

State of the Market Survey 2018

Local Authority Cleaning Services



The state of the market survey was conducted by Vickie Hacking, APSE Principal Advisor.

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Local Authority Building Cleaning Services

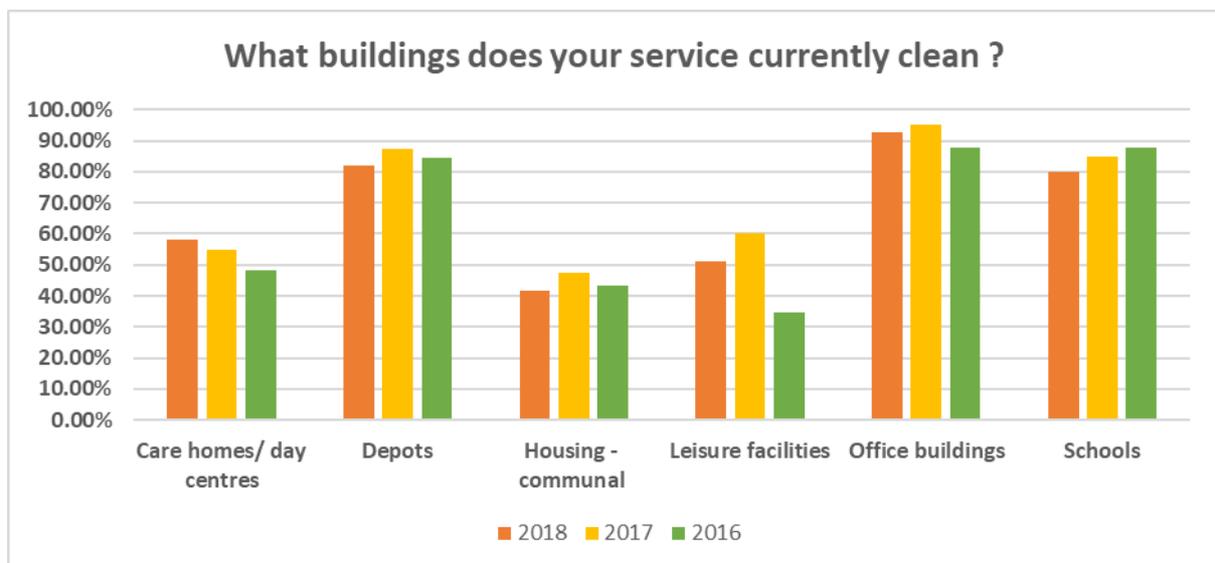
State of the Market 2018

APSE conducted an online survey and there was a total of 55 responses received from the following regions of the UK: -

- England – 50%
- Scotland - 32.1%,
- Wales - 14.3%
- Northern Ireland – 3.8%

Results

The survey sought to establish what the mix of buildings the service currently cleaned. The graph below provides an overview of the responses for 2018 and a comparison with the responses received in the past two surveys.



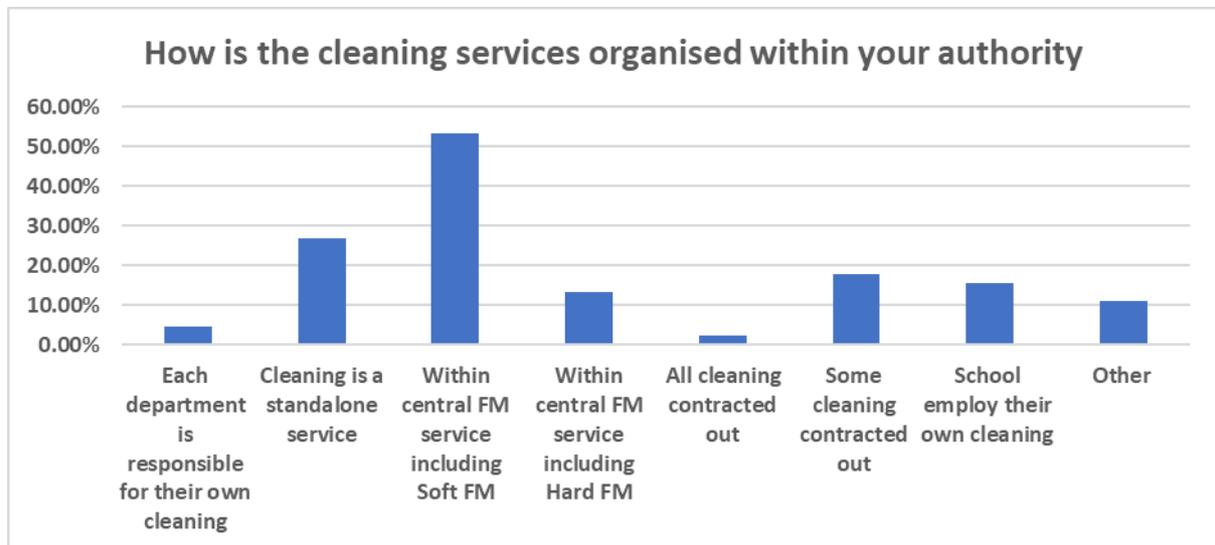
The highest proportion of respondents (92.7%) report that they clean office buildings which is a slight decrease from 95.0% in 2017 and 94.8% in 2016. There are 81.8% of respondents advising that they clean depots which compares with 87.5% in 2017 and 84.5% in 2016. The number of respondents reporting that the service cleaned schools has seen a downward trend since 2016, with a decrease of 9.88%.

