



association for public service excellence

State of the Market 2024

Local authority cleaning services



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State of the Market 2024

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About APSE

The Association for Public Service Excellence (APSE) is a not-for-profit local government body working with over 300 councils throughout the UK.

Promoting excellence in public services, APSE is the foremost specialist in local authority frontline services and operates one of the UK's largest research programmes in local government policy and frontline service delivery matters.

1. Local Authority Building Cleaning Services – State of the Market 2024

APSE conducted an online survey in December 2023 and January 2024, which was sent out to local authority building cleaning contacts throughout the UK. 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.

2. Results

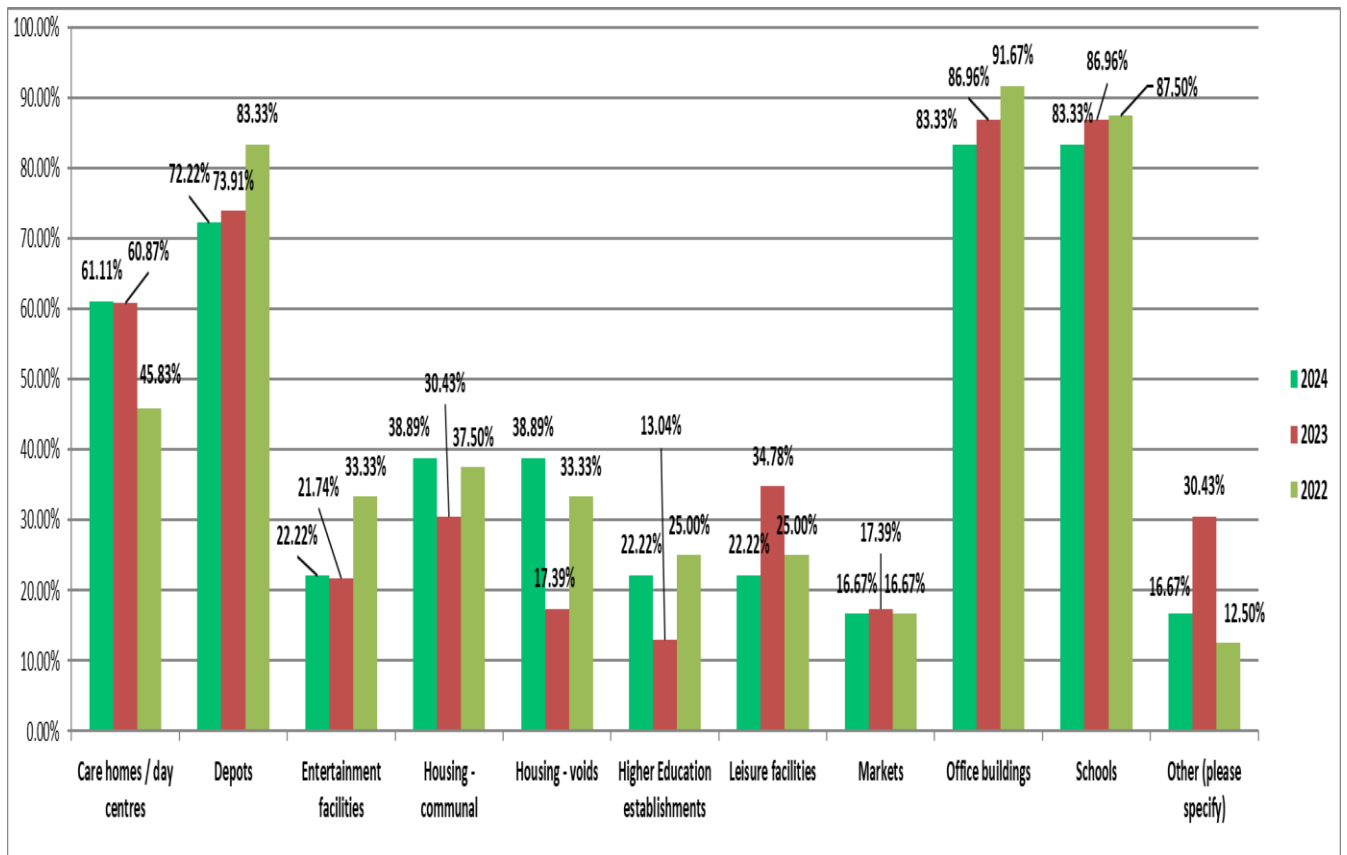
Respondents were UK wide with 44.83% from England, 41.38% from Scotland, 3.45% from Northern Ireland and 10.34% from Wales. The survey therefore reflects APSE's UK-wide membership and provides a national reflection of opinion.

3. Scope

3.1 What buildings does your service currently clean?

The survey sought to establish what mix of buildings that the service cleaned. The graph below provides an overview of the responses for 2024 and a comparison with the responses received to the 2023 and 2022 State of the Market surveys.

As the chart below demonstrates, office buildings and schools remain the most predominant of the types of building cleaned by the service with 83.33% of respondents stating this to be the case. The responses for 2023 and 2024 are relatively consistent except for housing voids that has increased from 30.48% to 38.89% and leisure facilities that has seen a decrease of 12.56%.

