apse membership resources

State of the Market Survey 2022

Local Authority Cleaning Services

Briefing 22 - 20
May 2022

The State of the Market survey was conducted by Vickie Hacking, APSE Principal Advisor.

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Local Authority Building Cleaning Services

APSE conducted an online survey in December 2021 and January 2022, which was sent out to local authority building cleaning contacts throughout the UK and 40 responses were received from APSE member councils providing a good representative sample.

A series of questions were asked covering attitudes to the issues currently facing building cleaning, the operation of the cleaning service and challenges for the future. The majority of the questions have been surveyed since 2008 and trends are now apparent.

The data collected through these surveys is intended to provide a snapshot of the perception of local authority cleaning services. For detailed and verifiable comparison of both financial and performance data, authorities should consider joining APSE performance networks that covers building cleaning.

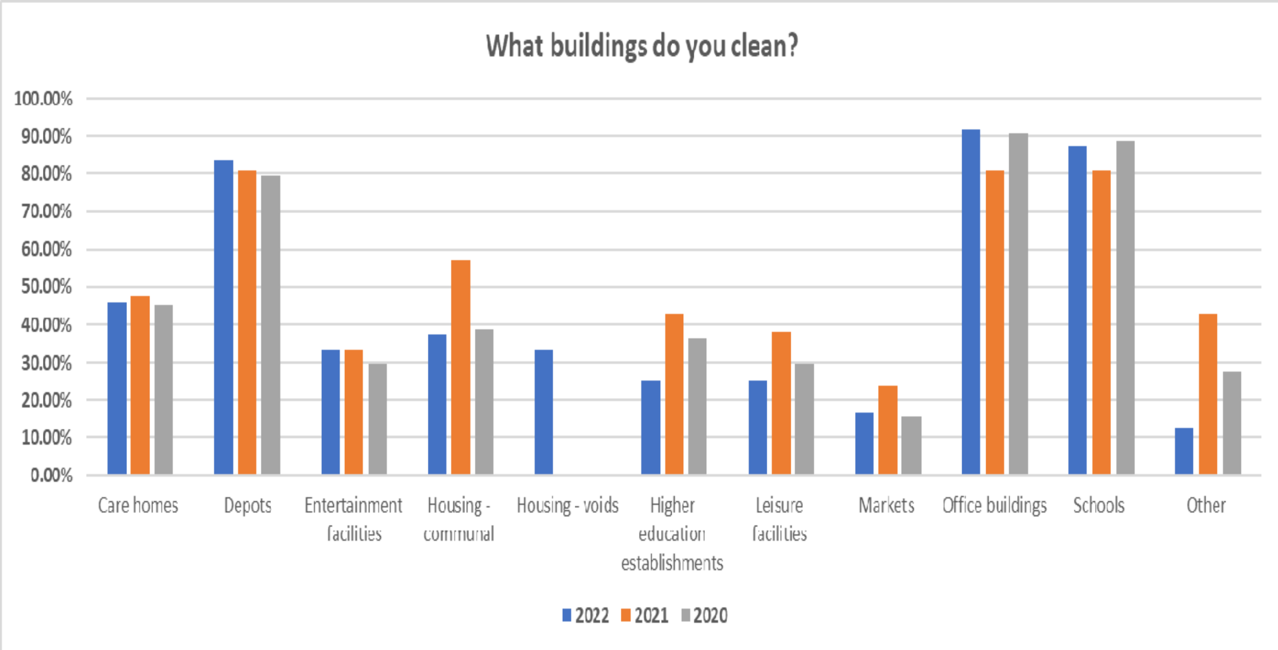
1. Results

Respondents were UK wide with 40.00% from England, 45.00% from Scotland, 2.50% from Northern Ireland and 12.50% from Wales. The survey, therefore reflects APSE's UK-wide membership and provides a national reflection of opinion. It should also be noted, that due to the Covid-19 health pandemic, it is sensible to read across some of the 2022 results to 2020, rather than 2021, to provide a better comparator on emerging trends due to the impact of the pandemic on building cleaning services.

2. Scope

What buildings does your service currently clean?

The survey sought to establish what mix of buildings the service currently cleaned. The graph below provides an overview of the responses for 2022 and provides a comparison with the responses received to the 2021 and 2020 State of the Market surveys.



The highest proportion of respondents (91.67%) report that they clean office buildings, 87.50% advise that they clean schools and 83.33% state that the service clean depots. The percentage of respondents reporting that they clean office buildings and schools is comparable to that reported in 2020.

The greatest decrease from 2021 can be seen in the area of housing (communal areas) with a decrease of 19.64%. The reason for the increase in office and school cleaning can be attributed to the COVID-19 restrictions being lifted in these establishments being more widely used. Whereas, as fewer people are shielding, therefore there is a reduced need for cleaning in housing communal areas.

