

The Essity Inclusive Hygiene Report 2026

A deep dive highlighting how washrooms are the hidden gems that can shape customer behaviour and unlock revenue growth for your business

essity.com

essity

Contents

03 Introduction

05 Section 1: Customer expectations

08 Section 2: The value to your business

11 Section 3: Inclusive hygiene in practice

14 Conclusion

15 Methodology



Introduction

How washrooms can shape customer behaviour and unlock revenue growth for your business.

At Essity, we believe that when we're away from home the ability to use a washroom comfortably and safely should be considered a basic human right – a critical component of maintaining our health and well-being. As hospitality business owners and managers, we're sure you agree, and want to know that your customers have the washroom facilities they're comfortable using when visiting your venue(s).

But how much of a factor does inclusive hygiene play in your washroom decision making? Are you certain that you're meeting the diverse needs of all your customers?

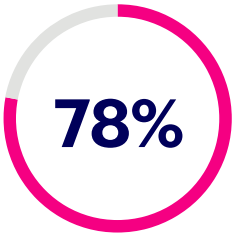
True inclusive hygiene means not only supplying critical bathroom supplies and maintaining cleanliness, but creating an environment that removes barriers and better meets people's different needs – whether that's including needs related to neurodivergences, skin and health conditions, or those related to different stages of life.

Essity is on a mission to understand the true impact of inclusive hygiene on commercial success, and the potential cost to your business if customer expectations are not met. We interviewed over 5000 UK adults and 1000 hospitality business managers to paint a picture of the state of inclusive hygiene in washrooms across the nation.

And the results are clear... **inclusive hygiene matters to your customers.**

56% of the respondents we surveyed told us that an excellent quality washroom would make them spend more, stay longer or return – with toilets that exceeded expectations leading visitors to part with as much as £4.50 more than usual in a single visit. This means that, if customer needs are not prioritised, the hospitality industry could be potentially missing out on a staggering £491,828,224 in revenue.

So, what else did we uncover? Let's flush out the facts.



of respondents stated that **they would** choose a venue with inclusive hygiene in its washrooms over another similar venue.



likely to spend **more money** there as a result.



James Cartwright
Commercial Director, Professional Hygiene UK and ROI

Introduction

About Tork

The Tork brand offers professional hygiene products and services to customers worldwide, ranging from restaurants and healthcare facilities to offices, schools and industries. Our products include dispensers, paper towels, toilet tissue, soap, hand sanitizers, napkins, wipers, but also software solutions for data-driven cleaning. Through expertise in hygiene, functional design and sustainability, Tork has become a market leader that empowers customers to think ahead and improve business outcomes through sustainable hygiene management. Tork is a global brand of Essity, and a committed partner to customers in over 110 countries.

What is Inclusive Hygiene?

We define inclusive hygiene as ensuring that as many people as possible have comfortable access to washrooms, regardless of their health conditions, abilities, neuro-diversities, general hygiene concerns or stage of life.



Section 1: Customer expectations

What role do washrooms play in a customer's experience and are basic needs being met?

01 Customer expectations

"We must eat, drink, sleep, breathe and go to the toilet: those five things are not negotiable. Those are things we must do." These are the words of Raymond Martin, managing director of the British Toilet Association – a man who made it his life's work to ensure everyone has access to clean, safe and accessible loos. "Using the toilet is something we don't have control over, yet it's a vital bodily function."

And he's not wrong. At Essity, we share the belief that access to toilet facilities should be considered a certainty, not a luxury – and our results confirm just how necessary they are...

95% of UK adults told us they use the washroom facilities when visiting a venue – the most visited being restaurants (73%) and shopping centres (71%), followed by cafes/coffee shops (61%) and bars/pubs (61%).



But what do customers expect from the washrooms they use? As standard, 95% see toilet roll as a necessity, 93% expect regular cleaning and a further 93% expect working locks – reflecting a consensus that **hygiene, safety and cleanliness are critical factors in creating a positive washroom experience.**

Beyond the basics, meeting general accessibility needs is also highly expected among customers – specifically a presence of accessible toilets (86%), clear signage (80%) and good lighting (76%).

What do customers expect from the washrooms they use?

95%
Toilet paper

93%
Regular cleaning

93%
Locks that work properly

86%
Accessible toilets

80%
Clear signage

76%
Good lighting

So, you've re-stocked the toilet roll, glanced your eyes over the cleaning rota and tested the emergency alarm system in your accessible loo, but do these actions alone meet the standards your customers expect?