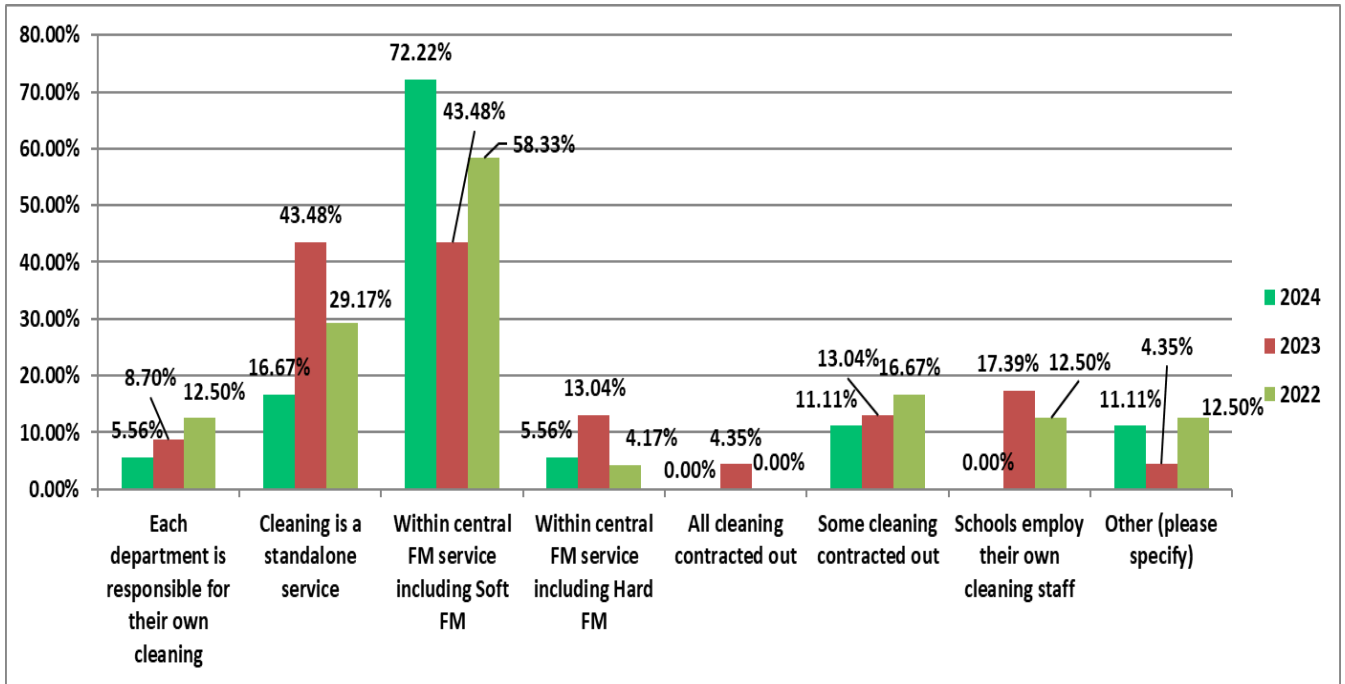


In addition to the buildings cleaned referred to in the graph above, for the 2024 survey respondents also confirmed that the service cleaned the following: -

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

3.2 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.



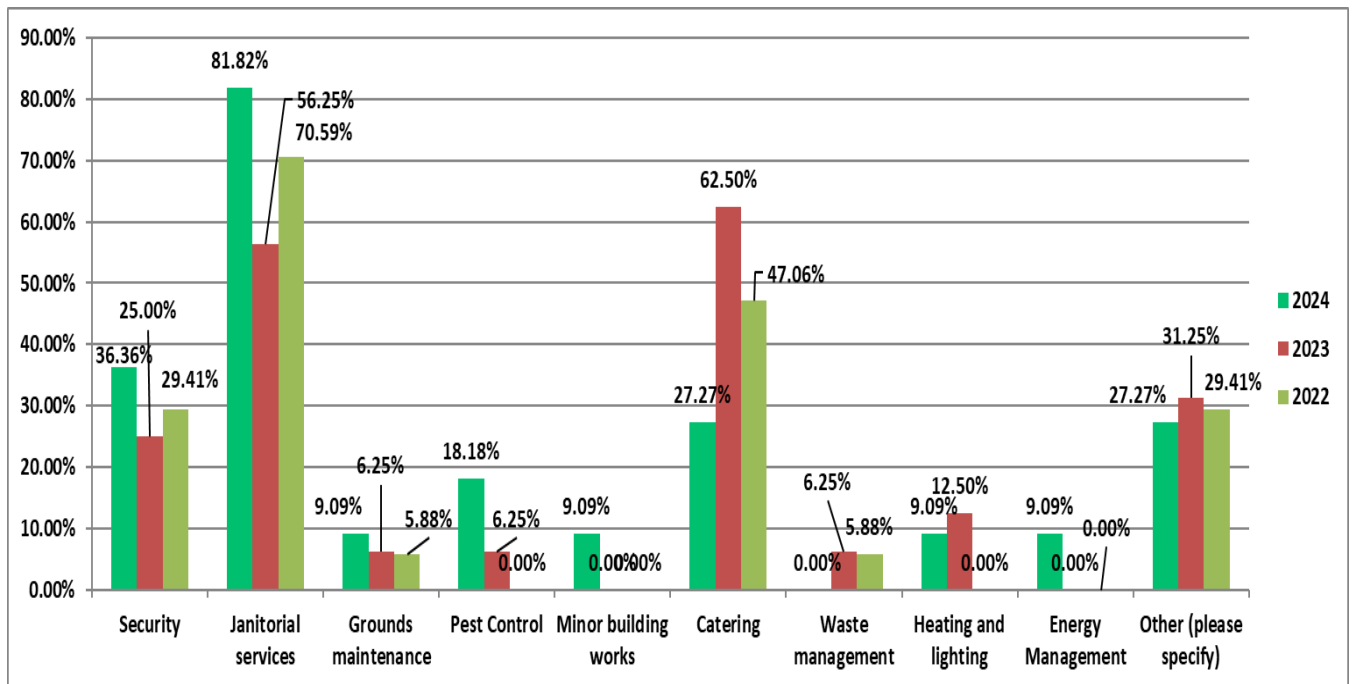
The largest portion of respondents report that the cleaning service sits within a central FM service that includes Soft FM (72.22%), with a further 16.67% reporting that cleaning is a standalone service and none of the respondents advised that all the cleaning service was contracted out.

From the responses received, it is clear that there has been a change in how the cleaning service is organised with fewer local authorities having a standalone cleaning service, in favor of cleaning siting within a central FM service.

Although the reasons for this are not specified in the survey, the severe budgets pressures that councils are facing and the need to find efficiency are a factor in the changes to the way the service is organised.

3.3 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 2023 and 2022 State of the Market surveys.