In addition to the buildings cleaned referred to in the graph, for the 2022 survey respondents also confirmed that the service cleaned the following: -

- Libraries
- Further education establishments
- Public toilets
- Crematorium
- Parish council buildings

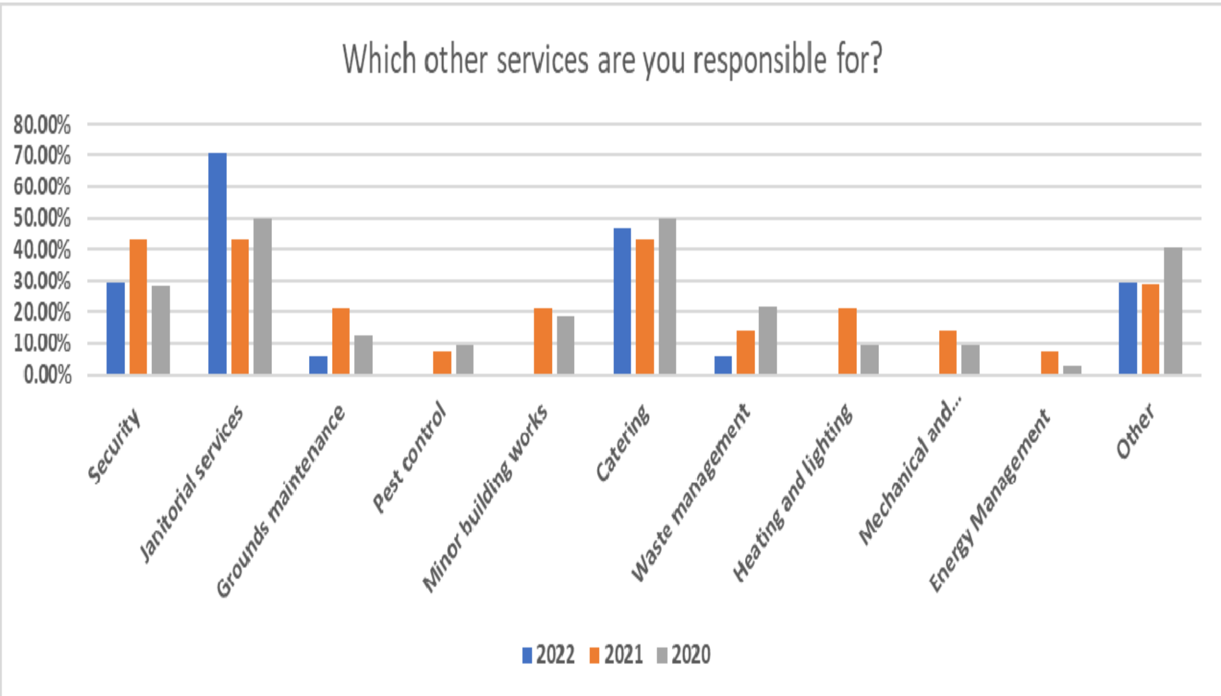
How are the cleaning services organised within your authority?

To gain an understanding of how the service is organised in the authority the respondents were asked to select from a range of options. The graph below provides an overview of the responses received.

The largest portion of respondents report that the cleaning service sits within a central FM service that includes Soft FM (58.33%), with a further 29.17% reporting that cleaning is a standalone service and none of the respondents advised that all of the cleaning service was contracted out.

Which other services are you responsible for?

Respondents to the survey reported that in addition to building cleaning they also had responsibility for a range of other services. The following graph provides details of these services and makes a comparison between the responses received in 2021 and 2020 State of the Market surveys.



There is a correlation amongst respondents between the other areas that the building cleaning service is responsible for, with 42.86% of respondents reportng that they are also responsible for janitorial, security and catering services.

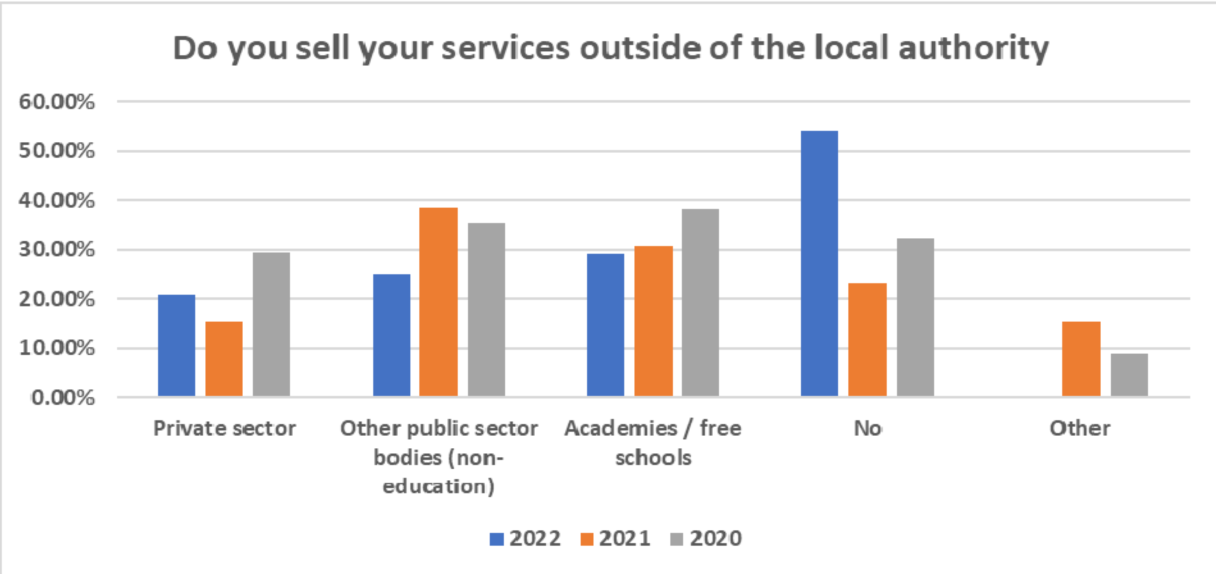
In addition to the list of services provided in the above graph, there were also a range of other services that respondents reported offering and these include: -

