association for public service excellence

State of the Market 2025

Local authority cleaning services

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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.

Results at a glance

Management of the service

Offices and schools are the predominant buildings cleaned	**95.24%**
Building cleaning is a standalone service	**52.38%**
Sell services to academies	**42.86%**

Budget and finance

The service budget will decrease or significantly decrease in the next year	**52.38%**
The greatest increase in cost to the service are staffing costs	**85.00%**
Sourcing of alternative products / equipment to mitigate price rises	**65.00%**
Passed on price rises to the client in full or in part	**70.00%**

Staffing

Staff absence levels are perceived to be too high	**42.11%**
Provide regular staff training	**81.25%**

Environmental issues

Implemented a reduction in the number of chemicals used	**63.16%**
Planning to implement a process to reduce water consumption	**55.56%**

1. Local Authority Building Cleaning Services – State of the Market 2025

APSE conducted an online survey 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 provide performance reports for building cleaning services which includes cost, quality and productivity indicators.

2. Results

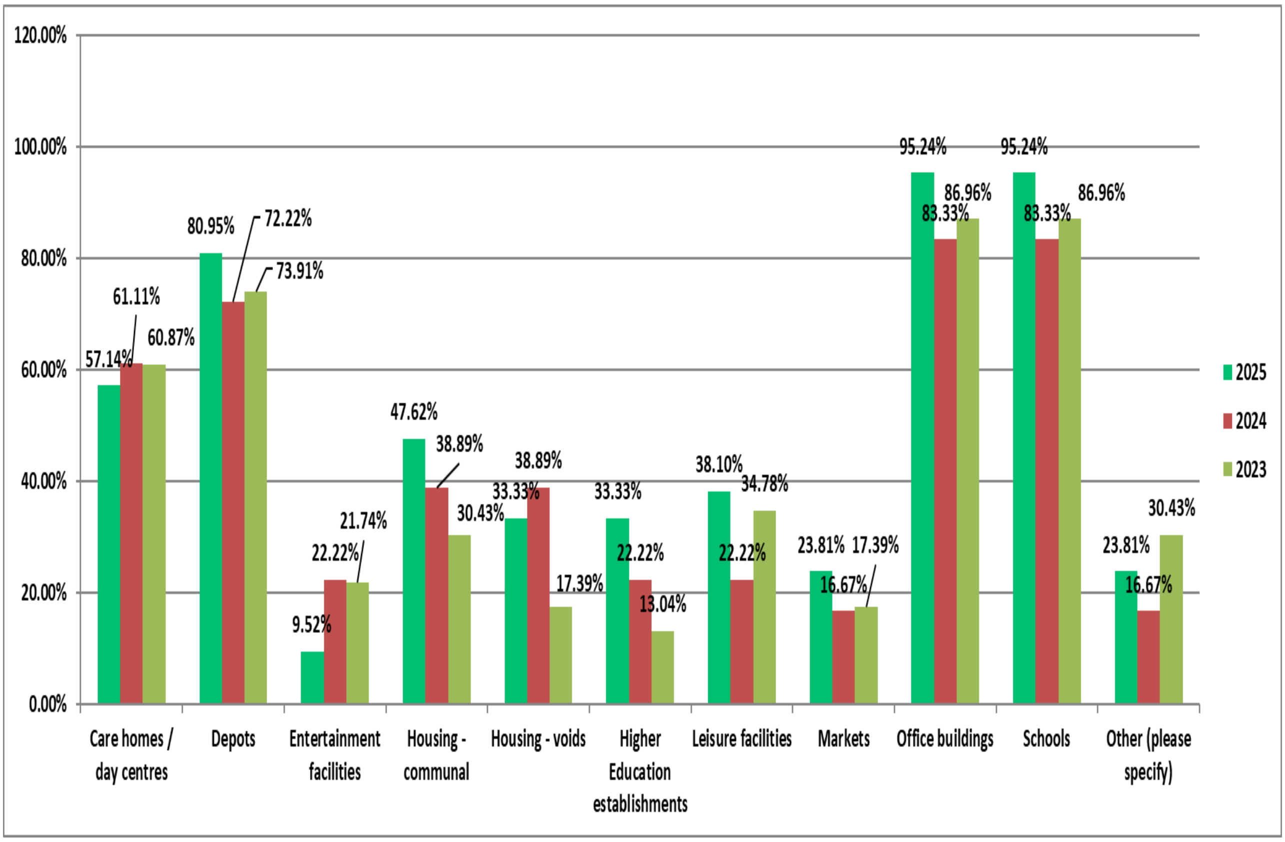
Respondents were UK wide with 45.83% from England, 45.83% from Scotland, and 8.31% from Wales. The survey therefore reflects APSE's UK-wide membership and provides a national reflection of opinion.

3. Scope

3.1 What buildings does your service currently clean?

The survey sought to establish what mix of buildings the service cleaned. The graph below provides an overview of the responses for 2025 and a comparison with the responses received to the 2024 and 2023 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 95.24% of respondents stating this to be the case. When comparing the responses for 2025, with the responses from 2024, it is clear that there has been an increase in the number of respondents reporting that they clean depots, leisure facilities, higher education establishments and communal areas in housing. This could indicate that following the pandemic and the issues experienced regarding recruitment and retention, the service has now stabilised and are now in a position to seek additional work.