The greatest number of respondents, 81.82%, report that they are responsible for the janitorial service, which is an increase from 56.25% when compared to 2023. The number of respondents reporting that they are responsible for catering has seen the greatest decrease when compared to 2023 with just under a third of respondents reporting that they are responsible for catering.

It is difficult to explain the decrease in the those reporting that they are responsible for catering, it could be due to a small number of local authorities opting to stop providing the service, or alternatively, in Scotland and Wales where there has been an extension to the free school meals programme, the management could have been allocated to a manager with sole responsibility for the catering to deliver the increase.

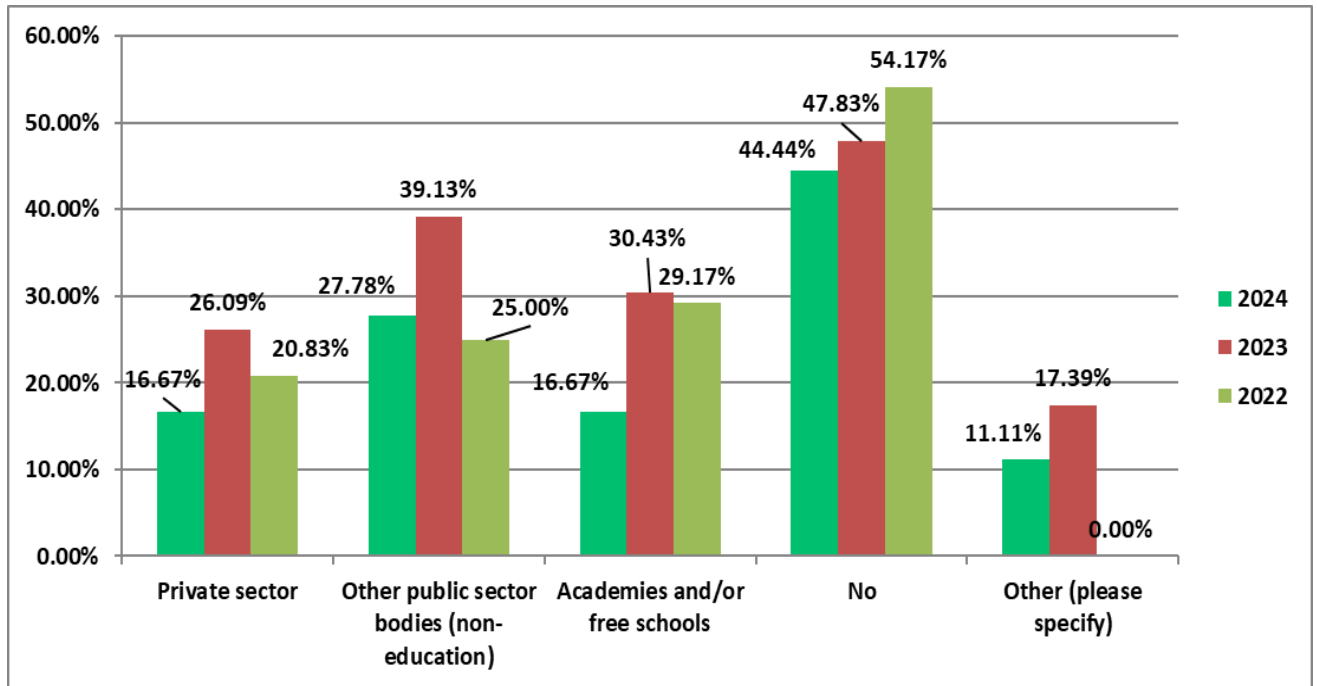
In addition to the list of services provided in the above graph, there were also a range of other services that respondents reported offering, and these include: -

- 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.

3.3 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 respondents report that they sell services outside the authority for 2024, (27.78%) advise that they sell services to the other public sector bodies and 16.67% state that they sell their services to the private sector or academies.

Just under half of the respondents, 44.44%, advise that they do not sell services outside the local authority. This is at a three-year low when comparing with the 2023 and 2022 survey and a reduction of 9.73% from 2022 but remains the most common response.

The number of respondents reporting that they sell services outside the local authority has seen a decrease in all areas for 2024. This could be due to the retention and recruitment issues experienced within the service and the need for the council to ensure that they meet the obligations of the internal contracts prior to tendering and entering into contracts outside the authority area.

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

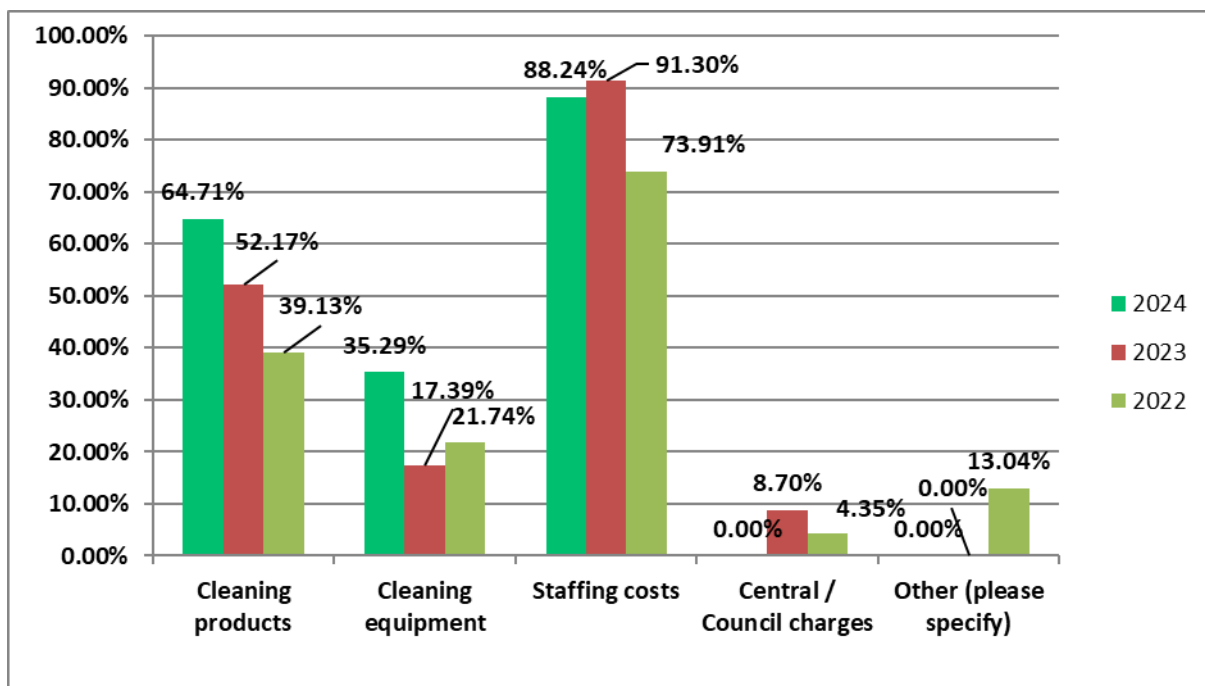
For the 2024 survey (27.78%), expect that the budget will increase or significantly increase in the next year, 27.78% of respondents believed that the budget would