- Cleaning at events
- PAT testing
- Window cleaning
- School crossing patrols
- Cleaning to support independent living

The survey highlights that the role of 'building cleaning manager' is wide and varied and that the remit encompasses a range of other facilities management responsibilities.

Do you sell your services outside of 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 for 2022, (54.17%) report that they do not sell services to the other public sector bodies. This represents a 31.09% increase when compared with the responses in 2021, and could be due to the capacity of the service to fulfil existing contractual obligations with the additional cleaning specifications required during the pandemic, together with a slowing down of commercial activity to concentrate on core activities, as well as the closure of some clients facilities during lockdown.

How do you expect the cleaning budget to change next year?

The majority of respondents to the 2022 survey (45.84%), expect that the budget will increase or significantly increase in the next year, which represents a 15.28% decrease when compared with the responses received in 2021.

45.83% of respondents believed that the budget would stay the same which compares with 22.22% of respondents believing this in 2021.

A small minority, 8.33% advised that they thought the budget would decrease or decrease significantly, which compares to 16.67% in 2021. The change in perception can be linked to the increased demand and the recognition of the importance of the cleaning service as a result of COVID-19.

What aspect of the cleaning service has seen the greatest price rises?

To gain an understanding of the pressures on the cleaning service, the 2022 State of the Market survey asked where the greatest price rises had been seen, the graph below provides an overview of the responses received.

The vast majority of respondents, 73.91% reported that staffing costs has seen the greatest price rise and 39.13% advised that cleaning products had also seen price rises.

What has the service done to mitigate price rises.

In response to the price rises, half of the respondents advised that the service had sourced alternative products / equipment, while 15% respectively reported they had changed suppliers or changed cleaning specifications. In the comments to this question, it was stated that due to the highest rising cost being staffing it was difficult to absorb the increase and not pass the cost onto the customer.

Has the service passed on the price rise to the customers?

The largest percentage of respondents, 34.78% reported that the service had not passed on the cost to the customer, 26.09% state that they have done, whilst 21.74% advise that the price rise had been passed on in part to the customer.

3. Staffing and workload

How do you expect workload to change over the next 12 months?

To survey asked how respondents anticipated the workload for the service and personally would change over the next twelve months. The graph below provides an overview of the responses received:

The majority of respondents (57.89%) anticipated that the workload of the cleaning section would increase, which is 18.87% higher than what the respondents believed in 2020. Likewise, the vast number of respondents, 72.22% thought that their personal workload would increase, compared with 69.23% of respondents reporting this in 2020.

It is also noted that in 2022 that none of the respondents felt that the workload would decrease either within the cleaning section or personally and this was also the case in 2021. Again, this could be a direct response to the demand placed on the service from the pandemic.

Which of the following applies to your staff training?

The majority of expenditure for the cleaning service is attributed to the workforce. Therefore, the survey sought to understand what staff training local authorities were providing for the cleaning service. 50.00% of respondents reported that they held regular appraisals, 72.22% provided regular staff training, 44.44% circulate a regular cleaning section newsletter and 22.22% of respondents reported that the organisation holds the Investors in People accreditation.

In the comments associated with this question, it is clear that staff training has continued through the pandemic. However, this has changed from face-to-face training to online training.

How do you expect your staffing levels to change over the next year?

