **Zurich Airport**, which has won air travel industry awards as the best customer experience airport in Europe for 21 years running, a decision was taken to install EverSmart™ Washroom, a data-driven feedback and preventative data system[iii] from Microshare®, to ensure its high customer satisfaction expectations are enforced.

A customer reports an issue through an EverSmart™ Washroom feedback station installed in over 600 washrooms at Zurich Airport.

The product uses PIR motion sensors to anonymously monitor the traffic to a particular washroom to provide cleaning staff with real-time intelligence on where to concentrate cleaning resources. The product deploys a detailed feedback station that not only allows customers to register satisfaction or dissatisfaction but also report specific issues: Soap Out, Water on Floor, Toilet Clogged, Needs Paper. This is a crucial differentiator for facilities managers and brand stewards.

“This technology combined with data analytics will help increase efficiency in cleaning tasks and improve quality and employee empowerment,” said Daniel Amman, the airport’s head of

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commercial cleaning. "We not only see problems early, but can track response times of staff, too."

Case studies and real-world examples: Getting it right

It is highly unlikely any CEO or customer experience professional ever said, "I don't care about clean washrooms. They can use their own at home." But ordaining clean washrooms from a distant corporate headquarters is easier than enforcing those standards in far flung franchise locations. Even some of the world's most efficient and profitable firms struggle with this conundrum.

Yet some consistently get it right. Along with Zurich Airport, another name that regularly tops industry rankings for customer service **IKEA**, the Nordic home goods giant with a reputation for approaching these issues with Nordic precision Where many other retailers leave customers wondering whether or not washroom facilities are even on offer, IKEA brags about their facilities publicly. "Each store offers family friendly toilets located in all toilet areas as well as nursing and changing facilities," its corporate website notes. "These contain step stools and toilet seat boosters in each family toilet cubicle and there are nappy vending machines and pull-down changing tables in both male and female toilets, with separate changing facilities available."

Another success story is **Chick-fil-A**, a US-based fast-food chain that is as well known in its home market for its clean washrooms as its famous waffle fries. From the top down, Chick-fil-A places strong emphasis on washroom cleanliness. The chain implements strict cleaning protocols and regularly trains staff on hygiene standards. Surveys have shown that this attention to washroom cleanliness contributes significantly to customer satisfaction scores, reinforcing the brand's positive reputation and driving repeat business.

"New team members receive training covering customer service, food preparation, and cleanliness standards, in addition to ongoing skill development after they start," says Ryan Magnon, senior principal operations lead at Chick-fil-A."[iv]

The benefits extend beyond customer experience to internal morale and efficiency, too. A 2024 survey by European Cleaning Journal concludes that one in five employees across the continent refuse to use the washroom facilities at their place of work due to "low levels of cleanliness coupled with a lack of sanitary supplies such as toilet paper and hand towels." This risks creating a doom loop of outcomes, from morale problems to low retention rates right down to staff inadvertently contaminating colleagues or consumer products due to poor sanitary conditions. It doesn't take a survey to prove that disgruntled staff are less likely to go out of their way to please customers.

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Deadly damage for getting it wrong

On the other end of the spectrum, some of the world's largest and most famous companies have experienced crisis-level issues that can be traced to poor washroom standards. Take the case of **Buitoni,** the global frozen pizza company owned by **Nestle**. In 2024, French authorities charge Nestle France with involuntary manslaughter in connection with a 2022 e coli outbreak that sickened dozens and led to the deaths of two children. The company closed the plant and reached a compensation agreement with 63 impacted families who will receive an undisclosed sum.[v] The source of the outbreak remains undisclosed under the compensation agreement, but insiders have told media that the plant's sanitary facilities were grossly insufficient for the size of the workforce and that rodents were present in the food processing areas. Nestle continues to suffer reverberations from the incident years after disposing of the plant.