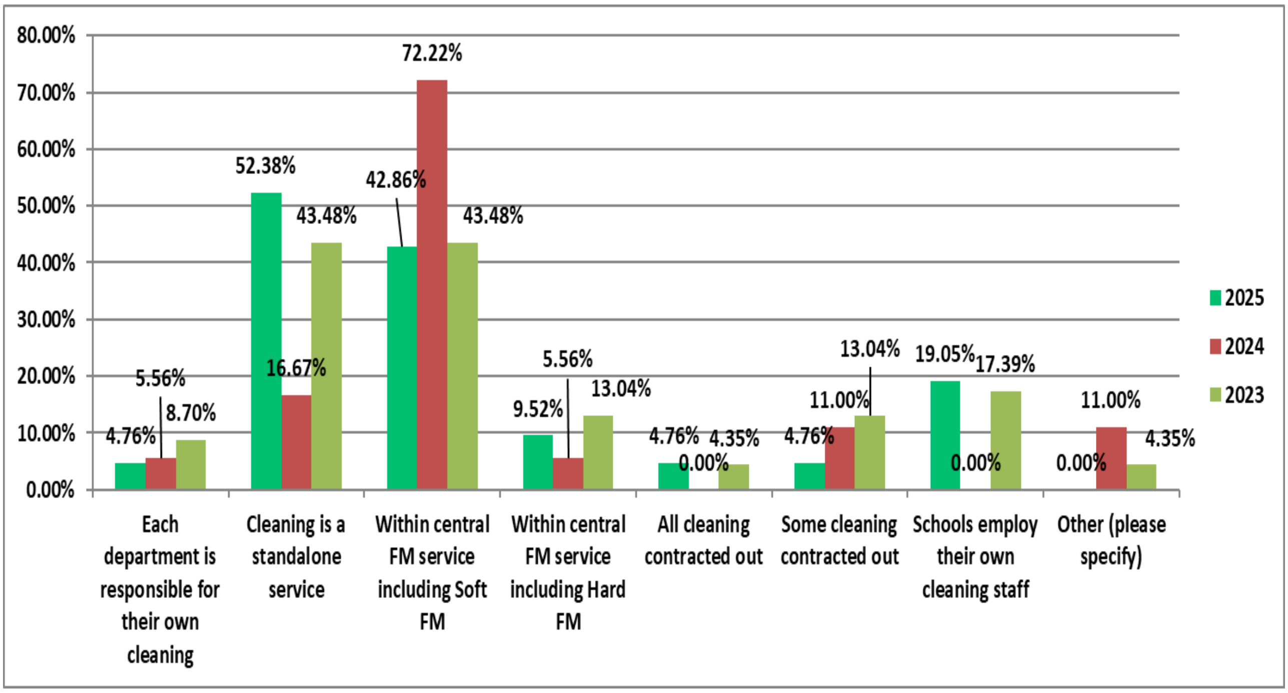


In addition to the buildings cleaned referred to in the graph above, for the 2025 survey respondents also confirmed that the service cleaned the following: -

- 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.



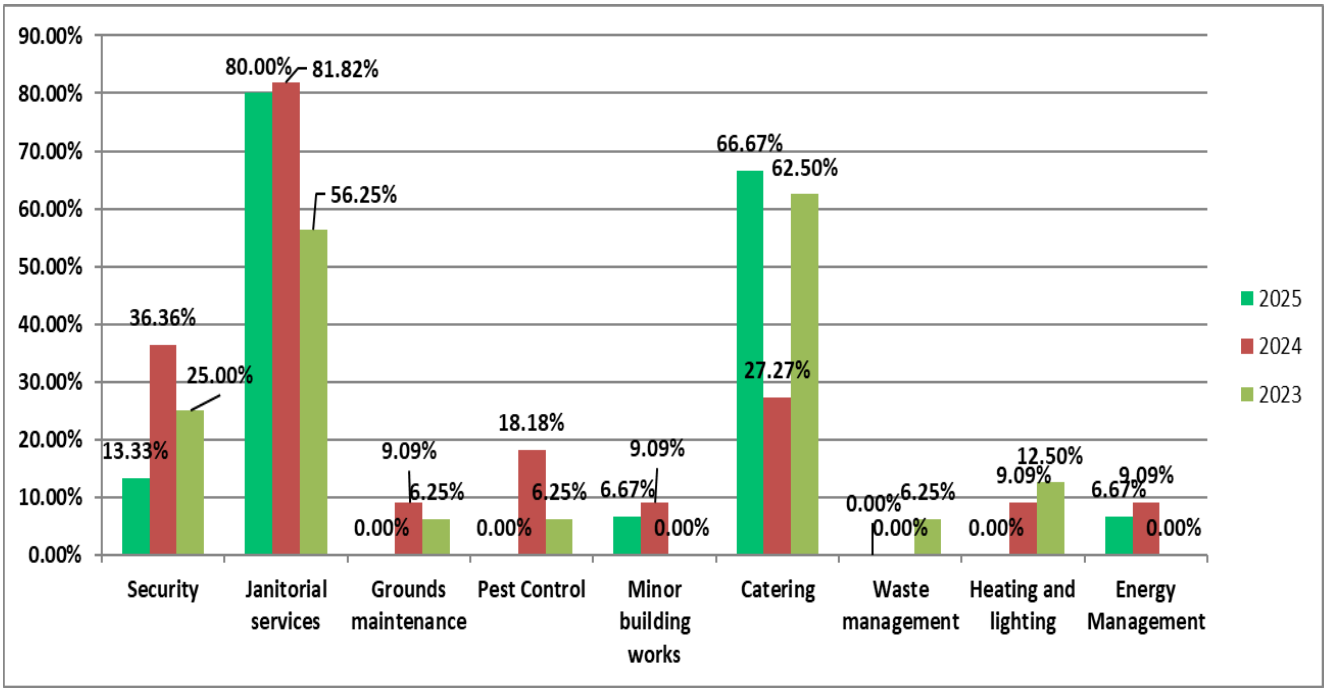
The largest portion of respondents report that the cleaning service is a standalone service with 52.38% of respondents reporting this to be the case, a further 42.86% reported that cleaning is within a central FM service including soft FM and 4.76% report that each department is responsible for their own cleaning or all cleaning is contracted out.

The data shows that there has been nearly a 30% decrease in the number of respondents reporting that the cleaning service sits within a central FM service including soft FM.

Although the reasons for this are not specified in the survey, the severe budgets pressures councils are facing is resulting in services been required to seek opportunities for income generation and having a standalone cleaning service maybe the delivery model councils are opting for delivering on this.

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 2024 and 2023 State of the Market surveys.



The greatest number of respondents, 80.00%, report that they are responsible for the janitorial service, which is consistent with what was reported in 2023. The number of respondents reporting that they are responsible for catering has seen an increase from 27.27% in 2024 to 66.67% in 2025, which is the highest that it has been over the last three years.