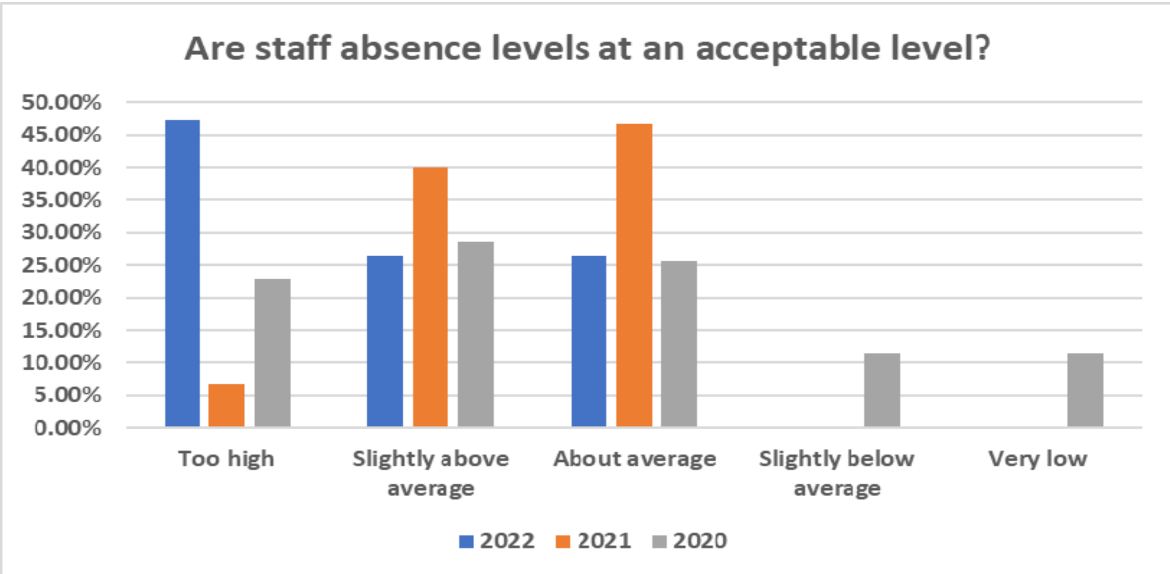
The survey asked what the expectation was for staffing levels over the next year. When comparing with the responses from 2021, 33.54% of respondents predicted that staffing levels would increase or significantly increase in the next 12 months, which is a decrease from 62.50% of respondents expecting this to be the case in 2021. This could be in part due to the issues being experienced in staff recruitment and retention

There were 50% of the 2022 respondents believing that staffing levels would remain the same.

There is a direct correlation between the expectations for staffing levels and the workload of the service over the next 12 months. It is anticipated that an increase in workload, will result in an increase in the number of staff to allow demand to be met.

Attitudes to absence

The State of the Market survey sought to gain an understanding of the respondents' attitudes to absence. Below is a comparison with the responses received in the 2022, 2021 and the 2020 State of the Market Surveys



For 2022, the perception regarding staff absence has seen a change from the perception in 2021, with just under half of the respondents (47.37%) believed that absence levels were too high. This could be in part be due to the ongoing COVID-19 pandemic and the previous requirements to isolate for a prescribed period.

In the past two years, none of the respondents have stated that staff absence is slightly below average or very low, this could again be a result of the pandemic.

All employers must now pay the National Living Wage - However: Do you pay the higher Living Wage Foundation Living Wage?

In response to this question, the vast majority of respondents 89.47% report that their service pays the higher Living Wage Foundation Living Wage, 10.53% advised the higher rate was not paid which is comparable with 2021, where 87.50% of respondents advised the higher rate was paid and 12.50% stated that they did not.

The lowest current basic hourly rate of pay for cleaning staff in the 2022 survey was reported as being £9.25 which is the same rate as 2021 and the highest amount was £9.91 which is also comparable with the £9.90 reported last year. The average rate amongst respondents was £9.48

It should be noted that respondents to the 2022 survey reported that there were pay awards pending and due to be introduced in April 2022.

Cleaning methodology, standards and sustainability

What type of cleaning specification do you work to in the following buildings?

The survey sought to gain an understanding of the methodology and the type of specification that the cleaning service applied in a specific building type.

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

Building type	Manual (traditional)	Laundered Microfibre systems	Mechanical e.g scrubber dryers	Robotic	Input specification	Output specification
School buildings	86.96%	26.09%	89.96%	0.00%	43.48%	56.52%
Nurseries / preschools	75.00%	30.00%	65.00%	0.00%	38.89%	50.00%
Care homes / day centres	64.71%	5.88%	41.18%	0.00%	41.18%	35.29%
Leisure facilities	53.85%	15.38%	53.85%	0.00%	38.46%	23.08%
Depots	95.24%	19.05%	61.90%	0.00%	45.00%	60.00%
Housing - communal	78.57%	21.43%	42.86%	0.00%	40.00%	46.67%
Administration buildings	86.96%	21.74%	65.22%	0.00%	43.48%	60.87%
Other municipal buildings	94.74%	21.05%	73.68%	0.00%	44.44%	72.22%

The responses received show that the predominant methodology remains manual cleaning for the majority of building types and that most cleaning services are working to an output-based specification.

None of the respondents have indicated that they use robotic technologies to clean buildings. This could be due to the current cost of these technologies and that robotics are not deemed to be essential to securing contracts.

Which of the following Cleaning Standards, and quality measures does your authority use?