92% of the managers we surveyed believe so, claiming that their customers' needs are being met and a further 92% rating their washrooms as 'excellent' or 'good'. Almost all the managers we interviewed (99%) ensure their washrooms are cleaned at least once a day, and many keep them well stocked with the necessities – toilet paper being the item they are the least likely to run out of. These efforts have paid off for restaurants which, according to our respondents, are considered to have the best washrooms (40%), followed by hotel/bars (24%) and cinema/theatres (16%).

With it being almost a certainty for your customers to require the washroom facilities when visiting your venue, it's safe to say that you'll see a diverse group of people walking through your bathroom doors. So, are the basics enough?

"Toilets need to be functional, accessible and suitable for a wide range of users," says Martin, speaking on the importance of considering inclusive hygiene at hospitality venues. "A well-designed washroom provides relief, comfort, safety and dignity, helping ensure everyone can confidently use a venue and enjoy their visit."

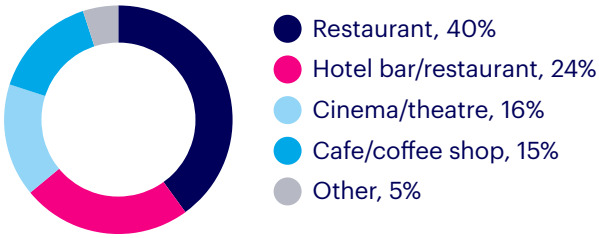


Managers believe customer needs are being met with **92% rating their washrooms as excellent or good** – with 99% of washrooms being cleaned at least once a day and toilet paper being the item they are the least likely to run out of.

And he's seen firsthand the impact that inclusive hygiene can have on customer loyalty. "People often underestimate the economic impact toilets have," he told us. "Toilets bring revenue, footfall and spending power. If people don't feel confident they'll be able to access a clean and suitable toilet, many simply won't visit a venue, town centre or high street in the first place."

Despite its importance, only 5% of our respondents believe that the washrooms they visit always meet the needs of all customers. In the next section, we uncover the impact this outlook might have on customer loyalty and the potential cost to your revenue if inclusive hygiene is overlooked.

Venue types with the best overall washroom conditions





Section 2: The value to your business

How does inclusive hygiene impact customer behaviour and what might this mean for your revenue?

02 The value to your business

It's not easy to appreciate how many people have conditions or sensitivities that may affect their washroom use. While some health needs may be visible, others are not, making it difficult to grasp the true demand for inclusive hygiene.

Recent studies show that 20% of the UK population have incontinence issues[1], 15% are neurodivergent[2] and 11% have mobility impairments[3]. Also consider those who require baby changing facilities – alongside other needs – and the importance of improving inclusive hygiene for your customers becomes clear.

"Washrooms need to be considerate of all needs and people at all stages of life, who contribute billions to the economy", says Martin, speaking on the potential impact on revenue if the standards expected of customers are not met. "These individuals won't go somewhere or spend money if they don't feel they'll have access to relief, comfort and dignity when they need it. The same applies to families with young children, who often need regular access to toilets throughout the day."

And customers are not afraid to take matters into their own hands...

68% of those we surveyed told us they've not used a restroom specifically because it didn't meet their personal needs – this includes poor cleanliness (79%), lack of toilet paper, soap or hand drying facilities (56%) or privacy concerns (26%). And over half (56%) told us that a washroom they weren't comfortable using would make them spend less, leave sooner or avoid returning – with a similar proportion (48%) willing to leave a negative review if they felt uncomfortable.

A significant majority of venue owners and managers (93%) are aware that a customer's opinion of a washroom can impact their overall perception of a venue – the repercussions they've experienced include complaints to staff (36%), leaving negative reviews (25%) and not returning (22%).

[1] NHS England

[2] City & Guilds 2025 Neurodiversity Index

[3] House of Commons Library



Impact of poor washroom facilities on customer behaviour

36%
Complain to staff

25%
Leave a negative review

22%
Won't return

16%
Spend less money overall

16%
Leave earlier than planned

15%
Tell others not to visit

essity



of customers **would be likely** to spend less money if they weren't comfortable using a venue's washroom.