stay the same and 44.45% reported that they expected the budget to decrease or significant decrease in the next year.

The expectation that budgets will decrease over the next year is no surprise with the wider severe budget pressures that councils are experiencing.

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

To gain an understanding of the pressures on the cleaning service, the State of the Market survey asked where the greatest price rises had been seen. The graph below provides an overview of the responses received for 2024, 2023 and 2022.



The vast majority of respondents, 88.24%, reported that staffing costs have seen the greatest price rise, which is a slight decrease from last year.

64.71% of respondents report that cleaning products have seen the greatest price rise, followed by 35.29% advising that cleaning equipment is the area where the greatest price rises have been experienced.

In the past year there has been the greatest price inflation experienced in decades, therefore it is no surprise that cleaning products and equipment are two areas that respondents are reporting seeing the greatest price rises.

With the recent increases in local government pay of which the highest increases were targeted at the lower paid workers to support them with the cost-of-living crisis and with staffing costs being the largest proportion of the budget for the cleaning

service, it is to be expected that the largest portion of respondents are reporting the greatest increase in costs has been seen in staff wages.

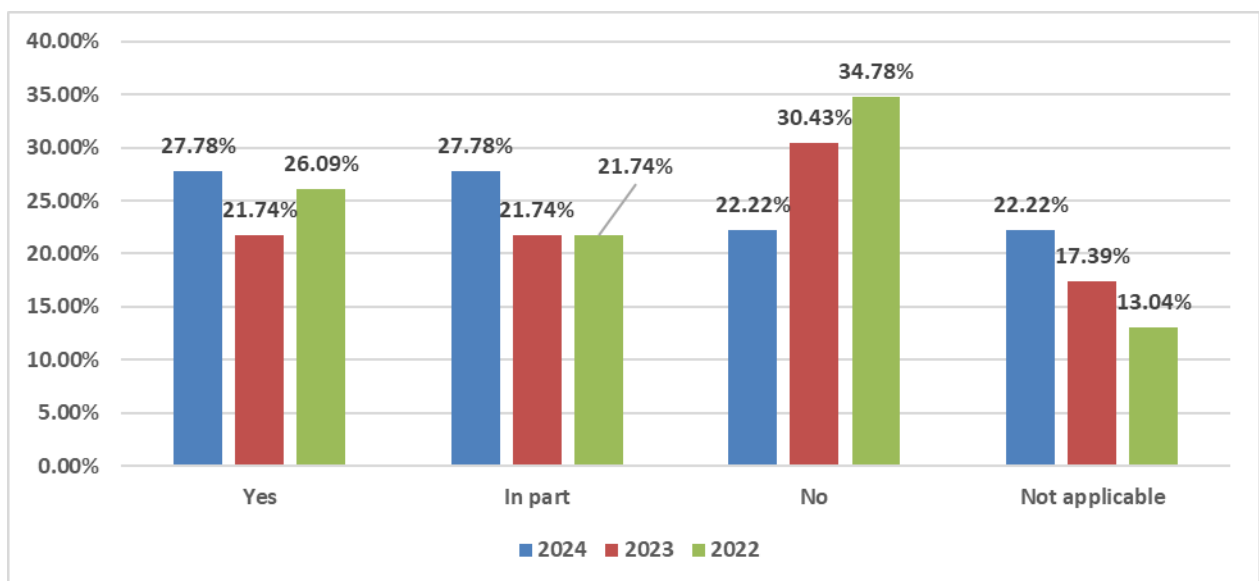
3.6 What has the service done to mitigate price rises.

In response to the price rises, over half (52.94%) of the respondents advised that the service had sourced alternative products / equipment, while 35.29% reported that they had changed suppliers, 17.65% advised that they have changed cleaning specifications and a small minority 5.88% state that they have reduced staff hours.

In the comments to this question, it was reported that due to the highest rising cost being staffing it was difficult to absorb the increase and not pass the cost on to the customer.

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

The chart below provides an overview of the responses to this question: -



The responses to this question over the past three years demonstrate that despite councils taking action to mitigate the increase in the cost of cleaning products and cleaning equipment, the price rises have been too high to mitigate. Therefore, they are passing the increases onto the customer with a 6.04% increase in respondents reporting that they had passed on the cost of the price rise or had passed on part of the cost to customers.

4. Staffing and workload

4.1 How do you expect the 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 majority of respondents (57.14%) anticipated that the workload of the cleaning section would increase, 35.71% believed that it would stay the same and 7.14% expected it to increase.

In terms of personal workload, an overwhelming majority of respondents, 92.86% stated that they thought it would increase, none of the respondents thought it would stay the same and 7.14% expected it to decrease.

The reason for over 90% of respondents believing that their personal workload would increase could be attributed to the recruitment and retention issues and the severe pressure on council budgets resulting in fewer staff to undertake the work, both of which are regularly discussed at the APSE FM and Building Cleaning Advisory Group.