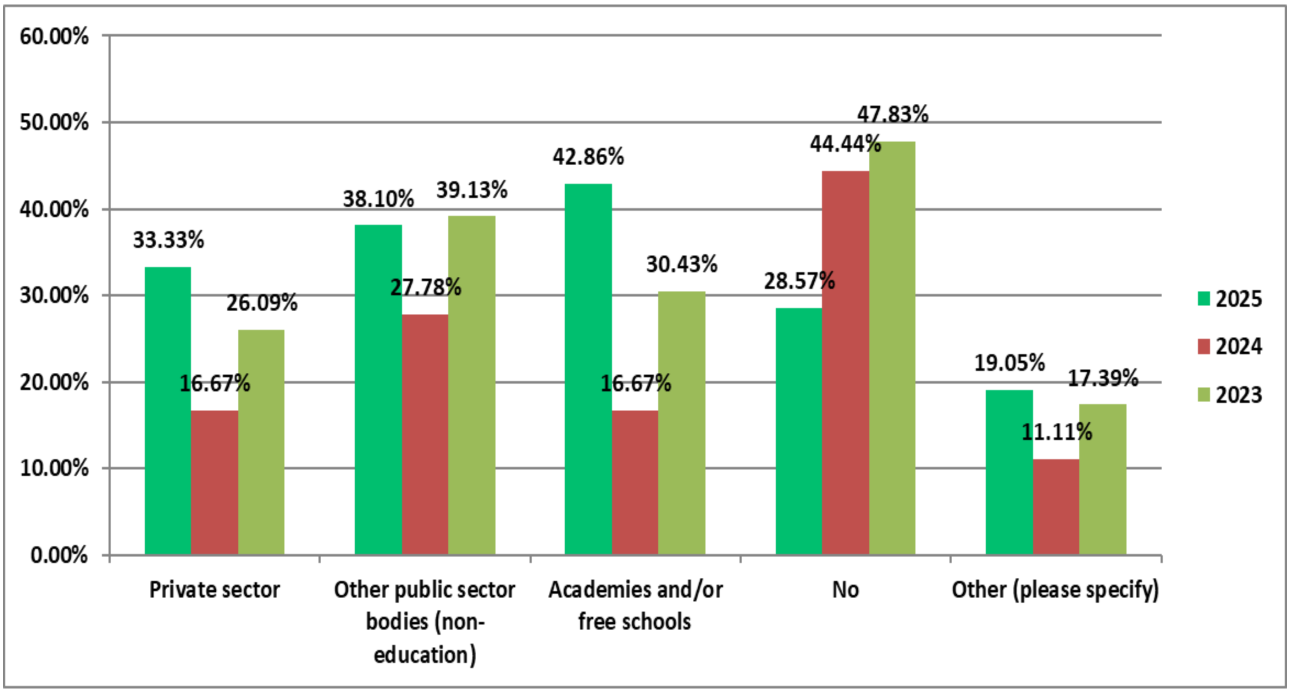
In addition to the list of services provided in the above graph, there was also a range of other services that respondents reported offering, and these include: -

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

The survey highlights that the role of a' 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 (42.86%) report that they sell services to academies or free schools, 38.10% advise that they sell services to the other public sector bodies and 33.33% state that they sell their services to the private sector

There has been a decrease of 15.87% of respondents reporting that they did not sell their services outside the local authority, and this is the lowest number of respondents reporting this to be the case since 2023.

The responses to the 2025 survey highlight that when the survey was undertaken there had been a decrease in the number of respondents stating that they carried out cleaning outside of the local authority, and this in part was attributed to the capacity of the workforce to deliver on the contracts. However, the data for 2025 appears to show that councils are now overcoming the challenges and are now able to take on additional contracts.

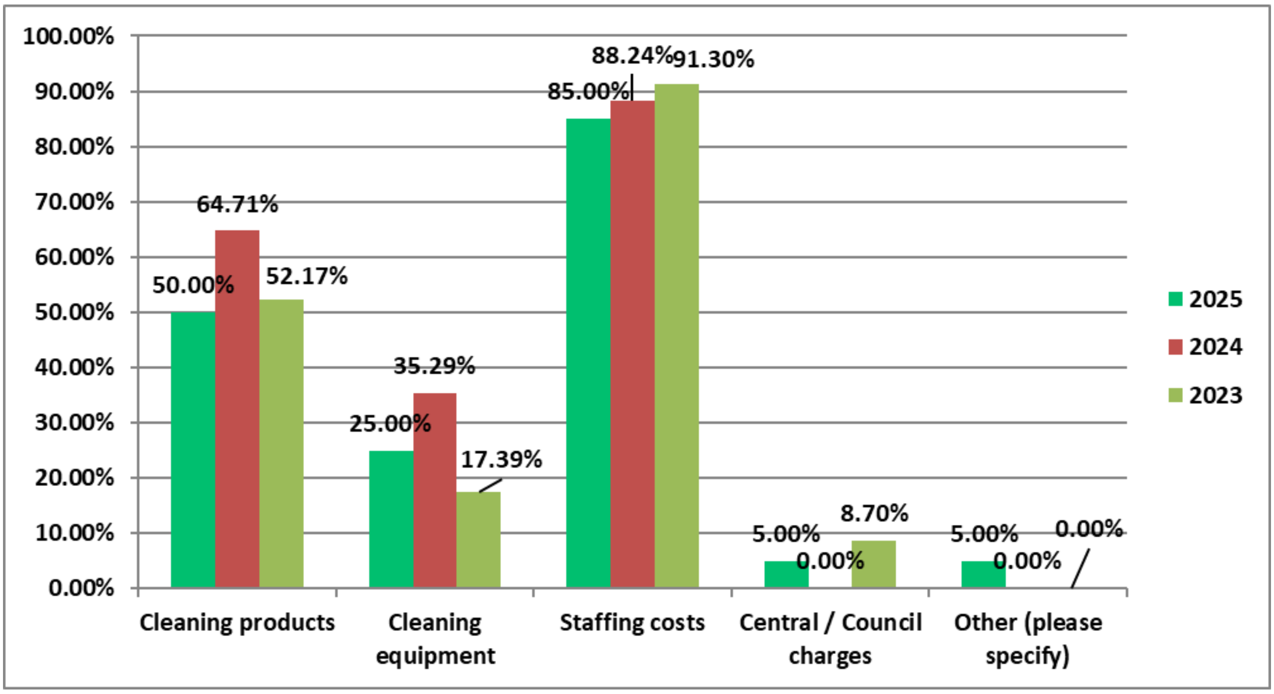
3.4 How do you expect the cleaning budget to change next year?