French prosecutors probe death linked to E. coli at Nestle pizza plant

By Reuters

May 12, 2022 9:11 PM GMT+1 · Updated 3 years ago

[1/2] Buitoni frozen pizzas, part of the Nestle portfolio, are pictured in a shop at the company headquarters in Vevey, Switzerland, February 15, 2018. REUTERS/Denis Balibouse Purchase Licensing Rights

Global coffee giant **Starbucks** has struggled with a very different challenge. With more than 38,000 outlets globally, each of them has traditionally offered public washrooms. In many communities, particularly in the public washroom desert of the United States, the Starbucks café is the only public washroom available. Inevitably, this leads to challenges and in some areas, from homeless seeking some relief to the extra burden on staff to service a high traffic washroom. In January, the company finally threw in the hand towel, banning the use of its facilities unless someone has made a purchase. "There is a need to reset expectations for how our spaces should be used, and who uses them," said Starbucks North America President Sara Trilling in a letter to staff explaining the change.

Much of this was driven by the negative impacts on Starbucks' brand that resulted from heavy usage of its washrooms and the inability of already overwhelmed baristas and other café staff to service and clean them. The benefits of getting this right cannot be understated. Particularly in an era when social media turns every person into a potential whistleblower, the same holds true for winning praise. It may be that people are more motivated to report bad rather good experiences, but the good does get reported – and the halo can be significant.

Great examples of this are roadside rest stop and convenience store chains, which compete each year to win the kudos as the best place to make the family pit stop. In Germany, **the ADAC,** the national auto club, rates rest stops around the country's vaunted Autobahn routes for washroom cleanliness, supply and maintenance, plus the price and quality of any food on offer.[vi]

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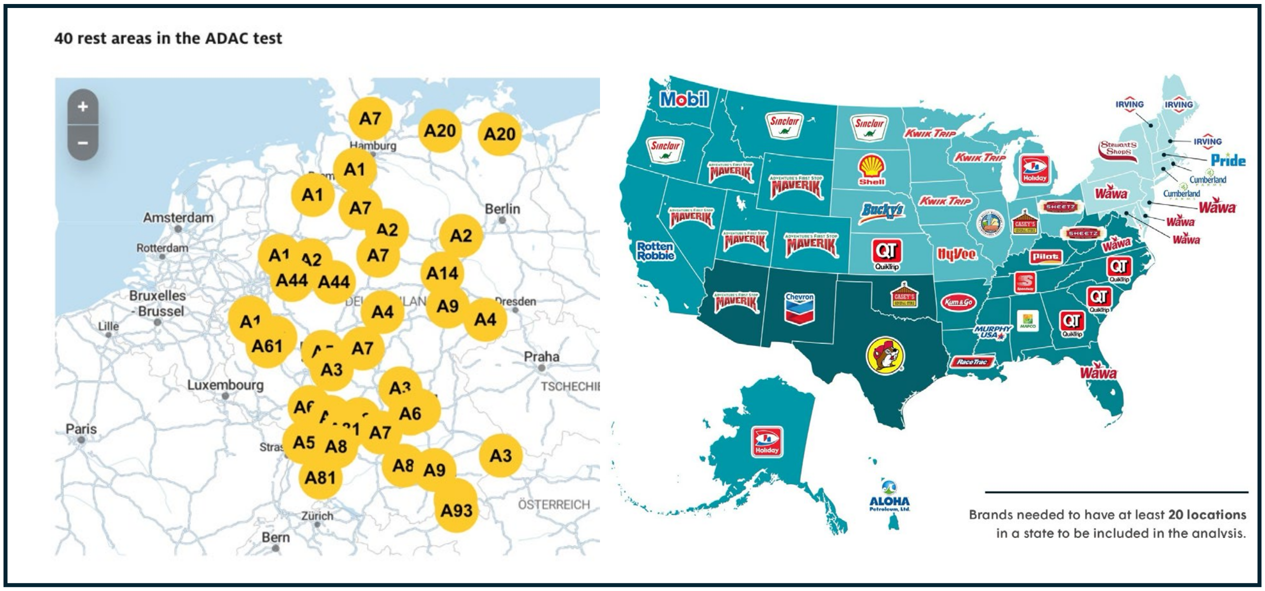
In its most recent report, ADAC found acceptable sanitary levels nationwide, with the best being found in Bavaria, home to the famously fastidious Swabian housewife of national legend. But ADAC was disturbed to find most rest stops have now installed a pay toilet system manufactured by Sanifair and costing €1 euro a pop (or, perhaps more relevantly, €1 a poop). "The proportion of facilities with automatic toilet seat cleaning was high," the report noted. "However, one in six of them did not work properly at the time of the test. The Sanifair system was disappointing in this respect."



