



KING·CASEY REPORT

Insights and Trends in Retail Branding, Merchandising and Design



The Forgotten Bathroom Zone
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A KING-CASEY REPORT by Howland Blackiston, Principal, King-Casey

Momma Always Said...

Mom had no interest in business matters. But she had an uncanny instinct for judging the health of a business. Her barometer of an establishment's viability was the condition of the restrooms. With a matter-of-fact quip she would predict, *"I was in Schraffi's* today. They're going to go out of business, because the ladies room is a disaster."* There were numerous such prophecies and they were all 100% on the mark. Many months before the fiscal realities had made their way into the business journals, Mom's Restroom Report had peg-marked the demise of Childs, Patricia Murphy's, and Horn & Hardart. Now they are long-gone — and that would be no surprise to Mom.

Tidy Bowls

Beat Tasty Food

You might think that a restaurant's food is the most critical attribute for success. Wrong. In the March 2004 issue of QSR magazine, a Sandleman & Associates report listed "Cleanliness of Restaurant" as the number-one attribute customers listed as most important to them when selecting a quick-serve or casual dining venue. Customers put very high value on whether a place is clean or not. Ray Kroc knew that decades ago, when he made clear that clean restrooms had top priority at McDonald's.

Our work with restaurants supports that finding and puts an even sharper focus on this key attribute. Customers continuously tell us how important a clean restroom is. In fact, they seem to equate clean bathrooms with clean kitchens. A "tidy bowl" is an attribute ranked higher than menu, service or atmosphere! But the restroom is one "zone" in a restaurant that seldom receives the same business scrutiny as others. If clean restrooms are so important to customers, why aren't restaurants giving restrooms the same analytical attention as their menus, merchandising, dining areas, and service? That may be because little has been done to objectively study this attribute. How can we better understand and measure the quality indicators of a clean restroom? We took a closer look.

We Asked Customers What's Most Important

King-Casey and The Branding Idea joined forces to conduct a "pilot study" among 100 restaurant consumers. We wanted to find out what value customers put on clean restrooms; how deeply they equated clean restrooms with clean kitchens; and what are the specific qualities they look for in restaurant restrooms. A better understanding of these details would help any restaurant take corrective action to keep their business from going down the drain.

Clean Restrooms Indicate a Clean Kitchen

78% of those surveyed agreed that a clean restaurant restroom is a strong indicator of a clean kitchen. In fact, the more upscale the restaurant, the stronger the belief. Women believed this more than men. Perhaps even more interesting was the fact over 94% of those surveyed felt that restroom cleanliness is more important *today* than ever before. The reasons they cited come as no surprise. The media is full of stories about all kinds of diseases (SARS, West Nile Disease, Hepatitis, etc.) and the associated emphasis on washing hands as the best preventative from getting many diseases and the flu.

Gimme Clean Toilets!

The leading quality indicator among all customers came as no surprise: "clean toilet." This was followed by attributes of cleanliness like "clean area around toilet," "no sticky floors" and "no trash." These attributes held up for all types of restaurants and were equally important for both men and women.

Other Quality Indicators

Another important indicator of a quality restroom was the posting of a written "guarantee" signed by management and underscoring their belief in providing customers with clean bathrooms. Customers

* In the 1950's there were more than fifty Schraffi's restaurants in New York City. The last Schraffi's closed in the 1980s.

also put value on “soft absorbent toilet paper” (as opposed to the industrial variety that is often thin and waxy). And those surveyed told us that hooks on stall doors were important (providing a place to hang coats, pocketbooks and shopping bags).

Last But Not Least

Ranked at the bottom of the list of quality attributes were “vending machines” and “advertising/promotion.” Customers felt that these features were equated with *non*-quality restrooms. Something to keep in mind for those brands favoring such a practice.

Fancier the Restaurant Fussier the Customer

Some quality indicators increased their ranking as customers went upscale from quick serve restaurants (QSR), to casual dine restaurants, to fine dining restaurants. In the fine dining category, the following restroom quality attributes gained significance:

- In fine dining establishments, customers expected to feel comfortable, cared for, soothed and pampered. These attributes ranked low for QSR’s.

- Make-up stations in the ladies room were an expected part of pampering in fine dining establishments. The same was true for the use of cloth hand towels.

- Drop ceilings were no problem in QSR’s, but they signaled poor quality in fine dining establishments.