To gain a picture of the cleaning standards that the service works to it was asked which of the specified standards the council used to measure quality. The majority of respondents 62.50%, advised they used an internally agreed standard, a further 41.67% reported that BICS standards were used with all their cleaning work and 12.50% have an alternative cleaning standard in place. For respondents that have specified other to this question they have commented that the service works to cleaning standards that are agreed with the customer.

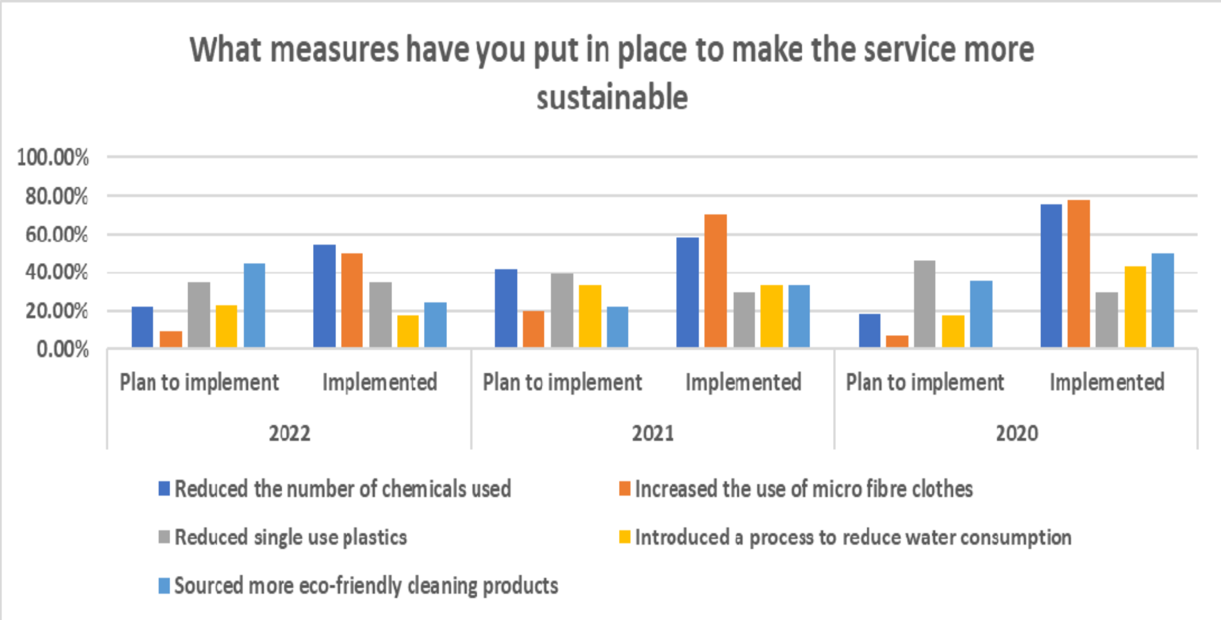
Building Cleaning Inspection App – APSE Performance Networks have developed a new app to support councils when carrying out building cleaning inspections and audits. Further information regarding the app can be obtained via the link below: -

Cleaning audit management system

Also, further information can be obtained by contacting APSE Performance Networks Team, directly on: - performance.networks@apse.org.uk

What measures have you put in place to make the service more sustainable?

With the increased focus on sustainability, the 2022, 2021 and the 2020 survey asked respondents to report on the measures that they have put in place or were considering implementing to make their service more sustainable. The graph below provides an outline of the responses received.