Above: Left, the ADAC's Rest Area Test, 2024; Left, Gas Buddy's annual "What a relief" survey

A similar nationwide poll appears in America right before the summer driving season. **Gas Buddy**, a fuel savings app, drives significant business to the winning brands over the course of the season by laying out who bothers to clean the toilet seat and refill the soap dispenser. This can lead to millions in revenue increases for those rated favorably.

The **Marriott** hotel chain, for instance, regularly gets high ratings for the state of its washrooms. The double-edged sword here, of course, is that those ratings attract people unlikely to spend the night (or spend a euro) to use the facilities. Nonetheless, Marriott regards high washroom standards as a key component of brand reputation. They global chain staked out a high-profile leadership position in the hotel industry during the pandemic,[vii] launching a "Global Cleanliness Council" to provide coordinate the hotel industry's response. For a company with deep pockets – Marriott is the world's largest hotel chain – spending lavishly on such initiatives makes huge sense.

Case studies and real-world examples: Getting it wrong

In Europe as opposed to America, public toilets maintained by municipalities or transit systems are widely available. While their condition varies enormously, they pose little risk to corporate reputations even if regional or national pride may take a hit.

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For restaurants, hotels or other private businesses, however, there is a lot at stake. Many weigh these risks and simply decide against offering toilet facilities to their customers. For instance, supermarkets and large retail outlets across Europe often do not offer facilities, referring customers to widely available public facilities.

That is not an option for some firms in Europe, where customers – often seeking a little bit of home while abroad – have come to expect washrooms to be in

Fast-food giant **McDonald's** has issued regular public statements on the question of its washroom cleanliness and spent millions on expensive consultants. Yet McDonalds has not solved the problem. Indeed, once you're issuing statements about your filthy bathrooms, the problem has gone too far. Preventing that situation should be the goal.

McDonald's restaurant portfolio is 39,000-strong and located in 40 countries. The company has drawn criticism and official complaints regarding washroom conditions in various locations. In recent years, negative reviews on social media platforms due to unclean washrooms have proliferated, a sign both of widespread social media adoption and a diminishing tolerance for fetid washroom conditions. This reflects poorly on the brand's reputation, and its corporate leadership knows this. There is also some evidence that such issues (and McDonald's isn't the only burger chain facing this problem) leads to decreased foot traffic and customer retention.[viii]

In Europe, it is not hard to find complaints online about filthy McDonald's washrooms. "The washrooms are dirty and disgusting," said a post on a McDonald's experience in the Italian capital on TripAdvisor, a widely visited travel site.[ix] "This place should not serve food. It is extremely unhygienic to use this hand dryer and touch food right after. I hope employees wash their hands in a different, cleaner bathroom."

'The washrooms are dirty and disgusting. This place should not serve food. It is extremely unhygienic to use this hand dryer and touch food right after. I hope employees wash their hands in a different, cleaner bathroom.'

- *TripAdvisor post on McDonald's outlet in Rome.*

Meanwhile, at Hamburger Central (McDonald's Chicago headquarters), the search is on to figure out why, other than cyclical price issues, foot traffic and customer loyalty is dropping. "Value is not limited to price, and experiential aspects like cleanliness and convenience account for about a quarter to a third of consumers' value perception," says McDonald's CEO Chris Kempczinski. He adds that McDonald's plans to improve these experiential elements to draw in customers.