4.2 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. 64.29% of respondents reported that they held regular appraisals, 78.57% provided regular staff training, 35.71% circulate a regular cleaning section newsletter and 21.43% of respondents reported that the organisation holds the Investors in People accreditation.

In the comments associated with this question, it is clear that councils provide a variety of training to their staff in addition to the above including regular supervisory training, and carbon literacy training.

The responses to this question demonstrate that despite the challenges of providing training to staff that often work low hours, and off site, there is a recognition that staff training is not only important to ensure regulatory compliance but as an investment in the workforce.

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

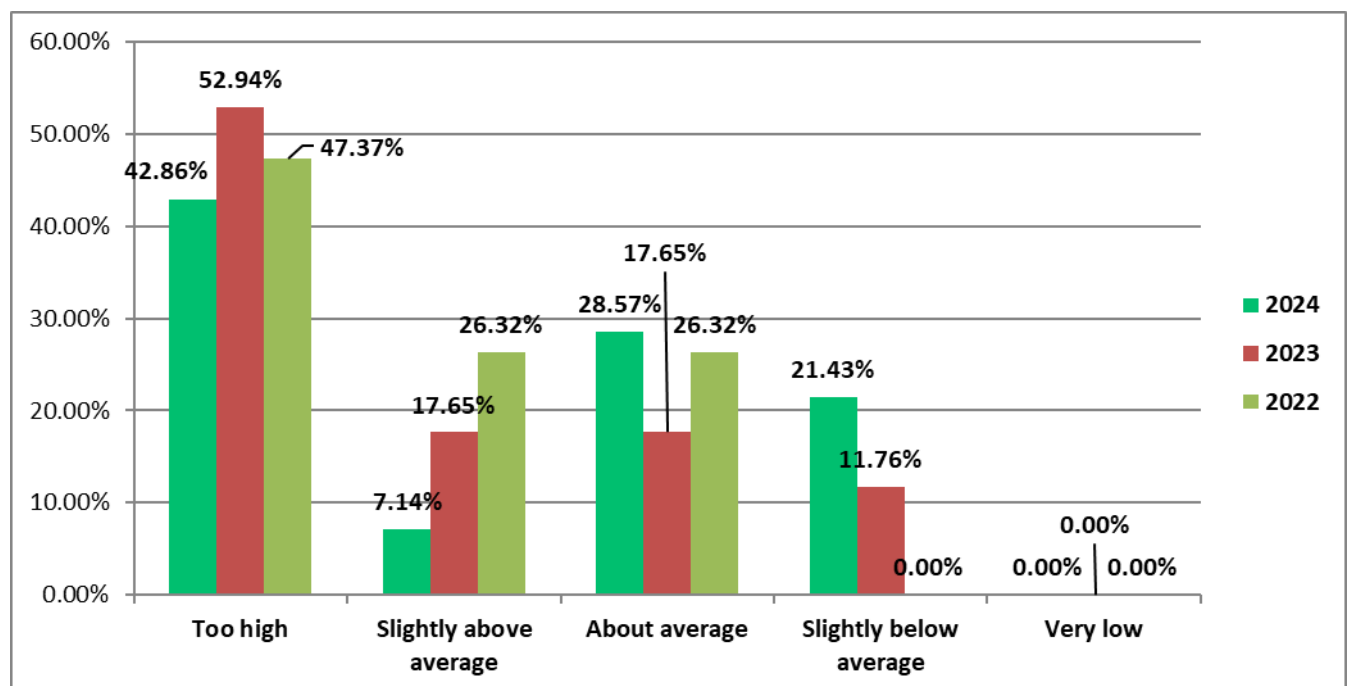
The survey asked what the expectation was for staffing levels over the next year, 7.14% of the respondents predicted that staffing levels would increase or

significantly increase in the next 12 months, 28.57% believed that staffing levels would stay the same and 64.29% thought that levels would decrease.

As already mentioned in this report, the majority of respondents expecting staffing levels to decrease could be directly related to the recruitment and retention issues being experienced not only in local authority cleaning services but in the wider sector and also the pressures on council budgets.

4.4 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 2024, 2023 and the 2022 State of the Market Surveys.



For 2024, half of respondents to the survey believe that staff absence is slightly above average, or too high, which is a decrease from the 70.59% reported this to be the case last year.

The number of respondents reporting that staff absence is about average has increased by 10.92% when compared to last year and is at a similar level to that was reported in 2022.

There has also been an increase in the number of respondents advising that staff absence was slightly below average with 21.43% reporting this to be the case.

The responses to this question demonstrate that the perception regarding staff

absence has improved since 2023. However, with half of the respondents reporting that they believed it was too high or slightly above average, it is clear that staff absence is a challenge for the service.

At the APSE FM and building cleaning advisory groups it has been reported that there has been an increase in stress-related staff absence which could be in part related to burnout post the pandemic and the impact of the cost-of-living crisis.

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

In response to this question, all the respondents report that their service pays the higher Living Wage Foundation Living Wage.

For the purposes of comparison, the lowest current basic hourly rate of pay for cleaning staff reported in 2022 was £9.25, the highest amount was £9.91 and the average rate amongst respondents was £9.48.

In 2024, the lowest current basic hourly rate reported was £10.80, the highest was £12.59 and the average rate is £12.31. This represents a 29.85% increase in the average rate of pay.