In addition to the buildings cleaned referred to in the graph, for the 2018 survey the respondents were also provided with further answer choices to reflect the comments from previous surveys, these buildings and the percentage of respondents are as follows: -

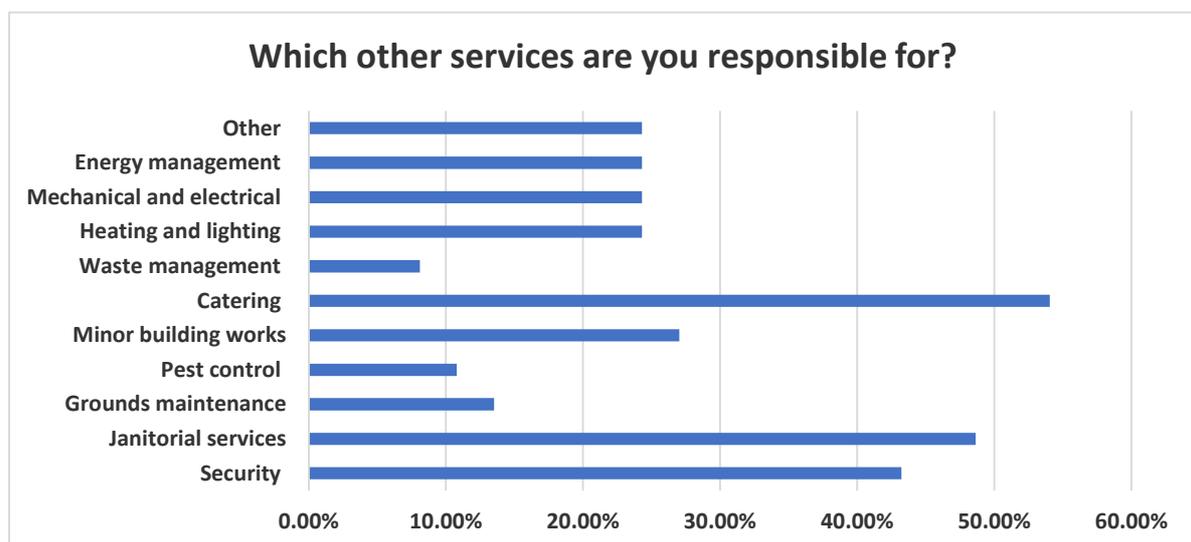
- Entertainment Facilities – 41.8%
- Higher Education establishments – 18.2%
- Markets – 20.0%

Structure

It was reported by 53.3% of those responding to the State of the Market survey that the cleaning service sits within a central FM service including Soft FM, with 26.7% advising that it is run as a standalone service. There are 17.8% who stated that some of the cleaning is contracted out and 15.6% are reporting that schools employ their own cleaning staff.