- Bright lighting was considered important in QSR bathrooms, but soft lighting was the preference for Fine Dining establishments.

- “Family Restroom Stalls” were ranked important for QSR’s and Casual Dine, but not for Fine Dining (where we can assume it is more likely that the kiddies have been left at home).

Based on the shifts in ranking across restaurant types, we can conclude that the mindset of customers using QSR’s is to “get in and out quickly as possible.” Whereas in Fine Dining establishments, the mindset is to linger and be pampered as part of the more upscale experience.

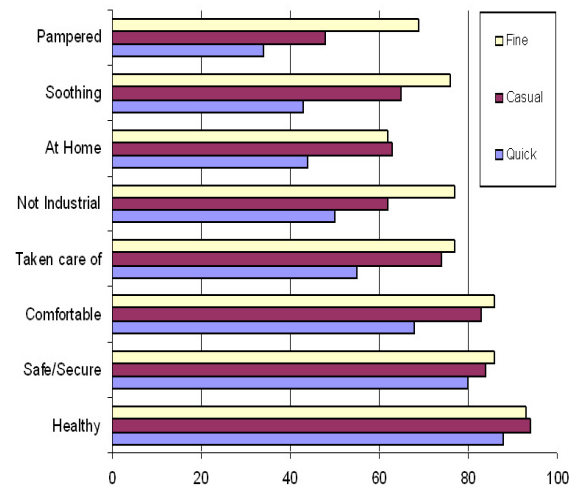
Male vs. Female

We launched the survey quite convinced that we would see a significant difference in how men and women ranked restroom quality attributes. That turned out *not* to be the case. As the chart shows on the previous page, men and women rated key quality attributes equally. Women seemed consistently more in touch with their emotions than were men.

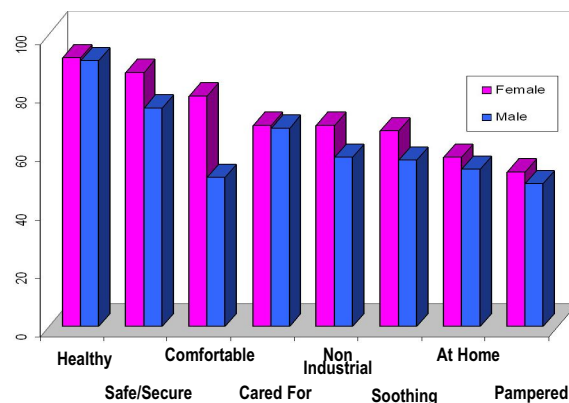
Don’t Forget The “WOW” Factor

At the conclusion of the survey we asked customers to help us identify “best practices.” We wanted their nominations for “best restrooms.”

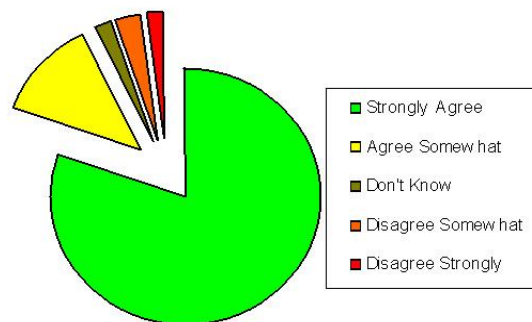
Interestingly a new quality attribute emerged. They didn’t necessarily cite the most sparkling clean restroom they ever visited. Instead they began to tell us about restrooms that had dazzled them with decor and innovative design



In this chart we see that while basic tangibles such as safety and sanitation were just about equally important across restaurant types (Quick Serve; Casual Dine; Fine Dining), the more “emotional” attributes (pampered, soothing, homey, etc.) gained greater importance as the “grade” of the restaurant increased.



Pretty much across the board, women (pink bars) and men (blue bars) rated key quality attributes equally. Women (more than men) seemed consistently more in touch with their emotions relative to restaurant restrooms.



94% of those surveyed felt that restroom cleanliness was more important today than ever before (a likely reaction to media awareness of communicable diseases, such as SARS and West Nile).

The Methodology

We began this project by conducting ten in-depth telephone interviews with restaurant consumers. We asked them to tell us what indicators of quality they looked for in restaurant restrooms. Their responses resulted in a list of 53 key quality indicators. These indicators served as the basis for the survey. The survey was sent to 50 men and 50 women (to see if there would be a gender difference). Surveys were prepared for three restaurant types: Quick Serve (QSR), Casual Dine and Fine Dining (to see if there would be a difference by type).