Average uplift in food and drink spend for venues with excellent washrooms

% increase on usual spend

Hotel bar / restaurant	24.24%
Gym leisure centre	22.68%
Shopping centre	22.63%
Restaurant	22.02%
Stadium / sports venue	22.86%
Airport	21.39%
Cinema / theatre	21.17%
Pub / bar	21.08%
Museum / gallery / visitor attraction	21.07%
Fast food venue	20.33%
Cafe / coffee shop	19.98%
Train station	18.17%

On the flip side, experiencing a venue with a washroom that removes barriers and better meets a range of needs can lead to positive response from customers, including returning to the venue (85%), recommending the venue to others (78%), choosing it over another similar venue (78%) and bringing children or guests who have mobility aids (75%).

But how does this translate into potential revenue growth for your business?

We found that as much as 60% of respondents would be likely to spend more at a venue that ensured inclusive hygiene in its washrooms. Toilets which exceed expectations, would lead visitors to part with as much as £4.50 more than usual in a single visit.

Considering this average increase in spending per happy customer, Britain's restaurant owners could potentially see a staggering £98,050,787 more revenue – £63,529,431 for hotels and £61,831,365 for pubs. When all venue types – including cinemas, gyms and museums – are included, the total potential additional revenue amounts to £491,828,224 for the UK hospitality industry.

Yet if customer needs are not prioritised they are likely to go somewhere that does. With 65% of potential customers taking their money elsewhere if they encountered a washroom they were not comfortable using.

You've been given the facts but what's next? What does inclusive hygiene really mean in a practical sense and how can it be actioned in your business to unlock revenue growth?

UK hospitality revenue potential

£98,050,787
Restaurants

£63,529,431
Hotels

£61,831,365
Pubs

£491,828,224
All venue types total potential

essity

Section 3: Inclusive hygiene in practice

What does inclusive hygiene look like to your customers and how can it be actioned?

03 Inclusive hygiene in practice

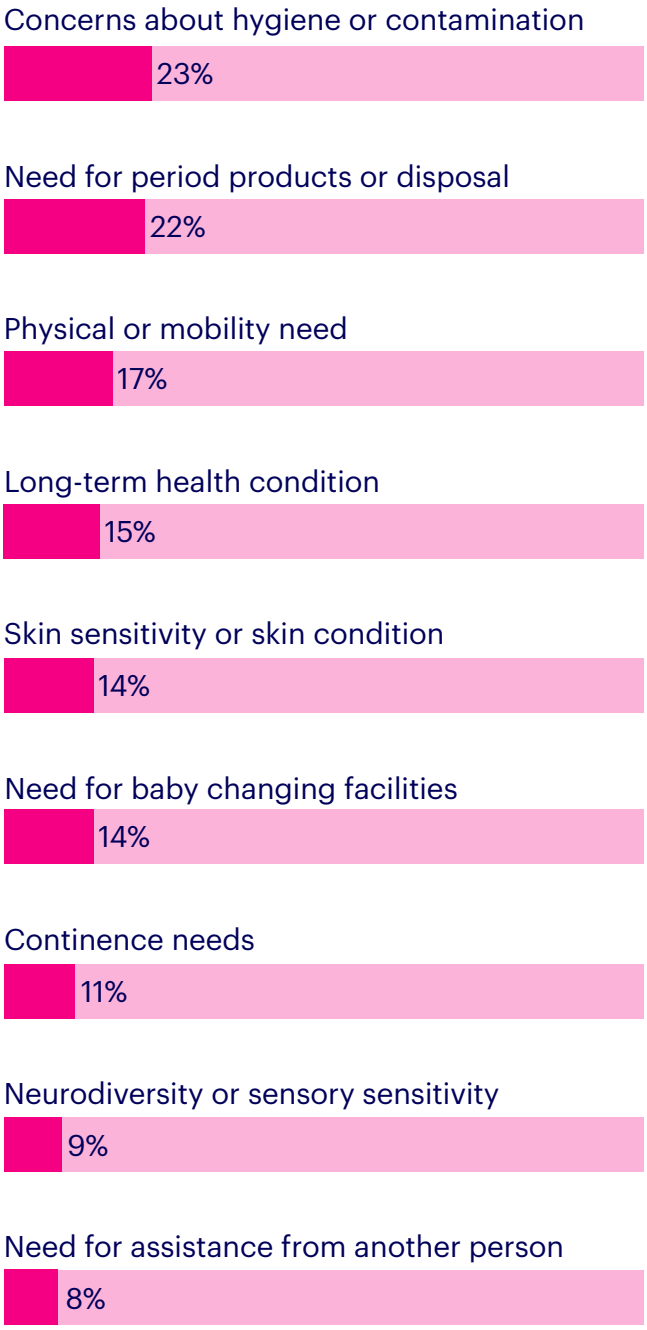
As hospitality business owners and managers, we know you work hard to offer the best services possible to your customers – whether that's food, drink, accommodation or entertainment. It's a no-brainer: give your customers a great experience and they'll keep coming back.