Respondents to the survey reported that in addition to building cleaning they are responsible for a range of other services. These are detailed in the graph below: -



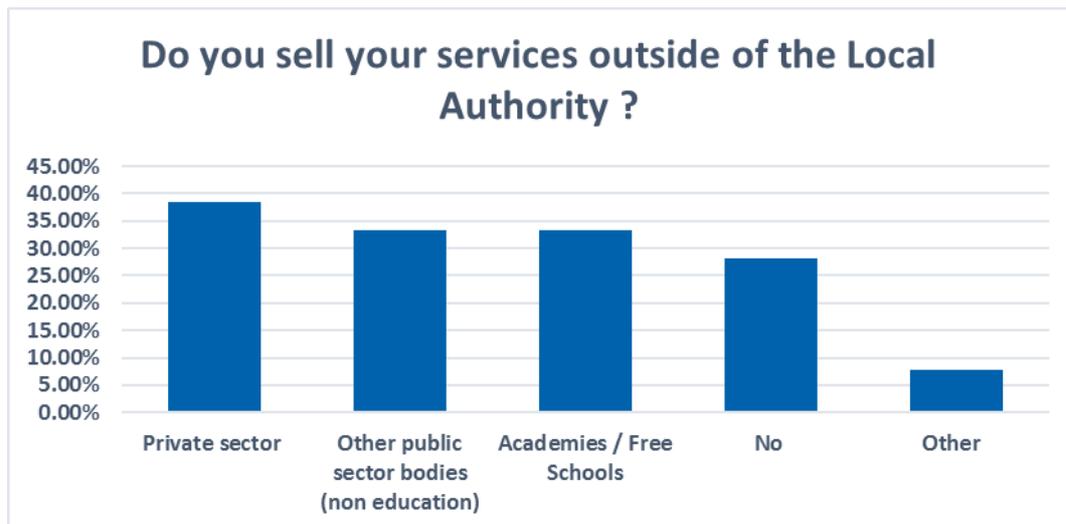
There are a range of other services that respondents reported offering and these include: -

- Cleaning within social work care homes/respite centres.
- Meals on wheels.
- Public toilets.

- Housing support.
- School crossing patrols.
- Bereavement services.
- Street cleansing.
- Public space CCTV.
- Building services.

Selling services outside the local authority

With the increasing requirement to generate an income from the service, the State of the Market survey sought to understand if councils were selling services outside the Local Authority. The graph below details the responses received.

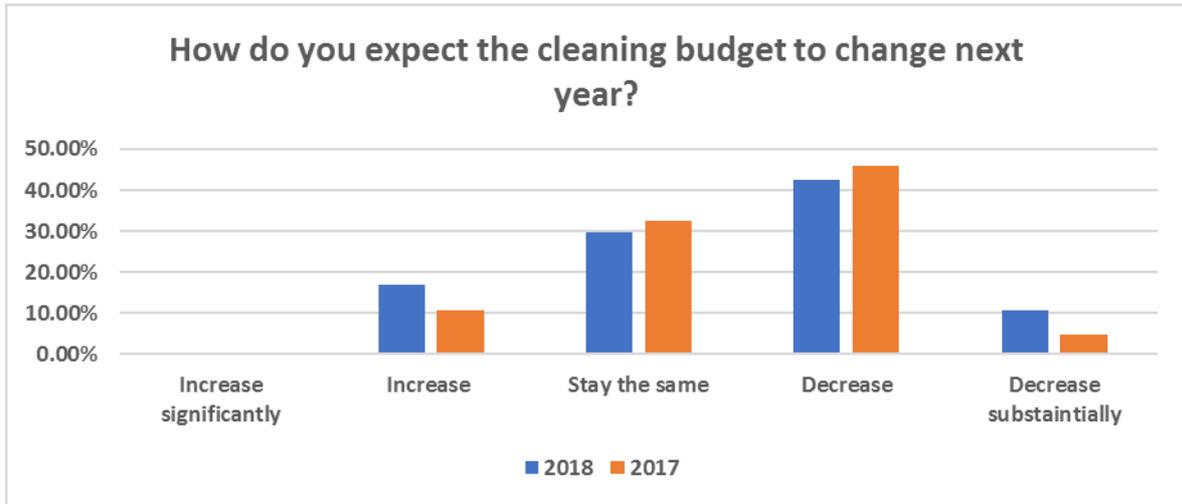


The highest percentage of responding authorities report that they sell services to the Private Sector (38.6%), which is a decrease from the 58.1% reporting that this was the case in 2017. It was stated by 33.3% of respondents that they provided services for other public sector bodies (non-education) and Academies/free schools. There were a further 7.7% specifying that they sold services to other organisations. In addition, it was reported by 28.2% of respondents that services were not sold outside of the local authority.