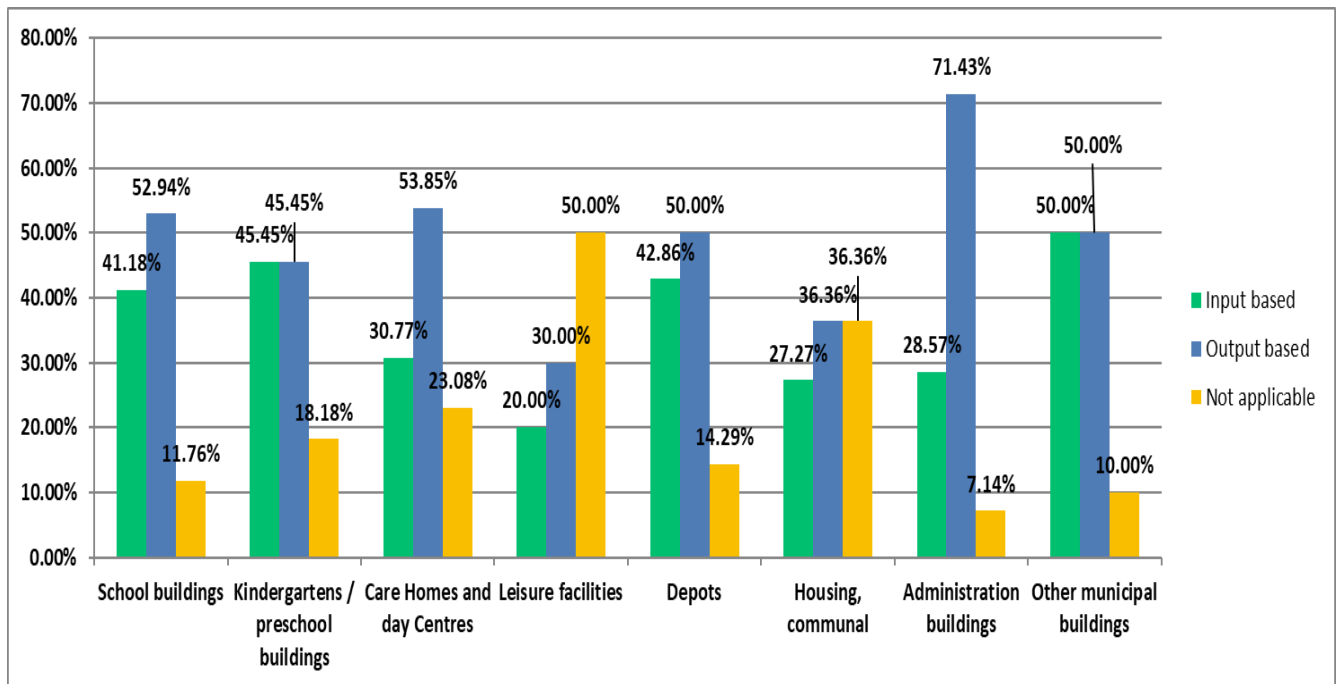
With the cleaning workforce being made up predominantly of women working part-time hours, the increase seen in pay is necessary and not only supports with the cost of living but also has benefits for the local economy. However, with costs rising across the service, the additional costs relating to pay are placing extra pressure on the service. The wage increases are in effect unfunded in terms of the local government financial settlement figures.

5 Cleaning methodology, standards, and sustainability

5.1 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 graph below provides an overview of the range of responses received.



The responses received show that the predominant specification remains an output specification for the majority of building types and that most cleaning services are working to an output-based specification, especially in administrative buildings with 71.43% reporting this to be the case.

5.2 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. Many respondents, 50.00%, advised they used an internally agreed standard, a further 55.56% reported that BICS standards were used with all their cleaning work and 11.11% 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.

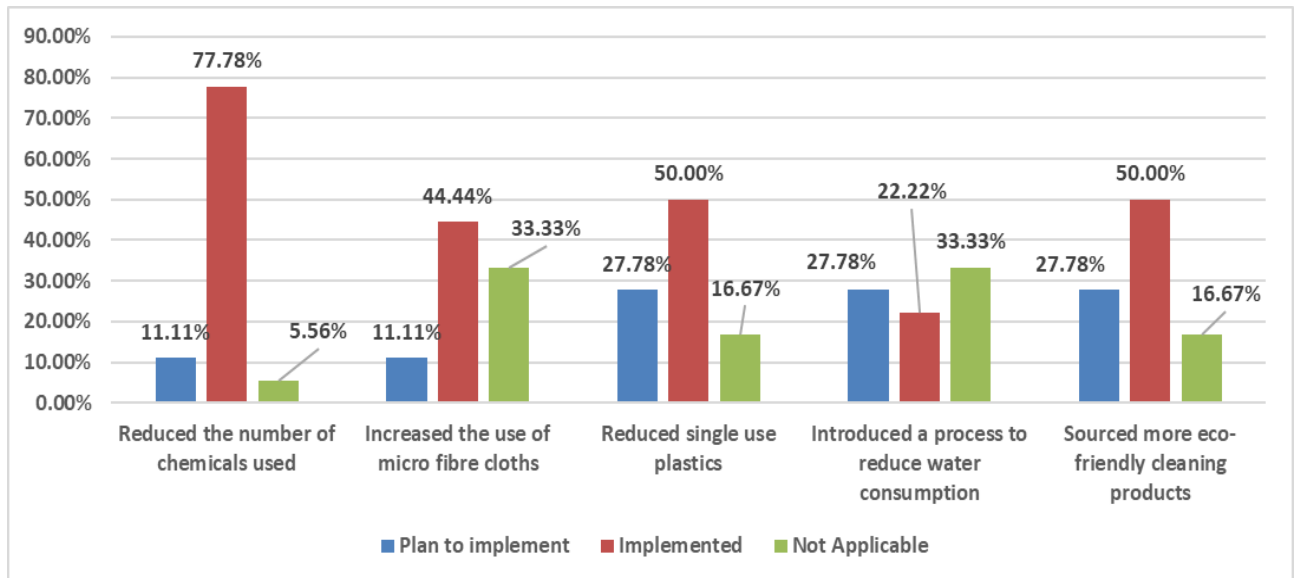
Building Cleaning Inspection App – APSE Performance Networks have developed a new app to support councils when carrying out building cleaning inspections and audits. Further information regarding the app can be obtained via the link below: -

[Cleaning audit management system](#)

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

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

With the increased focus on sustainability, the 2024, 2023 and 2022 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.