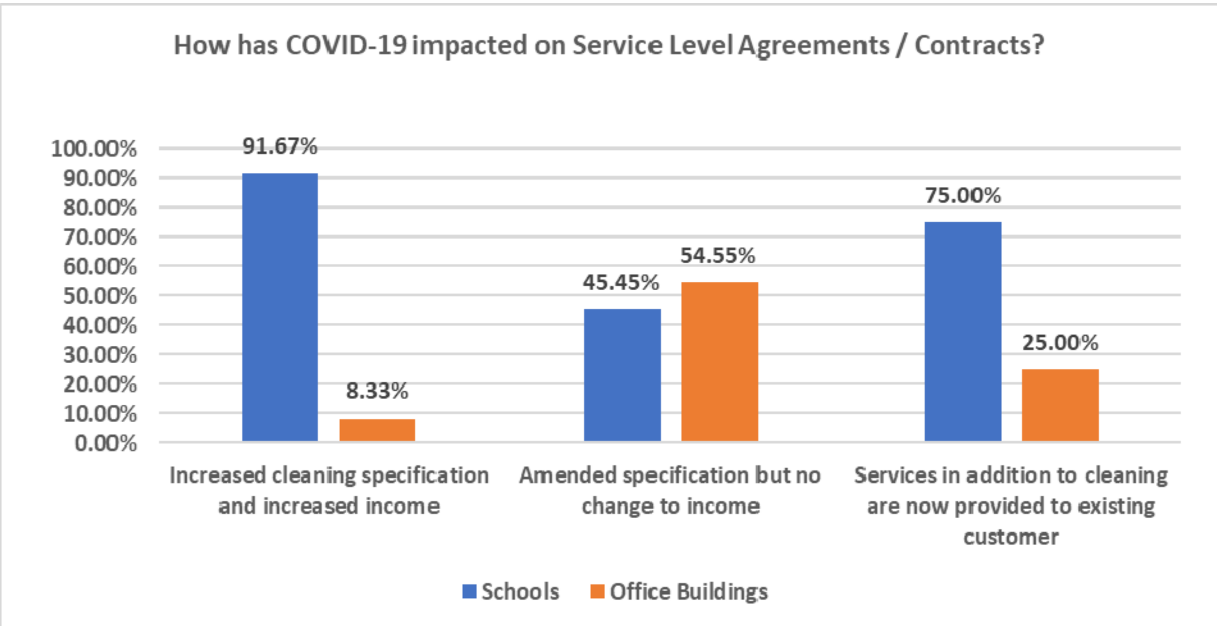


The responses show that local authorities are now implementing measures to make the service more sustainable. With over half of the respondents, (54.55%), to the 2022 survey reporting that they were reducing the number of chemicals the service used and 50.00% advised that the use of microfibre clothes had been increased.

4. COVID-19

How has COVID-19 impacted on Service Level Agreements (SLA)/ Contracts?

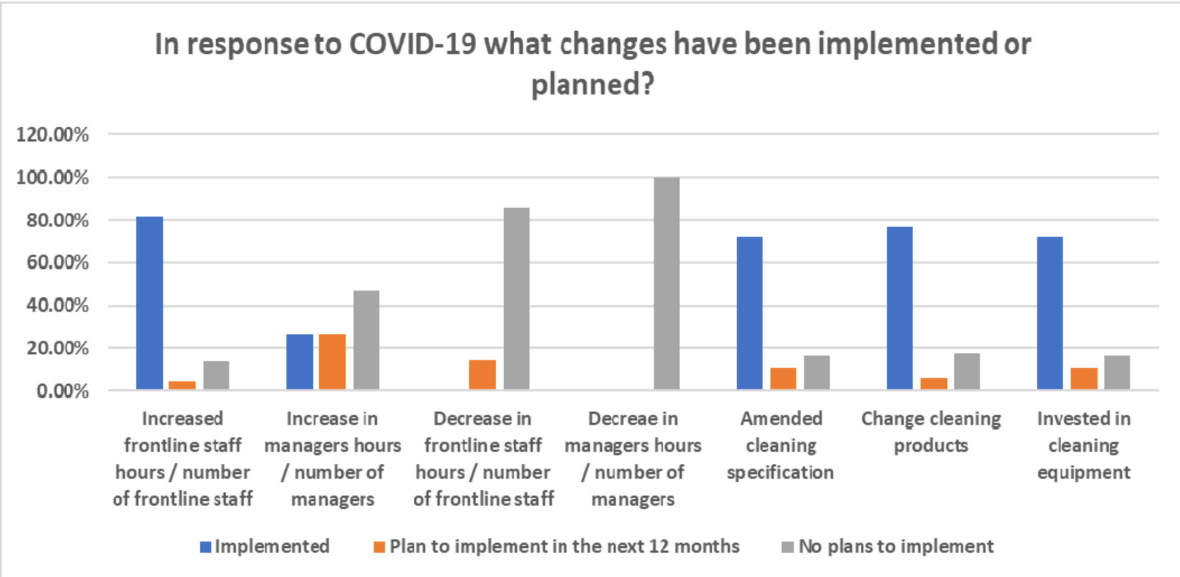
The graph below provides an overview of how COVID-19 has impacted on SLA's / contracts.



The vast majority of respondents 91.67%, report that they have increased cleaning specification and increased income from school contracts. Prior to the pandemic, the cleaning of schools and office buildings was primarily conducted outside working hours or when the building was closed and tenders had focused heavily on price. However, it is now reported by local authorities that the focus is on increased cleaning frequencies carried out during the working day.

In response to COVID-19 what changes have been implemented or planned?

To gain an understanding of how COVID-19 has impacted on local authority building cleaning services, the survey asked what changes had been and were planned to be implemented in response to the pandemic. The graph below highlights the responses received.



A vast number of respondents, 81.82% report that they have increased the number of frontline staff or frontline staff hours. 72.22% of respondents advised that amended cleaning specification has been implemented.

These changes could be explained by cleaning being an important part of mitigating the spread of COVID-19 in schools and workplaces, customers requesting the cleaning staff to be more visible to provide reassurance to the users of the building and also the requirement to undertake additional cleaning, such as regular touchpoint cleaning.