APSE has a national [local authorities commercialisation income and trading network](#) and Scottish and Southern commercialisation advisory groups for local authorities looking to share best practice and network with other trading authorities.

Expectations for budgets

The graph below provides an overview of the expectation for budgets over the next 12 months and allows a comparison to be made with the responses from the last survey.

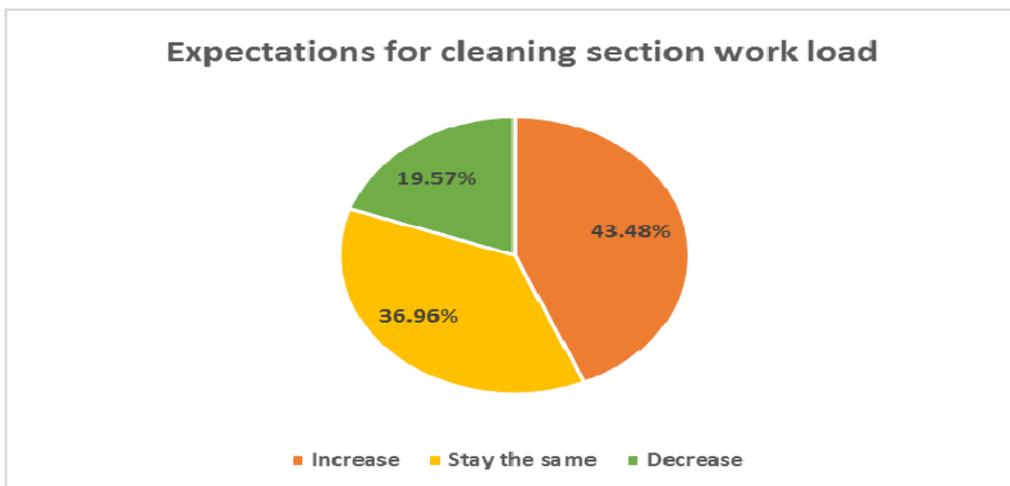


The majority of respondents this year (42.6%) anticipate that the budget will decrease over the year which is a decrease of 7.3% from the 2017 survey, the percentage of respondents expecting budgets to decrease significantly has remained consistent since 2017 with 10.6% stating this expectation in 2018 compared with 10.8% in 2018.

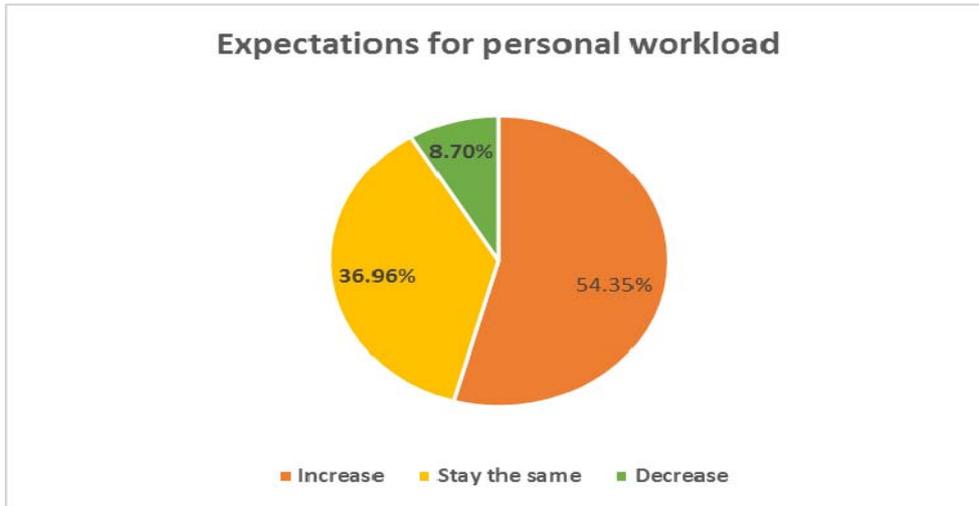
There has been an increase in the number of respondents believing that budgets will increase from 10.8% to 17.0%. This year the survey also shows a slight decrease in the number of respondents expecting that the budget will be the same from 32.4% in the last survey to 29.8% in 2018.