For the 2025 survey (14.29%), expect that the budget will increase or significantly increase in the next year which compares with 27.78% in 2024, 33.33% of respondents believed that the budget would stay the same which is comparable with 2024. Over half (52.38%) of respondents in 2025 said that they expected the budget to decrease or significantly decrease in the next year, which is an increase of 7.93% when compared to last year.

The expectation that budgets will decrease over the next year is unsurprising with the ongoing budget pressures that councils are experiencing, coupled with the increasing costs, and it would appear that in spite of better local government settlements overall additional funding will not be obvious to managers in building cleaning services.

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 2025, 2024 and 2023.



The vast majority of respondents, 85.00%, reported that staffing costs have seen the greatest price rise, which is a slight decrease from last year.

Half of respondents' report that cleaning products have seen the greatest price rise, which is a decrease of 14.71% from 2024 followed by 25.00% advising that cleaning equipment is the area where the greatest price rises have been experienced.

In 2024 and 2023 there was a period of increasing inflation of the like that had not been experienced in decades. Therefore, it is no surprise that cleaning products and equipment were the two areas that respondents reported seeing the greatest price rises. In 2025, inflationary rises have stabilised to some extent, but this has not translated into price decreases.

With the recent increases in local government pay of which the highest increases where 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.

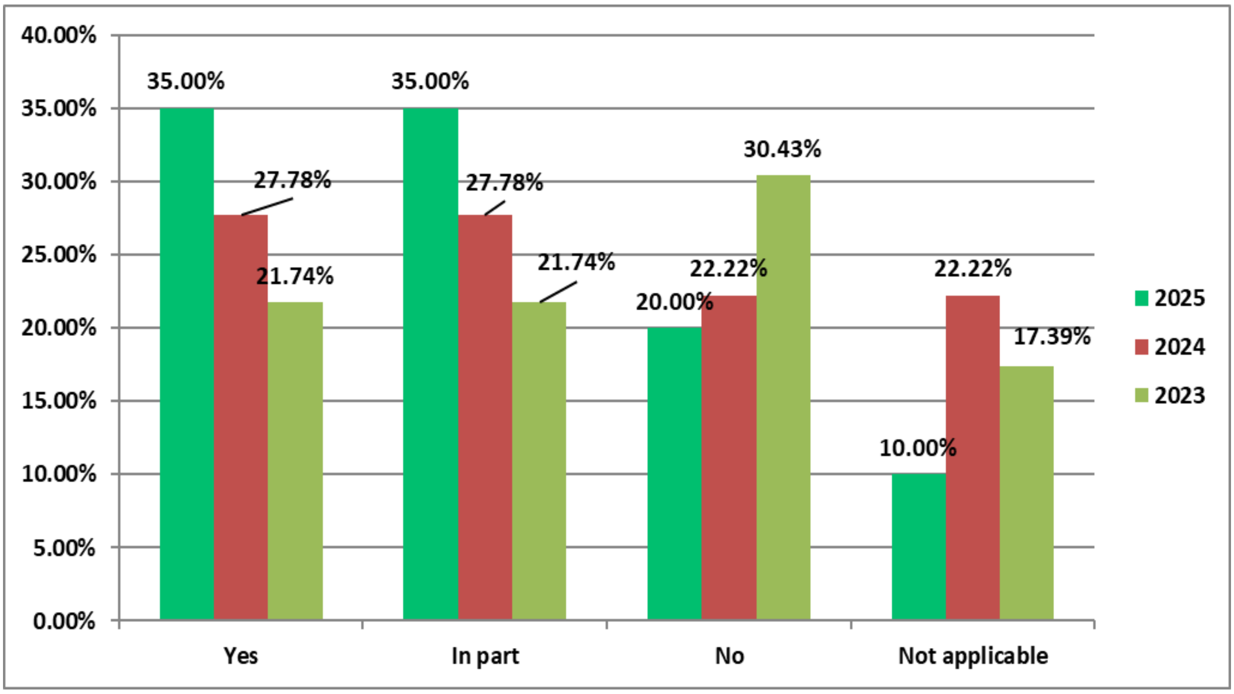
3.6 What has the service done to mitigate price rises.

In response to the price rises, over half (65.00%) of the respondents advised that the service had sourced alternative products / equipment, and 20.00% reported that they had changed suppliers,

There had been a significant increase from 17.65% of respondents in 2024 to 60.00% of respondents in 2025 that advise that they have changed cleaning specifications and a significant increase from 5.88% of respondents in 2024 to 40.00% in 2025 that state that they have reduced staff hours. Due to the competition in the cleaning sector, there is limited opportunity to pass on the rising costs to clients. Therefore, it is no surprise that service managers have to find savings in the service.

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 7.22% 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?

The survey asked how respondents anticipated the workload for the service and personally would change over the next twelve months.

Just under half of respondents (47.37%) anticipated that the workload of the cleaning section would increase, 36.84% believed that it would stay the same and 15.79% expected it to decrease.

In terms of personal workload, a majority of respondents, 73.68% stated that they thought it would increase, 21.05% thought it would stay the same and 5.26% expected it to decrease.

The reason for over 73.68% of respondents believing that their personal workload would increase could be attributed to the severe pressure on council budgets resulting in fewer staff undertaking the work, which is regularly discussed at the APSE FM and Building Cleaning Network.

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. 50% of respondents reported that they held regular appraisals, 81.25% provided regular staff training and 37.50% circulated a regular cleaning section newsletter. From the comments received from the 18.75% that answered other, it was stated that they offer online training to their staff and also provide regular supervisory training. In addition, broader training is offered in areas such as carbon literacy training.