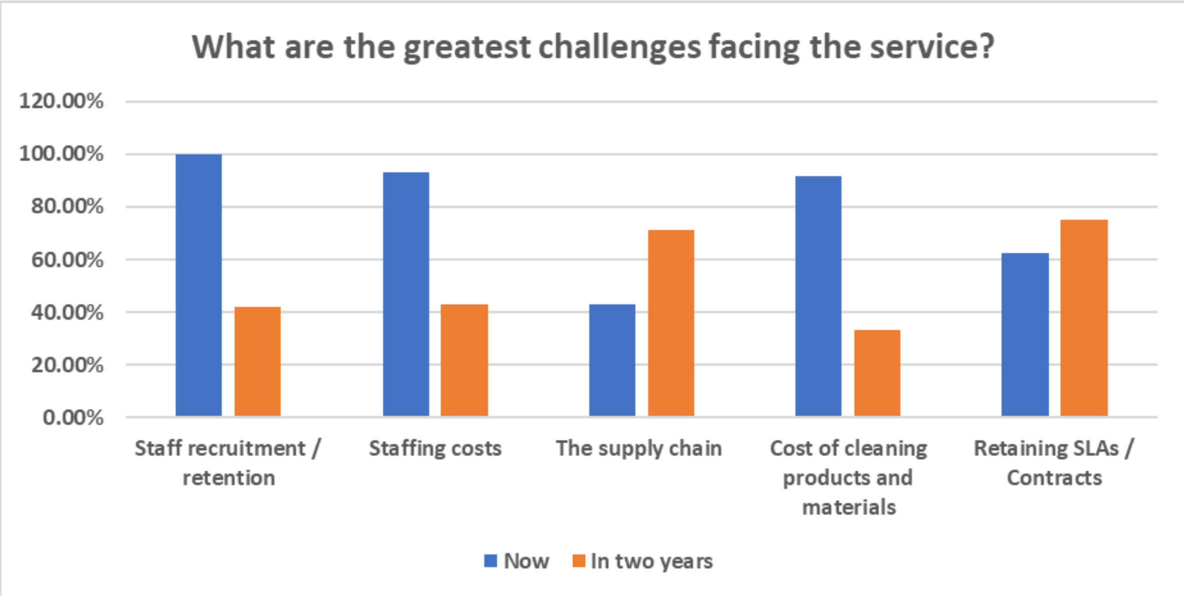
Two other changes that respondents have advised that have been implemented are the change in cleaning products, (76.47%) and also investment in cleaning equipment with 72.22% of respondents stating this to be the case

It is also clear that there are no plans for building cleaning services to decrease staff or staff hours for both frontline staff or managers with the vast majority of respondents reporting that there were no plans in this area.

5. Comments on the future

What are the greatest challenges facing the service?

The survey sought to gain a snapshot of the perceptions on the future challenges for the service now and in the next two years. The graph below provides an overview of these perceptions.

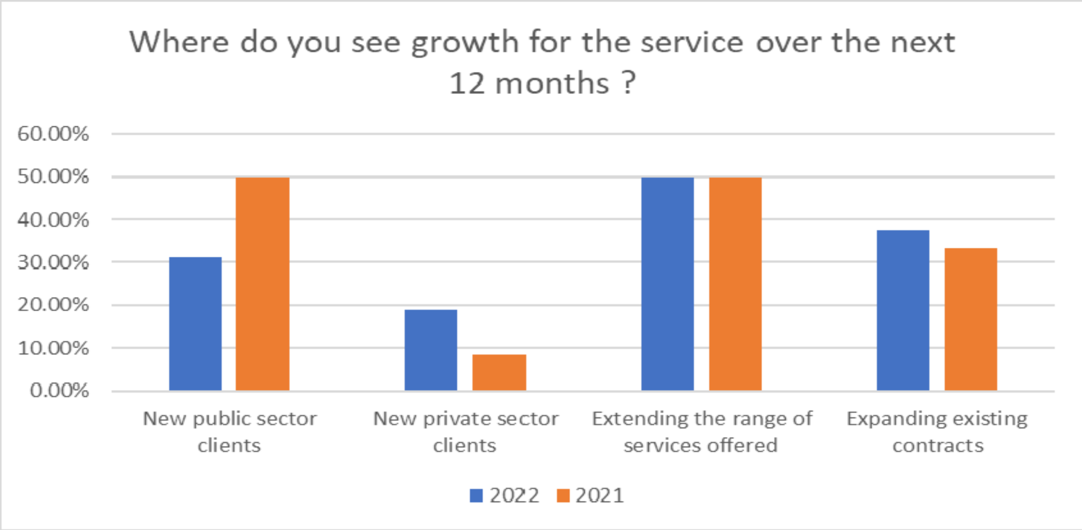


All of the respondents have reported that staff recruitment/retention is the main challenge currently. Staff recruitment and retention was challenging for the service prior to the pandemic but has now been exacerbated due to the ageing workforce, competition in the jobs market with sectors such as hospitality and the supermarkets and the increase in demand for the service. A high 92.86% of respondents stated staffing costs were also a current challenge and 91.67% advised that the cost of cleaning products and materials is also challenging. The responses from the survey are consistent with what is being reported across the wider cleaning sector.