Workload

The State of the Market survey asked how workload was expected to change over the next 12 months both for the cleaning section and personally. The charts below provides a summary of these expectations: -



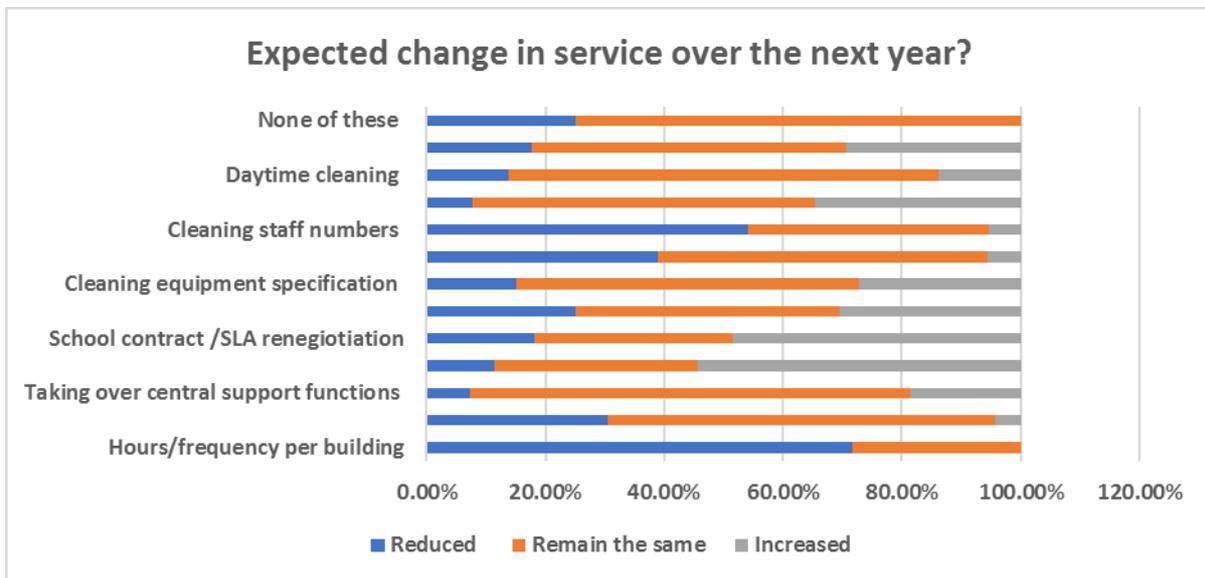
The majority of respondents (43.5%) believe that there will be an increase in the cleaning section workload, 37.0% expect that it will remain the same and the remaining 19.6% state that they believe it will decrease.



A greater proportion of respondents, when making a comparison with the cleaning section, (54.4%) state that they expected their personal workload to increase, 37.0% advised that it would stay the same and the remaining 8.7% expected a decrease in workload.

Due to the increased focus on value for money and productivity, 71.8% of respondents are expecting a reduction in the hours/frequency per building over the next year, 54.0% are forecasting a reduction in cleaning staff number, 38.9% are expecting a reduction in management numbers and 30.4% forecast a reduction in agency labour.

The chart below provides an overview of the detailed breakdown of respondents' expectations of how the service will change over the next 12 months.



Cleaning methodology

Robotic cleaning holds significant promise for unobstructed areas but has yet to gain a significant foothold with only 2.6% of respondents using these methods in school buildings. The figures show that manual methods of cleaning are still prominent although the majority of respondents use mechanical cleaning in a range of buildings, 79.0% in school buildings; 68.6% in administration