Participants were asked to rank the key quality indicators on a scale from 1 to 10 (from not important to extremely important). This highly sensitive scale makes the data stable at lower sample sizes.

We averaged the scores for each key quality indicator. If an indicator had an average score of 8.5 out of 10, it received a score of 85. The indicators ranged from a low of 36 to a high of 93.

features. We heard about stunning wall treatments, elegant fixtures, vases with fresh flowers, mood lighting, and even technological wizardry (ever see those LCD privacy panels that go from clear to opaque when you latch the stall door?). So although customers love clean restrooms, what they remember most clearly are those clean restrooms that also have a “wow” factor. Upon reflection, that’s not surprising. Customers expect certain basics in your dining area (clean room, clean plates, clean glasses, functional layout and pleasant decor). But what they remember (the *real* competitive edge) is often more architectural. A brand can be distinguished by the design elements that set you apart in the market. So it’s likely that a little more “wow” in your restrooms also contribute to brand recall, distinction and your customers’ perception of quality. Here’s an area where many brands are missing an opportunity.

Use a Zone-Specific Improvement Strategy

Typically tons of thought and resources go into distinguishing the exterior and interior trade dress of a restaurant brand. And plenty of effort goes into getting the menu and menuboards just right. But seldom does as much research, planning and design go into the bathrooms. They’re often built with a cookie-cutter sameness.

Why are restrooms the unforgotten zone in restaurants? Typically restaurants plan improvement strategies based on a holistic view of their environment. They don’t recognize that in fact, their restaurant is a series of many different “zones”. Each zone is unique. And each is used by customers in a unique way. By better understanding these zones and how customers will use them, you can develop zone-specific brand solutions that make your customer’s experience highly efficient and far more pleasant. COZI® (Customer Operating Zone Improvement) is King-Casey’s proprietary methodology for understanding customer needs, attitudes and behavior in the environment.

King-Casey is a pioneer in retail consulting and design. For more than half a century, we have been building competitive brands for a broad array of retail companies by dramatically improving the customer experience at every point of contact. King-Casey provides a complete range of services including assessment, research, branding, visual merchandising, retail store design, and rollout. We develop innovative solutions that result in increased customer loyalty, higher sales and greater ROI.

King-Casey has been particularly successful in helping restaurant brands optimize their guest communications, menuboard and menu systems, having worked with many of the leading QSR, Fast Casual and Casual Dine concepts.

If you would like to discuss the development of meaningful business strategies for your business, please call Howland Blackiston at King-Casey. Telephone (203) 571-1776. Or visit our website: www.king-casey.com

A Few Easy Fixes

You are likely to spend a lot of time, energy and resources to get the quality of your food and service just right. But don’t ignore your restrooms. Customers tell us that the quality of this zone is more important to them than your menu, service or atmosphere. So make your restroom a key quality zone. The quality of your restrooms might significantly impact your customers’ experience at your establishment. You’ll need to identify key measures of quality and get them on your radar screen. Give someone ownership. Make sure the “restroom report” becomes a regular part of your business review.

A few simple “fixes” can make a big difference in how your customers rate your establishment. Here are a few ideas:

- Clean toilets are a must. Schedule regular cleanings and frequent quality checks throughout the day. Make certain there is never any trash on the floor or counters. Even if the restroom is technically sanitary, trash gives the customer the distinct impression that you have a dirty restroom.
- Post a restroom guarantee. Address the customer’s belief that a clean restroom means a clean

kitchen. Let customers know that you understand that an Immaculate restroom is important. Encourage customers to let you know if the restroom is not up to snuff.

- Post the time/date of the last cleaning and by whom. This reinforces to the customer how important clean restrooms are to management, and it provides clear accountability for maintenance.
- Add extra toilet tissue dispensers and towel dispensers. Don’t ever let your customers run out of these basics!
- Use soft, absorbent toilet paper instead of that horrendous industrial stuff. Customers will appreciate it.
- Make sure to install hooks in stalls. Place them high enough to protect pocket books and to allow for long coats.
- Add privacy panels between urinals in the men’s restroom. This is an inexpensive retrofit that pays off.