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

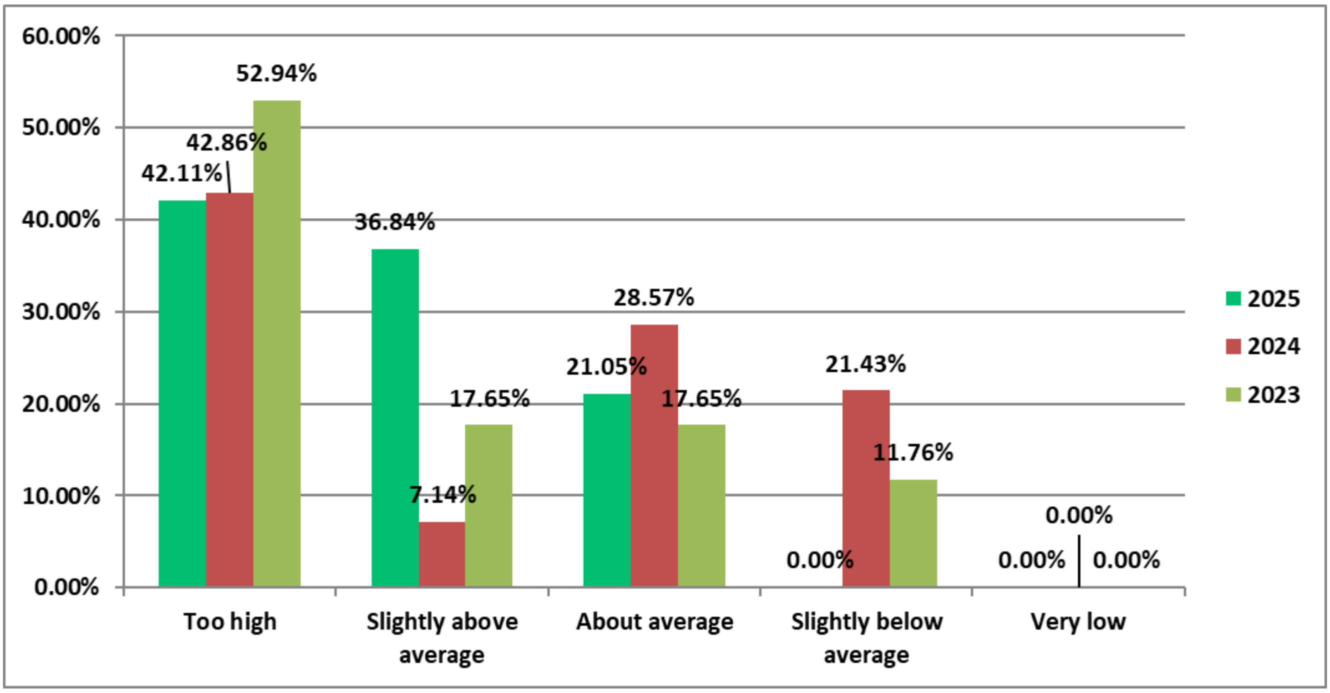
4.3 How do you expect your staffing levels to change over the next year?

The survey asked what the expectation was for staffing levels over the next year, 16.67% of the respondents predicted that staffing levels would increase or significantly increase in the next 12 months which is an increase from 7.14% of respondents believing this in 2024, 55.56% believed that staffing levels would stay the same compared with 28.57% in 2024 and there has been a significant decrease from 64.29% of respondents reporting that they thought that staffing levels would decrease in 2024 to just under a third of respondents believing this in 2025.

This change in the respondents' expectations could be attributed to the extra commercial work that the service is undertaking and also the fact that the reduction in the council estate that was predicted has not been realised.

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 2025, 2024 and the 2023 State of the Market Surveys.



For 2025, the largest number of respondents (42.11%), perceive that staff absence is too high, and 36.84% report that they believe that staff absence was slightly above average.

None of the respondents felt that the staff absence was slightly below average or very low.

The responses to this question demonstrate that the perception regarding staff absence has improved since 2023 with 10.83% less respondents in 2025 stating that staff absence was too high. However, the data clearly shows that staff absence is a challenge for the service.

At the APSE FM and building cleaning network it has been reported that there has been an increase in stress-related staff absences which could be in part related to the impact of the cost-of-living crisis, and the service being required to deliver for the client with less resources due to budget pressures. Triangulating the survey response with APSE Performance Networks suggests that overall staff absence is not significantly worsening.

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, 63.16% report that they paid the higher Living Wage Foundation Living Wage and 36.84% report that they did not.

For the purposes of comparison, the survey asked what the basic hourly rate was for cleaning staff. In 2023, respondents reported that the lowest rate was between £10.50 - £11.00 and the highest basic rate was £12.50 - £13.00.

For the current year 31.25% of respondents reported that the lowest rate was between £12.00 - £12.50 and the highest rate was over £13.00. This may shift still further with the recent minimum wage increases announced in the budget.