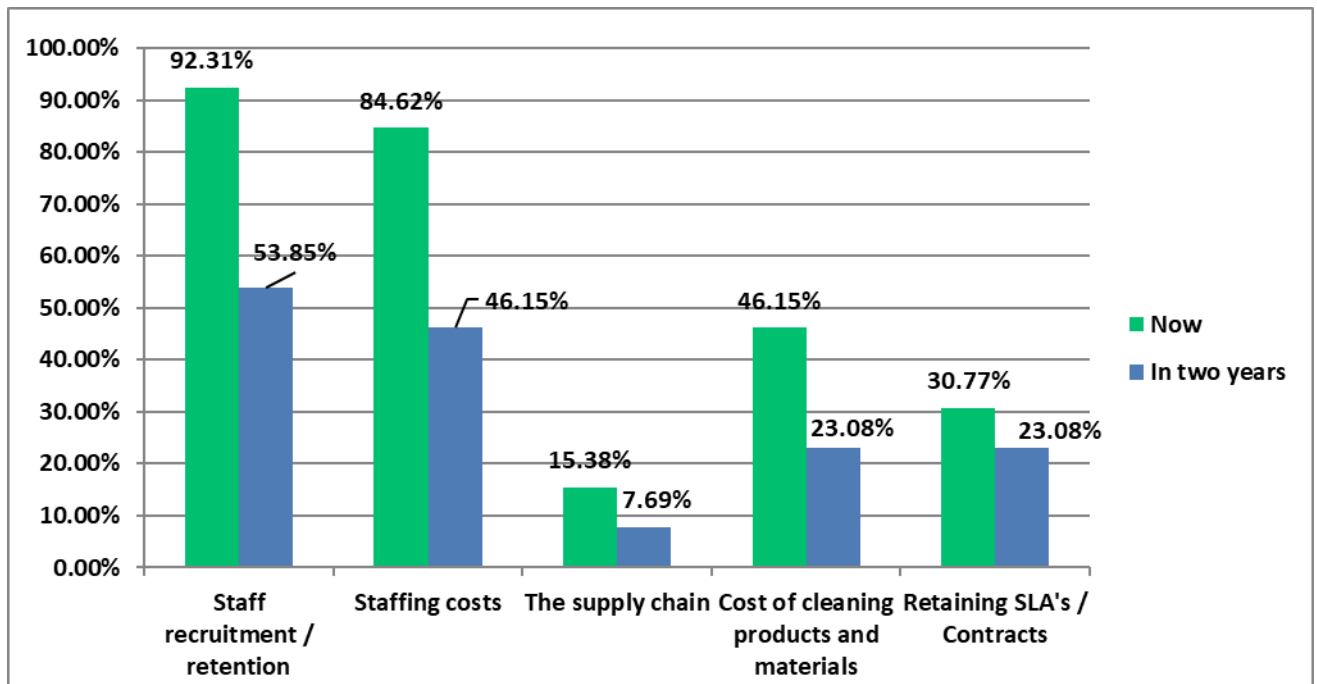


The responses show that local authorities are now implementing measures to make the service more sustainable. A large number of the respondents, (77.78%), reported that they were reducing the number of chemicals the service used and 50.00% advised that they had reduced single use plastic usage and had sourced more eco-friendly cleaning products.

6. Comments on the future

6.1 What are the greatest challenges facing the service?

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

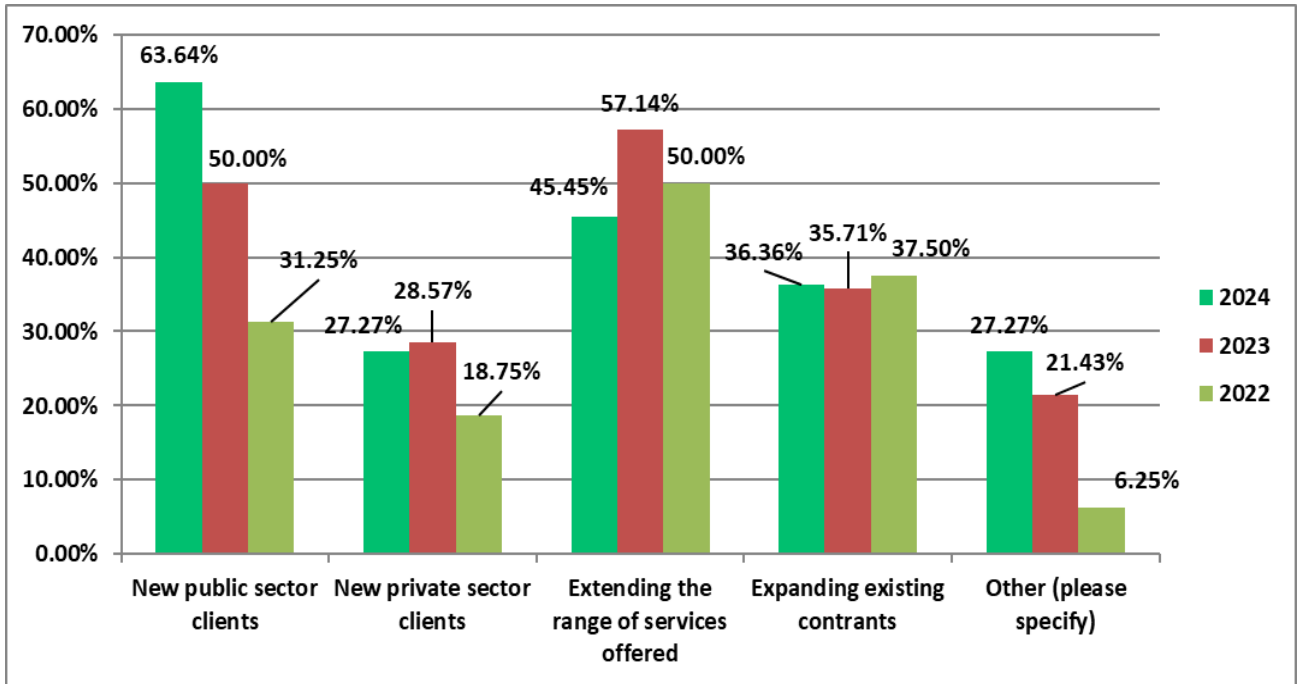


The vast majority of the respondents, 92.31%, have reported that staff recruitment/retention is the main challenge currently. Staff recruitment and retention was challenging for the service prior to the pandemic but has now been exacerbated due to the ageing workforce, competition in the jobs market with sectors such as hospitality and the supermarkets and the increase in demand for the service. It is also being reported at APSE's FM and building cleaning advisory group that the recent changes to the benefits system coupled with the recent pay rises are impacting on recruitment and retention.