The future challenges are reported as being the supply chain (71.43%) and retaining SLA's and contracts (75.00%).

Where do you see growth for the service over the next 12 months?

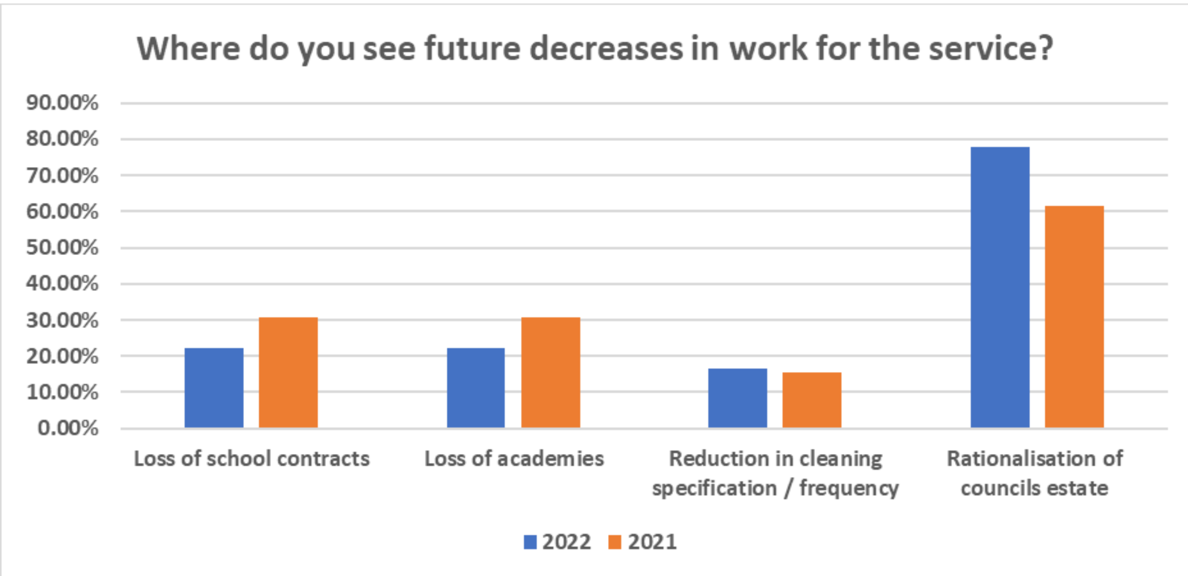
The graph below provides an overview of the perceived growth areas in the next 12 months and a comparison with perceptions in 2021.



Over the past year, local authorities have demonstrated that they have the ability and expertise to respond flexibly, maintain high standards and service continuity in unprecedented times. Therefore, there has been an increase in opportunities to offer a wider range of services to schools and other clients and this is reflected in the response to comments on future areas of growth with 50% of respondents seeing this as an area of growth over the next 12 months

Where do you see future decreases in work for the service?

Future decreases that respondents predict for the service over the next 12 months are detailed in the graph below, and also a comparison with where councils predicted a decrease in work in 2021.



The perceptions of future decrease for 2022 are consistent with what was thought in 2021, and it is no surprise that the rationalisation of council estates has been highlighted as the largest area for decrease with 77.7% of respondents believing this to be the case in 2022. The decrease in the service anticipated from the rationalisation of the council estate is linked to the changing working practices and the rapid mobilisation to home working.

APSE Comment

As with FM Services in School Catering the value of Building Cleaning Services has been recognised during the pandemic. Whilst often regarded as a high cost item to schools and public buildings' budgets the value of hygiene cleaning came back to the fore in helping to prevent the spread of infectious matter. However, this recognition does not alleviate the challenges faced within the sector.

The potential further rationalisation of the public sector estate could decrease the service coverage and create issues of loss of economies of scale. On the other end of the spectrum the issue of pay and rewards again creates concerns as the sector competes with retail and hospitality jobs, in a market saturated with vacancies, exacerbating recruitment issues.

Pay is a concern with the NJC pay rise coming in at 1.75% in 2021, leaving the sector within the sphere of low pay and condensing the differences between public sector pay, and lower paid work, within the wider economy. Whilst the national living wage increases are welcome alongside the payment of the real living wage in reality the sector is still a relatively low-paid sector and is now competing to fill vacancies within a marketplace where the pay differences have all but disappeared.
Future apprenticeships, career pathways and the wider benefits of local government as an employer in terms of paid leave, access to a pension, and training and so forth will all need to be a focus of future recruitment and retention strategies.

Vickie Hacking, APSE Principal Advisor

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 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 Crematorium
- Climate Change and Renewable Energy Network
- Environmental Health Advisory Group
- Housing, Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Roads, Highways and Street Lighting

- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing

If you require any further information on the findings of this State of the Market survey 2022, please contact Vickie Hacking at vhacking@apse.org.uk or by phone at 0161 772 1810.