Sadly, McDonald's still makes the Restaurant Business magazine "Top Five Worst Bathrooms" list[x] in 2024, so there's work to be done. Interestingly, Chick-fil-A ties for No. 1 in the more desirable "Top Five Best Bathrooms." McDonald's should study what they're doing right in Atlanta. Interestingly, Burger King, which like all burger franchises has had its struggles with washrooms and customer experience, is testing EverSmart™ Washroom technology in some Scandinavian outlets with an eye toward breaking the reputational doom loop.

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Walmart, the retailing giant, which also owns the **ASDA** chain in the UK, has felt similar pain. Known more for its fabulous management of a global supply chain, Walmart has not fared as well with the public washrooms in its 10,500 stores in 19 countries. Reports from internal surveys indicate that many shoppers have opted to leave stores without making purchases due to unclean washrooms, showcasing again how poor cleanliness can adversely affect sales and customer loyalty.

'One in three customers will leave a brand they love after just one bad experience, while 92% would completely abandon a company after two or three negative interactions.'

- PWC, 'Customer Experience is Everything: Here's How to Get It Right

This is particularly upsetting for retailers in light of recent academic research suggesting that "customer toilets are considered as an important store attribute and, more importantly, the use of toilets is associated with prolonged in-store time which, in turn, increases spending."[xi] Maybe that will get their attention.

Retailers do not necessarily feel compelled to follow these rules, however. **Carrefour**, the French supermarket chain that is the world's seventh largest retailer, does not offering customers toilet facilities and has announced no plans to change that policy. Alternatively, two German rivals, **Aldi** and **Lidl**, are in the process of redesigning many of their European stores to make public toilets available. "All our new stores have toilets you can use," a spokesman for Aldi Ireland said. "The older shops only have staff toilets at the minute (but we're working on it)."

This might lead some to wonder: Why bother? In Europe, where public facilities are generally available, is it worth risking your reputation by allowing customers to use a washroom that will invariably be associated with your brand.

The British firm PHS commissioned a study that found that 66% of consumers have walked out of a venue because they lacked or those toilet facilities were dirty.[xii] Another found that, in retail and department stores, one quarter of 1500 consumers surveyed in the US said they had left a store without making a purchase after finding there were no facilities available or encountering a dirty washroom. More than half said they would never return.[xiii] This data underscores the financial implications of having a public washroom and making sure it is kept clean.

Tapping technology to get it right

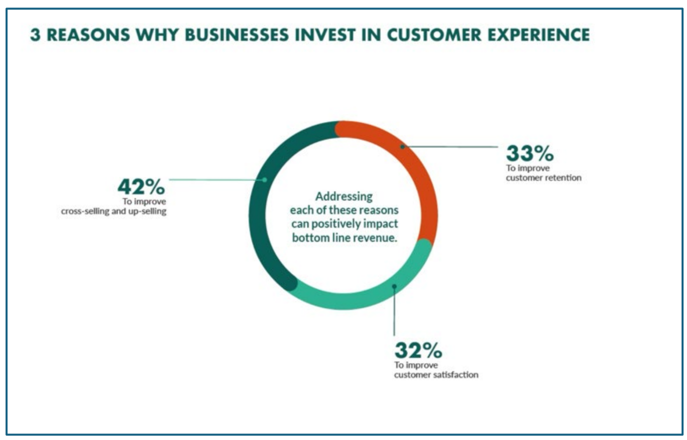
Deploying technology solutions can significantly mitigate washroom cleanliness issues. Many hospitality brands are exploring the integration of smart cleaning technologies that ensure washrooms are regularly monitored and maintained:

- **Sensor-Enhanced Cleaning**: Internet of Things (IoT) sensors can monitor washroom usage anonymously using Passive Infra-Red (PIR) technology rather than invasive cameras. The data these sensors produce, when properly managed and delivered, can flag cleaning needs and potential maintenance problems in real time, allowing staff to address issues proactively. In some cases, they can prevent costly flooding, injuries or legal liabilities.