But we also know that washroom facilities play a significant role in building customer loyalty too. 92% of those we surveyed told us that the condition of a venue's washroom reflects how much it cares about its customers – and with these customers having a wide variety of needs, turning your attention to inclusive hygiene can have a huge impact on customer retention.

Neurodivergence or sensory sensitivities are just some of the many needs that should be considered when designing a washroom. Providing physical accessibility, comprehensive waste management and changing facilities for parents and people with medical conditions, as well as ensuring washrooms are private and clean, all play a role.



Reported needs that may affect washroom use



Our research confirms this. When asked if they – or someone they regularly visit venues with – had any needs that may affect washroom use, concerns about hygiene or contamination (23%), a need for period products or disposal (22%*), physical or mobility needs (17%) and more were cited.

In a practical sense, the most important factors that customers believe to be essential to inclusive hygiene include toilet paper availability (93%), cleanliness and hygiene (92%) and privacy (92%). For others, clear signage (70%), continence bins (55%) and touch-free fixtures (36%) are also considered to be essential.

We understand that inclusive hygiene might feel like a lot to consider, but our research has revealed just how much it matters to your customers. Despite this, it's a mixed bag when it comes to awareness surrounding the concept among venue managers and business owners. While over half (56%) of managers were very familiar with the term 'inclusive hygiene', the remaining 44% had either heard of it but did not know its meaning or hadn't heard the term at all – reflecting the need for greater commitment and awareness.

While 77% of managers claim that inclusive hygiene is either 'a high' or 'the highest' priority to them, they are most confident in meeting the needs of those with limited mobility (83%), people with concerns about hygiene or contamination (83%), wheelchair users (82%), parents and carers with babies (82%), and those who menstruate (82%).

Yet many venue owners and managers face barriers when taking further steps towards inclusive hygiene – the biggest being cost (35%), building layout (23%), lack of space (22%), lack of staff time (19%).

*This statistic was highest among women and younger respondents. As the UK population skews older (40% of adults are aged 55+) this impacts the overall average.

56% of managers were very familiar with the term **'inclusive hygiene'**, the remaining 44% had either heard of it but did not know its meaning or hadn't heard the term at all.

Unmet washroom needs among those who avoided using venue facilities



But we're here to help

At Essity, we're committed to breaking barriers to well-being and can support you in delivering a more welcoming, comfortable and functional washrooms for your customers.

Conclusion

Removing barriers

"Washrooms truly are a hidden growth driver for businesses. The first step in building a more loyal customer base – and potentially unlocking untapped revenue – is recognising just how important inclusive hygiene is to your customers," says James Cartwright from Essity.

"Our research has exposed the significant role your venue's washrooms can play in a customer's overall experience. Yet it has also revealed just how far there is to go – both in terms of awareness and action among managers and business owners – before all customers feel comfortable in public washroom spaces.

"Our goal at Essity is to simplify inclusive hygiene for you – to make attending to the diverse set of needs of your customers easier to achieve.

"Improving inclusive hygiene sends the message that you care about your customers beyond their experience of your core services. It's your way of saying, 'We see you – all of you. And your health and well-being matter to us.'"



James Cartwright
Commercial Director, Professional Hygiene UK and ROI

J. Cartwright



Methodology

This research is based on two independently conducted surveys carried out by OnePoll. The first one took place between August 13th and 28th 2026. The total sample size was 5,010 adults living in the UK. The data was matched to nationally representative figures for age and gender.

The second survey was conducted between August 13th and 27th 2026. The total sample size was 1,000 managers of venues which serve food/drink and have washrooms.

Essity is a leading global hygiene and health company dedicated to improving well-being through products and services. Sales are conducted in approximately 150 countries under the leading global brands TENA and Tork, and other strong brands, such as JOBST, Leukoplast, Libero, Libresse, Lotus, Nosotras, Saba, Tempo, Vinda and Zewa. Essity is listed on Nasdaq Stockholm.

For more information visit **www.torkglobal.com**

essity