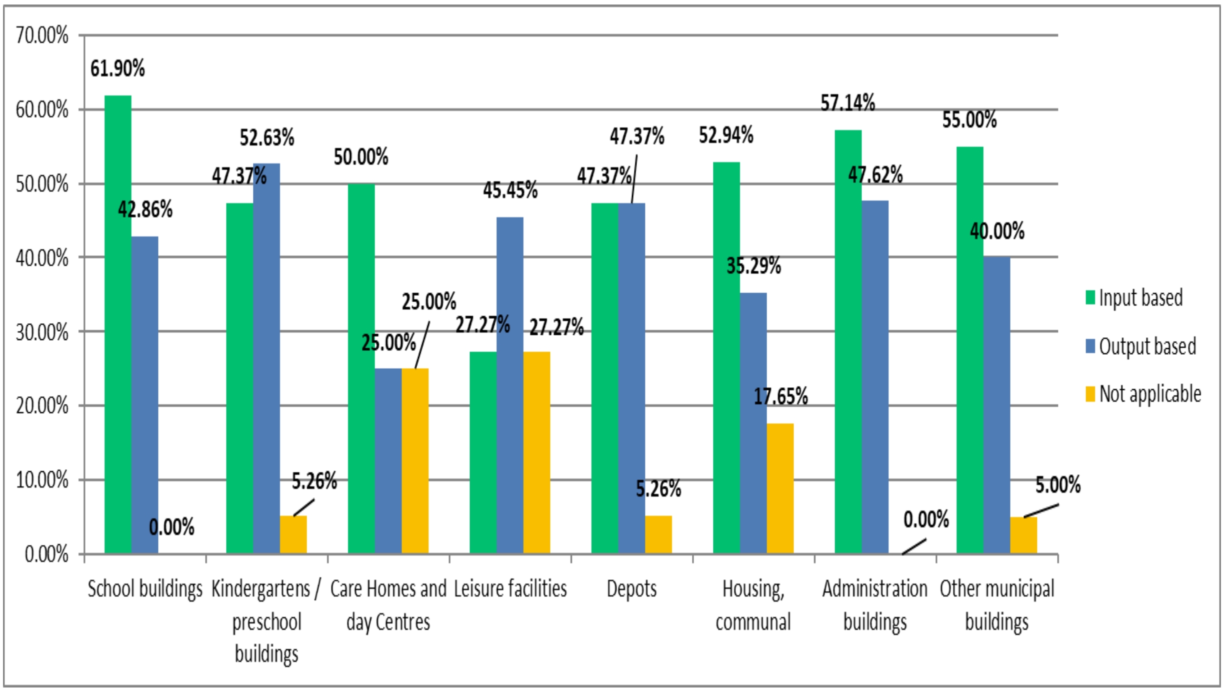
With the cleaning workforce being made up predominantly of women working part-time hours, the increase in pay is both necessary and supports local workers with the cost of living, as well as benefitting for the local economy. However, with costs rising across the service, the additional costs relating to pay are putting extra pressure on the service. The wage increases are in effect not fully funded in terms of the local government financial settlement figures, and in any event in practice form part of the traded service costs. This results in savings needing to be found from other aspects of the service, or for the costs to be passed onto the client or more commercial work to be undertaken.

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 is input based with 61.90% reporting this specification for school buildings, 57.14% reporting input-based specification was used in administration buildings and 55.00% advise that input based specification was used in other municipal buildings.

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, 52.38%, advised they used an internally agreed standard, a further 42.86% reported that BICS standards were used with all their cleaning work and 4.76% 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 – An increasing number of councils are utilising the APSE Building Cleaning Inspection App. with 14.29% of respondents advising that they use the app.

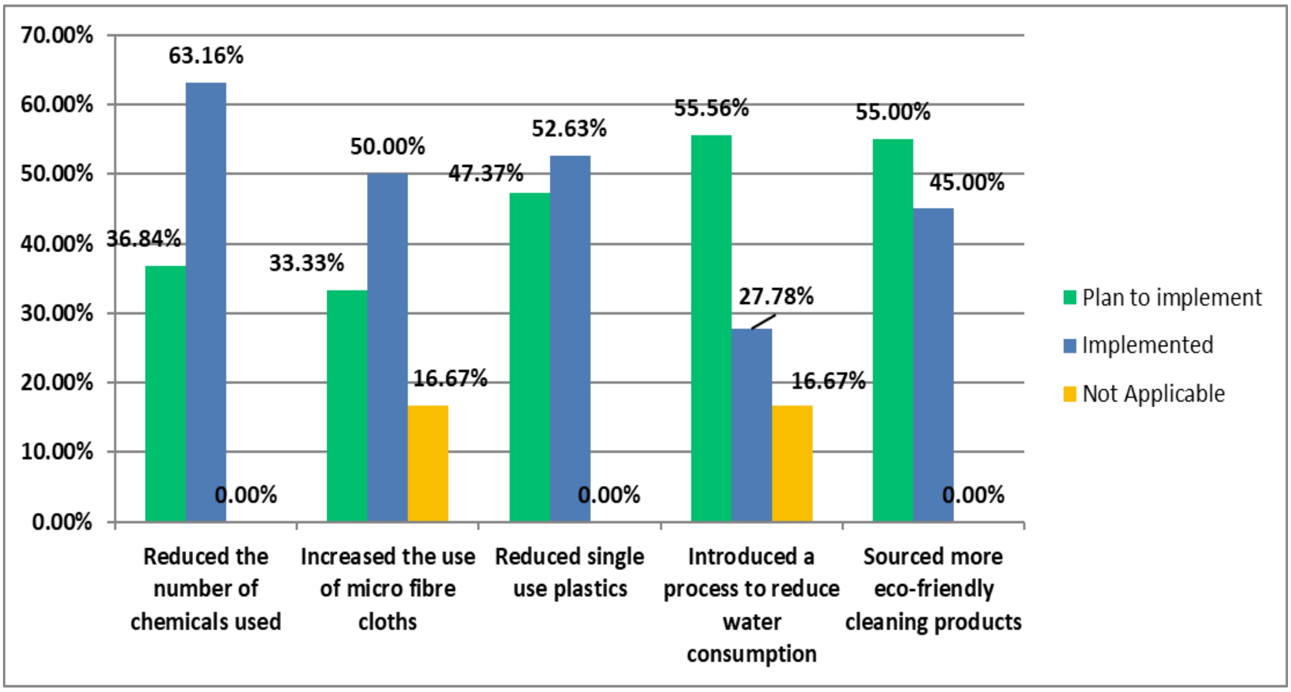
APSE Performance Networks have developed the App. to support councils when carrying out building cleaning inspections and audits. Further information regarding the app can be obtained via the link below: -

[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 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.