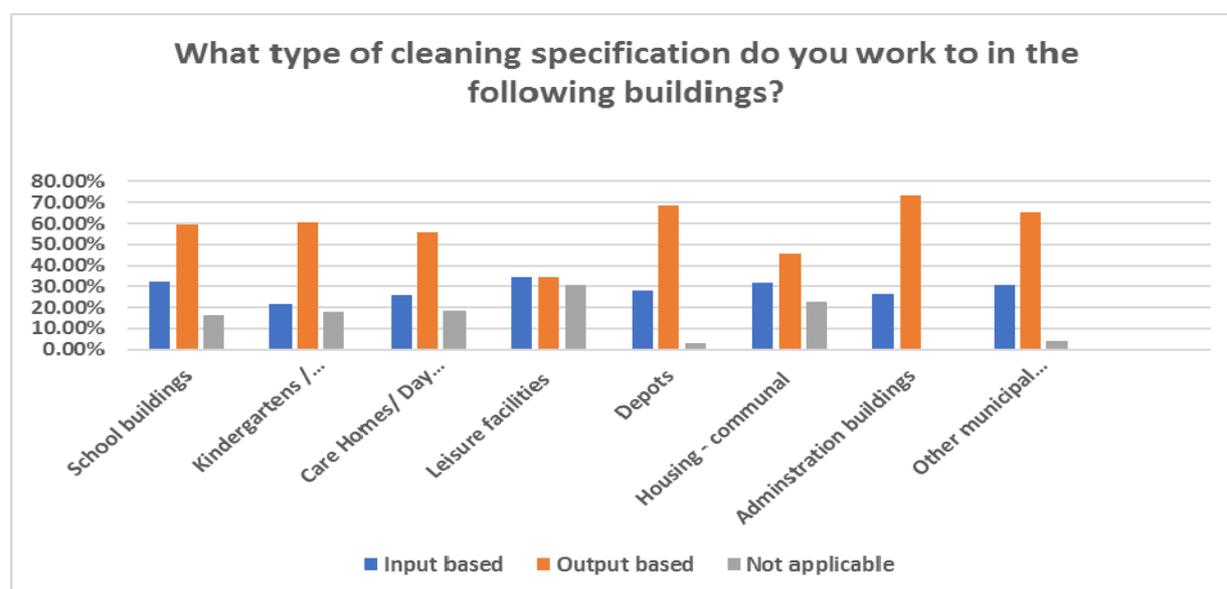
buildings; 64.7% depots; 75.0% kindergartens / preschool buildings, 52.0% care homes and day centres.

The table below provides an overview of the range of responses received: -

	Manual (Traditional)	Laundered microfiber systems	Mechanical (e.g. scrubber dryers)	Robotic	Not applicable
School buildings	81.58%	26.32%	78.95%	2.63%	15.79%
Kindergartens /preschool buildings	78.57%	28.57%	75.00%	0.00%	17.86%
Care Homes/ Day Centres	80.00%	20.00%	52.00%	4.00%	20.00%
Leisure Facilities	59.26%	14.81%	62.96%	0.00%	33.33%
Depots	91.18%	26.47%	64.71%	0.00%	2.94%
Housing - communal	69.23%	15.38%	34.62%	0.00%	26.92%
Administration buildings	97.14%	25.71%	68.57%	0.00%	2.00%
Other municipal buildings	89.29%	25.00%	67.86%	0.00%	7.14%

Cleaning specification

The graph below sets out the types of specification used for each type of building. The majority of respondents are reporting that the cleaning specifications are output based.



Staffing and standards

There are 76.9% of respondents reporting that there is regular staff training, 69.2% hold regular staff appraisals, 30.7% circulate a regular cleaning section newsletter and there are 23.1% of respondent reporting that the organisation holds the Investors in people accreditation.

In addition, there are 41.0% of respondents stating that the BICs standard is used throughout the service, 59.0% have an internally agreed standard, and 7.7% report that there is an alternative quality system in place.

For the first time the State of the Market survey asked if the local authority ran an apprenticeship programme in the cleaning service and what percent of the workforce is made up of apprentices. Since the introduction of the apprenticeship levy the question has been included to gain an understanding of apprentices within the sector with a view of comparing trends in future years.

The vast majority of respondents (84.6%) advised that there was not a programme in place, with the remaining 15.4% advising that the service did have a programme in place. Of these, 88.46% report that apprentices make up 0-5% of the workforce and 7.7% state that 5-10% of the workforce in the building cleaning service are made up of apprentices.