- **Automated Cleaning Solutions**: Robotic cleaners are emerging in the hospitality sector, capable of maintaining washroom hygiene more efficiently and consistently. They remain expensive and experimental at this writing, but the future clearly will involve a degree of robotic cleaning.

- **Touchless Systems**: Implementing touchless faucets, soap dispensers, toilet flushing and hand dryers can reduce contact points, enhancing the perception of cleanliness and safety, as well as bring a sustainability benefit in the form of more efficient energy and water use.

PwC notes that technology needs to be in an intimate dance with humans for it to have an impact. Technology for technology's sake "is only noticed by the consumer when it fails." Technology that enables a better customer experience, like the ability to report problems in washrooms, enhances customer satisfaction.



"Good customer experience minimizes friction, maximizes speed and efficiency and maintains a human element, embedded within the automation, AI or other technologies," PwC reports.[xiv] "It leaves consumers feeling heard, seen and appreciated. It has a tangible impact that can be measured in dollars and cents." The connection between washroom cleanliness and corporate reputation is critical in the hospitality and retail sectors. As consumer awareness of cleanliness continues to rise, businesses must prioritize hygiene standards to meet expectations and protect their reputation. Case studies demonstrate that brands like Chick-fil-A and Marriott benefit from high cleanliness standards, while others, such as McDonald's and Walmart, illustrate the consequences of neglecting washroom maintenance.

Business interruption: The other washroom risk

Looming behind a dirty washroom are an army of national, state, provincial and municipal health regulators who have the power to fine, shut down and publicly shame businesses deemed a threat to public health. Restaurant, grocery, hotel, and hospitality groups have faced shutdowns or severe penalties from such health and safety regulators due to sanitation violations, including issues related to washrooms.

Specific details about every case may vary, including rodent or insect infestation, poor food storage or handling, but almost always there is also a problem with washroom hygiene. Filthy public washrooms that fail to provide basic sanitation for customers or food-handling staff are a

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ticket to being shut down by health officials, along with the base press and lingering reputational damage that brings.

The shutdowns often stem from repeat violations of health codes, which can include dirty washrooms and failure to address previously cited issues. These closures serve both as a public safety measure and a warning to the establishment and others in the industry regarding the importance of maintaining hygiene standards. Following a shutdown, businesses typically undergo thorough inspections and must implement corrective actions before being allowed to reopen.

While restaurants or grocery stores may reopen relatively soon after issues are remediated, the lost revenue of the shutdown period pales next to the damage bad publicity will do. Across the European Union, public health inspectors publish lists of restaurants that fail to meet standards, and in the worst cases shut them down until problems are dealt with. In Ireland, for instance, the national Food Safety Authority (FSA) maintains a website for public complaints and is quick to act upon them. Nationwide, some 115 restaurants were shut down as a result of subsequent inspections.[xv]

Spain experienced a wave of closures in January in the Andalusia region as food poisoning spiked and inspectors scoured the region's restaurants. Both Italy and Germany reported high rates of e coli infection in 2024, including seven deaths across the EU.[xvi] Increasingly, medical research suggests the culprit in these outbreaks is not contaminated raw meat or vegetables but a lack of sanitation at the site of the outbreak – namely the improper washing of hands among food-handling staff. Researchers at the University of East Anglia in the UK, upturning conventional wisdom, reported after an exhaustive study in 2019 that raw food contamination is not the most likely source of e coli outbreaks. ""Rather — and unpalatably — the likeliest route of transmission for ESBL-*E. coli* is directly from human to human, with fecal particles from one person reaching the mouth of another," says study author Dr. David Livermore.[xvii]

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In the United States, perhaps the most famous example of this problem involved both poor washroom sanitation and poor food handling practices at the nationwide restaurant chain **Chipotle Mexican Grill**.