A high number of respondents (84.62%) stated that staffing costs were also a current challenge and 46.15% 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.

6.2 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 2023 and 2022.



Over the past few years, local authorities have demonstrated that they have the ability and expertise to respond flexibly, maintain high standards and service continuity in unprecedented times.

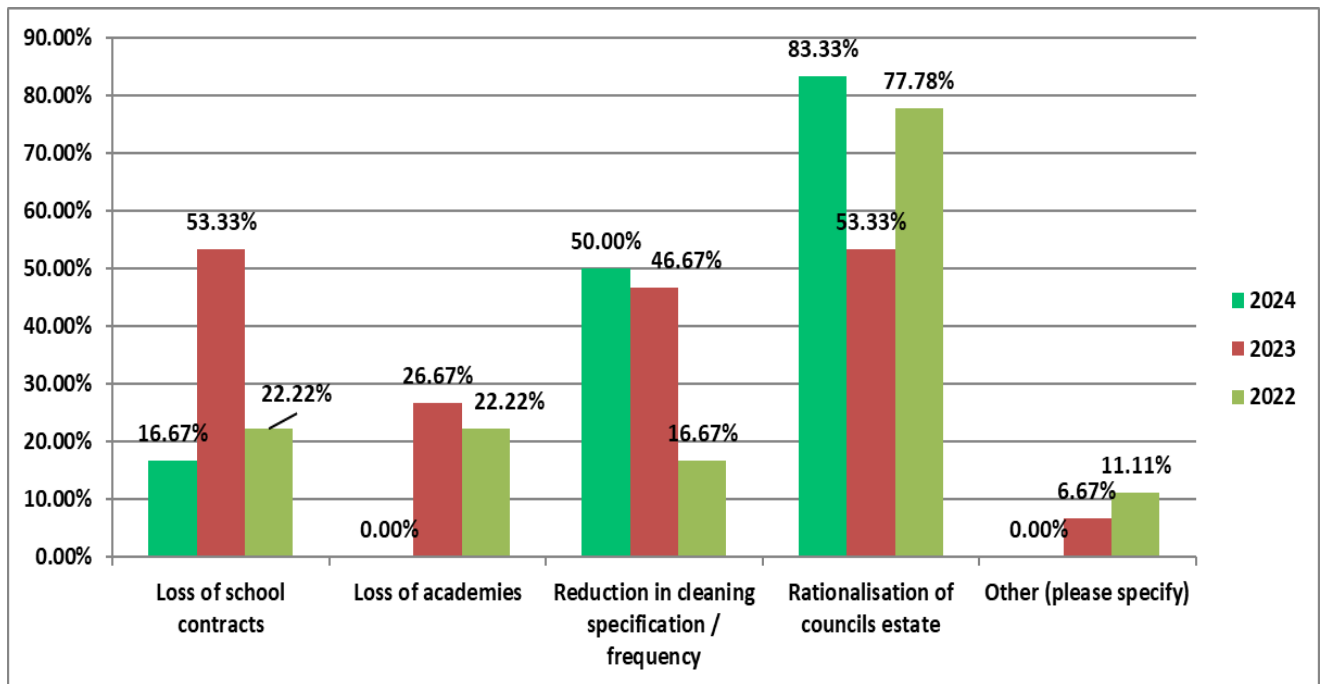
However, there has been a decrease from 57.14% of respondents reporting that they saw growth in extending the range of services offered to 45.45% in 2024.

There could be for many reasons for this, but it is logical to attribute the issues with recruitment and retention and staff absence for the decline as councils are advising that they are focusing on delivering the current contracts rather than tendering for new contracts.

However, there is an increase in the belief that the area of increase will be in new public sector contracts, although there are recruitment and retention issues, public sector contracts are more likely to be comparable in terms of expertise and the specification of current contracts, therefore pose less risk.

6.3 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 2023 and 2022.



The reported future decreases for 2024 show that the perception that rationalisation of the council estate is seen as the greatest area decrease with 83.33% of respondents believing this to be the case. This decrease in the service, anticipated from the rationalisation of the council estate, is clearly linked to the changing working practices with the rapid mobilisation to home working, during the pandemic, and the common practice of hybrid working post the pandemic. Coupled with these changes many local councils are reviewing their estates to ascertain areas where savings can be achieved due to the severe budget pressures that local authorities are facing.

There has been a decrease of 36.66% of respondents believing that the loss of school contracts would be an area of decrease in the service and there has been a reduction from 26.67% to 0% of respondents reporting that they thought that the loss of academies would be an area of decrease.

The reasons for fewer respondents believing this to be case is not captured in the survey, but this could be due to the pandemic and schools recognising the importance of the cleaning service, resulting in more certainty that the current contracts with schools and academies will be retained.

APSE Comment

As with FM Services in School Catering the value of Building Cleaning Services was 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. Although the focus on COVID-19 has reduced with the success of the vaccine, there are now other diseases impacting the population, especially in children, such as the rises in Measles cases. Therefore, the need for cleaning as an infection control measure is still very much a focus. 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. At 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 settled in November 2023, 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. Where building cleaning and FM services are effectively treated as traded services, whilst many welcome the long-over-due pay increases, through the NJC and national minimum wage, it nevertheless adds a further pressure on service budgets.

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

Sign up for APSE membership to enjoy a whole range of benefits.

APSE member authorities have access to a 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: -

- FM and Building cleaning
- Catering (School Meals)
- Cemeteries and Crematoria
- Cost of Providing/Cost of Living Network
- Highways and Street Lighting
- Housing, Construction and Building Maintenance
- Local Authority Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Recovery and Renewal
- Renewables and Climate Change
- Roads, highways, and street lighting
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing

Visit www.apse.org.uk for more detail.



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