Wage costs

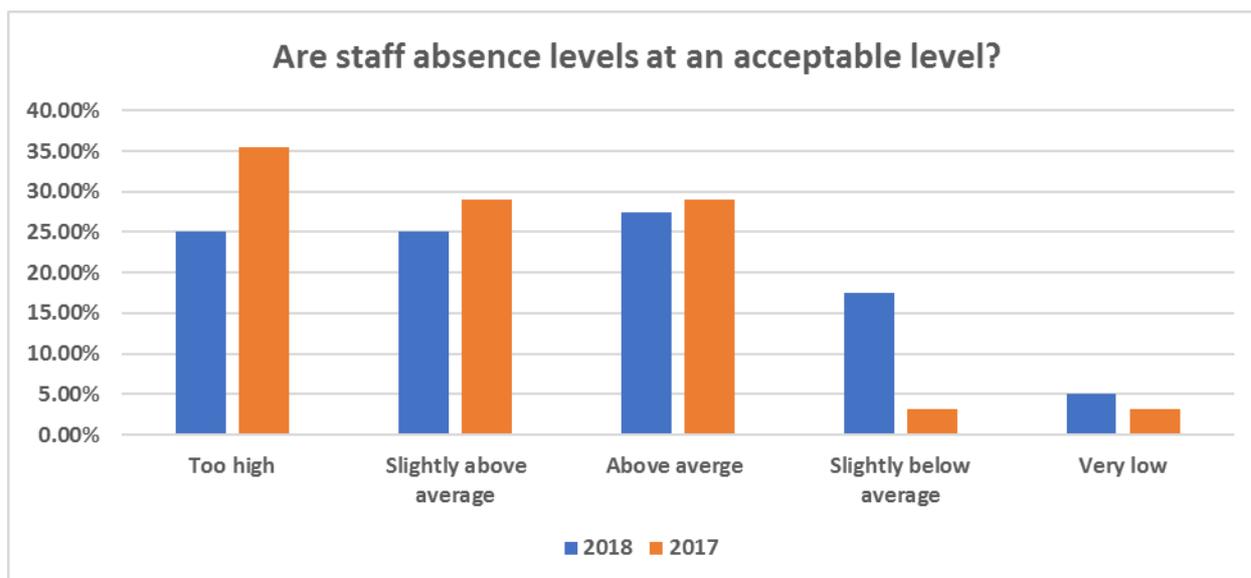
The vast majority of respondents (92.5%) are reporting that the higher living wage is paid in their organisation, with a further 2.50% advising that it is being introduced imminently. This represents an increase of 31.0% from the figure quoted in the 2017 survey.



The average hourly wage for a cleaning assistant was calculated as £8.73 and increase of 4.6% from 2017 with pay rates ranging from the lowest rate of £6.94 and the highest rate of £11.05.

Attitudes to absence

The State of the Market survey sought to gain an understanding of the respondents' attitudes to absence. These attitudes are detailed in the graph below: -



There are fewer respondents than last year (77.5%) reporting that the staff absence level within the service is too high; slightly above or above average. In addition, although a small variance there are more respondents reporting that the absence is very low.

The figures from the survey highlight that although attitudes have improved, staff absence levels still represent an area of concern in the building cleaning service.

Comments on the future

Although a small minority of respondents expected that there would be no growth in the cleaning service over the next year. The majority of respondents saw growth for the service in the following areas: -

- Extending the range of services - 42.4%
- New public sector clients – 27.3%
- New private sector clients – 24.2%
- Expanding existing contacts – 18.2%

Future decreases for the service over the next 12 months included:

- Reduction in cleaning specification/frequency – 73.7%
- Rationalisation of councils' estate – 52.6%
- Loss of school contracts – 29.0%
- Loss of academies – 23.7%

The Association for Public Service Excellence

APSE member authorities have access to a wide range of membership resources to assist in delivering council services. This includes our regular advisory groups, specifically designed to bring together elected members, directors, managers and heads of service, together with trade union representatives to discuss service specific issues, innovation and new ways of delivering continuous improvement. The advisory groups are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

Advisory groups are a free service included as part of your authority's membership of APSE and all end with an informal lunch to facilitate networking with peers in other councils. If you do not currently receive details about APSE advisory group meetings and would like to be added to our list of contacts for your service area please email enquiries@apse.org.uk.

Our national advisory groups include: -

- Building Cleaning
- Catering
- Cemeteries and Crematoria
- Environmental Health Advisory Group
- Housing, Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Renewables and Climate Change
- Roads, Highways and Street Lighting
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing

The APSE Facilities, Catering and Building Cleaning Seminar scheduled on the 24 and 25 January 2019 at the Nottingham Belfry Hotel will provide an excellent opportunity to share knowledge and discuss challenges of issues such as reducing sickness in frontline staff and insourcing facilities management with sector experts and colleagues.

Details of the Seminar and how to book can be accessed via the following link: -

- [APSE Facilities, Catering and Building Cleaning Seminar](#)

If you require any further information on the findings of this State of the Market survey 2017 please contact Vickie Hacking at vhacking@apse.org.uk or by phone at 0161 772 1810.