In 2015, several Chipotle locations were forced to close temporarily due to multiple health violations, including unsanitary conditions in washrooms that officials believe contributed to foodborne illness outbreaks. Outbreaks of several foodborne illnesses spread, including e coli, and the company's share price fell by half as the problems continued and management struggled to formulate a response.

E. coli infections linked to poor hygiene, not contaminated food

The bacterium *Escherichia coli* is normally present in both human and animal guts. However, some strains of *E. coli* have developed resistance to antibiotics and can cause dangerous infections. But how do these harmful bacteria end up infecting people?

A new study warns that humans come into contact with dangerous bacteria, mostly because of poor hygiene practices.

Millions of bacteria naturally populate the guts of humans and animals alike, with different species coexisting in a fine balance that ensures a state of health.

Eventually, Chipotle agreed to pay the US Justice Department $25 million to resolve criminal charges[xviii] leveled against the company. Far more was paid in undisclosed settlements with sickened customers, and the costs incurred stemming from shuttered stores, new training regimes and physical upgrades in the chain's restaurants and the massive hit to customer loyalty have been estimated at $100 million. At the height of the crisis in 2015, the company had lost $8 billion in value as measured by its share price.

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Conclusion: Confront risk, modernise your processes, deploy technology

The pandemic brought to the fore the importance of proper washroom hygiene under extraordinary circumstances. With that period fading into memory, however, a "business as usual" approach may take hold, sowing the seeds of future trouble. So how do we neutralize the risk posed by this seemingly mundane issue to a brand's reputation, its ability to grow sales, to attract and retain both customers and employees, and to public health more generally? Here are a few ideas:

1. **Confront and air the problem**: The first step in tackling any challenge is admitting it's a problem. Washroom cleanliness and maintenance doesn't often show up in the CEO's shareholder meeting transcripts (I know, I checked), and yet for a number of the enormous firms cited in this paper and for many others, too, it is a serious issue that poses a drag on or at least a risk to growth. Corporate leaders have few more impactful opportunities to mobilize their entire workforce on an issue than these investor calls. It's not a topic beneath you and it is not irrelevant to the growth and performance of your company. In fact, it is your job to put such wrongheaded ideas aside and flag it as a priority. From there, it is imperative to let your direct reports – particularly those in brand management, marketing, customer experience and facilities management that you were not engaging in "bathroom humour." You are determined that the company will get washroom sanitation and maintenance right as part of a larger push to constantly improve customer experience.
2. **Examine and improve current business processes:** What is it you're doing now? From the customer up to the c-suite down, what are the touch points and responsibilities directly or indirectly related to the condition of your washrooms and the experience your customers have inside them? What data do you have to work with to measure mechanical and supply problems? What about staff responses to them? Are you measuring customer satisfaction seriously or do you just have one of those dumb smiley face things in the washroom? How many toilets clog per week? How many water leaks do you experience? Were there injuries or serious mishaps in your washrooms? All of this bears examination, and where you have no answers, you need to find them.
3. **Deploy technology to help provide visibility and enforceability:** Your people – the human capital of your company – are your most important asset. This is particularly true for staff who will interact or at least been seen by or directly impact customers. But they will need help managing things like traffic flow to know when a particular washroom is being overwhelmed, user feedback to report problems, and it doesn't hurt to implement a check-in system that logs responses to crowd-sourced maintenance or supply requests.

Technology alone will not solve this problem. Sanitation, after all, is one of the most basic of human problems. But technology can empower a motivated, incentivized and well-trained workforce to minimize these risks. By acting on this issue before it becomes a viral staple of your brand on Instagram, TikTok or Facebook, companies can reduce the chances and take away much of the unpredictability. What's more, you will have an answer and a plan in place when someone asks, "What if?"

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