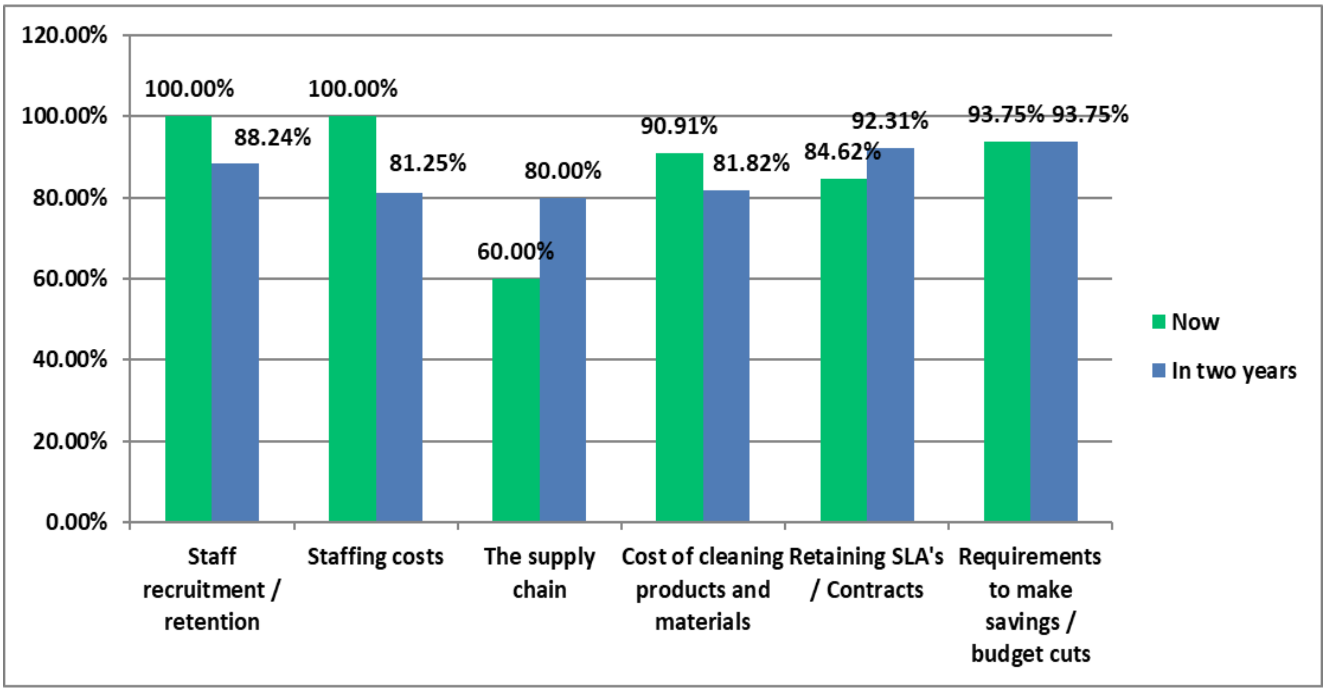
The responses show that local authorities are now implementing measures to make the service more sustainable. Many of the respondents, (63.16%), reported that they were reducing the number of chemicals the service used, 50.00 % have increased the use of micro fibre cloths.

Over half of the respondents, 55.56% and 55% respectively, are planning to implement a process to reduce water consumption and source 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.

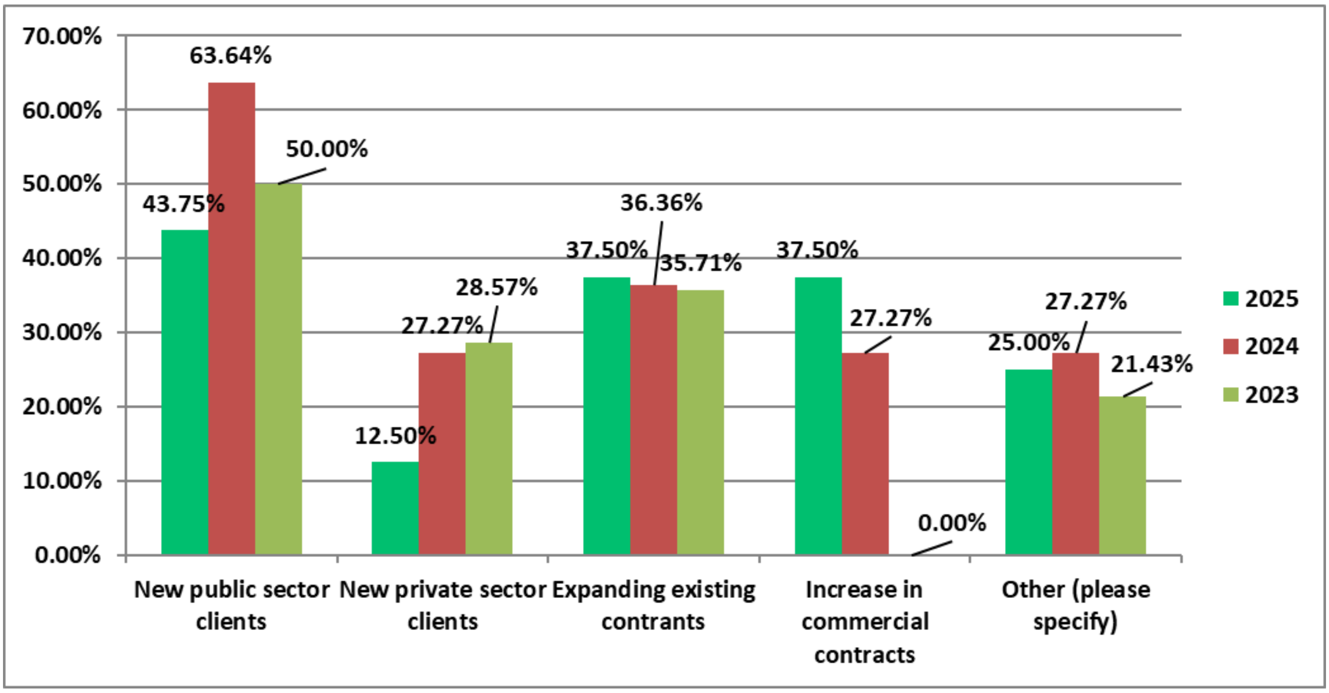


As highlighted earlier in the report, staffing costs are stated as one of the greatest challenges with all respondents reporting this to be the case. All of the respondents also reported that staff recruitment/retention is the main challenge currently. Staff recruitment and retention has been challenging for the service for several years but has now been exacerbated due to the ageing workforce, competition in the jobs market with sectors such as hospitality and supermarkets and the increase in demand for the service. It has been reported at APSE's FM and building cleaning network that the recent pay rises are impacting on recruitment and retention due to the implications that the additional pay has on the benefits that the staff receive.

A high number of respondents (93.75%) stated that the requirement to make saving or budget cuts was a current pressure and it is believed that this will still be the case in two years' time, further highlighting that rising costs and the shortfall in funding is having an impact on service.

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 2024 and 2023.

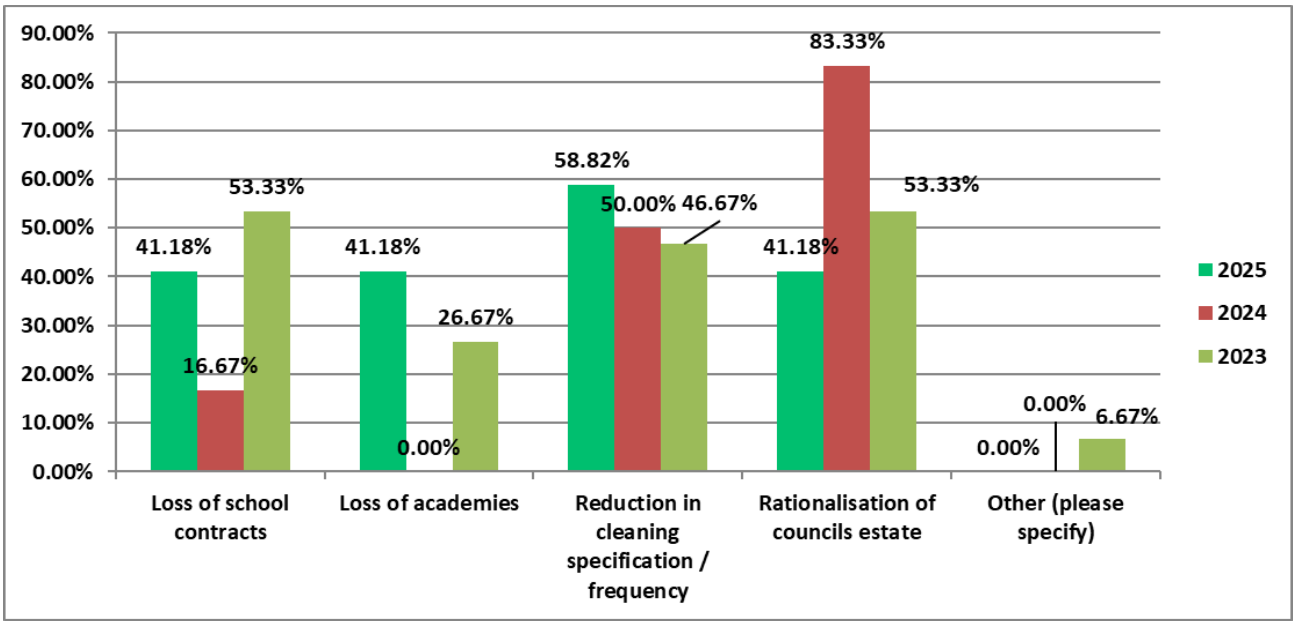


Over the past few years, local authorities have demonstrated that they have the ability and expertise to respond flexibly, maintain high standards and service continuity in unprecedented times.

There has been a decrease from 63.64% of respondents reporting in 2024 that they saw growth in new public contracts to 43.75% this year. However, there has been an increase in the number of respondents (37.50%) reporting that they saw growth in expanding existing contracts. In addition, there has also been over a 10.00% increase in the number of respondents reporting that they saw growth in increasing commercial contracts.

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 2024 and 2023.



The reported future decreases for 2025 show that there is a perception that there will be a reduction in cleaning specification or frequency with 58.82% of respondents believing this to be the case which is an increase from 46.67% of respondents believing this in 2023.

There has been a decrease of 42.15% of respondents believing that there would be a rationalisation of the council estates. The reasons for fewer respondents believing this to be case are not captured in the survey, but this could be attributed to the fact that following the COVID-19 pandemic and the move to home working, councils undertook a review of their councils' estates to assess whether they could downsize the office space. Although there has been some reduction in councils' buildings or workspace, it has not been to the extent that it was first envisaged.

However, with Local Government Reorganisation on the horizon for local authorities in England, councils will be required to review their assets, and the FM and Building Cleaning services will need to adapt accordingly. This could of course present opportunities to scale up in-house building cleaning services providing economies of scale across multiple sites and opportunities for localized recruitment policies in new council areas. APSE has set up a Local Government Reorganisation web hub and a free to attend network for APSE members on Local Government Reorganisation.

APSE Comment

Whilst often regarded as a high-cost item to schools and public building budgets, the value of hygiene cleaning is of upmost importance for helping to prevent the spread of infectious matter. Therefore, the need for cleaning as an infection control measure is still very much a focus, as demonstrated by the current flu outbreak, with healthcare professionals warning the public to remain good practice in infection control measures. However, this recognition does not alleviate the challenges faced within the sector.

The potential further rationalisation of the public sector estate due to Local Government Reorganisation in England could decrease the service coverage and create issues of loss of economies of scale but equally where building cleaning in one authority may have been hollowed out or outsourced local government reorganisation could create the conditions for a new service to serve a wider area, including education facilities, create economies of scale and develop localized recruitment. 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 remains a concern with the NJC pay settelements still lagging behind other areas of the public sector, leaving the cleaning 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

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APSE member authorities have access to a range of membership resources to assist in delivering council services. This includes our regular network, 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 networks are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

APSE Networks 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 network meetings and would like to be added to our list of contacts for your service area, please email **enquiries@apse.org.uk.**

Our national networks groups include: -

- Building cleaning and FM
- Catering
- Cemeteries and crematoria
- Local Government Reorganisation
- Veterans and Military Champions Network
- Social Value, Procurement and Commercialisation
- Housing, construction and building maintenance.
- Parks, horticultural and ground 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.

Visit https://apse.org.uk for more details.

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