BRITISH CLEANING COUNCIL

THE CLEANING AND SUPPORT SERVICES INDUSTRY

RESEARCH REPORT 2017

British Cleaning Council

The Voice of the Cleaning Industry

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1 Executive Summary / key points

- The cleaning industry provides a vital service to economy, ensuring that our workplaces, hospitals, schools, transport and public spaces are clean and pleasant to use. It contributed nearly £24.4bn to the economy in 2015.

- With more firms outsourcing cleaning contracts, there has been a significant growth in the industry. In 2011 30,900 firms operated in the industry but this now stands at more than 40,300: an increase of 27%.

- 700,000 individuals work in the industry. The South East and London accounts for the greatest share of employment with 18% and 17% of the industry employed there respectively.

- There is a high proportion of positions in the industry classed as elementary (51%). This occupational profile reflects the fact that the skills requirements for many roles are not complex and barriers to entry into the industry can be low. Consequently workers in the industry hold significantly lower levels of qualifications than the UK average.

- Overall the gender of workers is evenly spilt, but there are noticeable differences within the sub-industries. For example, cleaning of buildings is dominated by female workers (73%), while landscape service activities comprises mostly of male workers (84%).

- Nearly a quarter (23%) of the workforce are foreign born. The part-time working opportunities the industry offers can be an advantage to many.

- The industry overall has experienced greater growth in wages than all sectors. Between April 2015 and 2016 wages in the industry grew 6.4% compared to 2.3%. The pay rates between key occupations vary according to seniority and position.

- Growth in the industry is expected to continue. It is expected that there will be employment growth across higher level occupations. The industry is expected to have 467,000 job openings between 2014 and 2024: 84,000 industry growth and 383,000 replacement demand.

- The industry will see a shift towards people holding higher qualifications.

- There are a range of opportunities and challenges in the sector. New sophisticated technology and equipment is changing the industry, but the sector also needs to consider the impact of BREXIT.

2 Introduction

2.1 British Cleaning Council

The British Cleaning Council is the voice of the UK cleaning industry. It was established in 1982 to coordinate the affairs of the industry and to be responsible at home and abroad on industry matters.

The British Cleaning Council provides a forum for members to meet and work together to raise the profile of the industry and help it gain the credibility it deserves. It also promotes and encourages improvements in health, hygiene and general cleanliness standards.

The British Cleaning Council has 21 members, which cover every facet of the multi-million pound UK cleaning industry.

2.2 Cleaning Industry

The cleaning and support service industry covers a range of activities and support activities.

For example it can include the provision of a combination of support services within a client's facilities, the interior and exterior cleaning of buildings of all types, cleaning of industrial machinery, cleaning of trains, buses, planes, etc., cleaning of the inside of road and sea tankers, disinfecting and exterminating activities for buildings, ships, trains, etc., bottle cleaning, street sweeping, snow and ice removal, provision of landscape care and maintenance services and provision of these services along with the design of landscape plans and/or the construction (i.e. installation) of walkways, retaining walls, decks, fences, ponds, and similar structures.

The Standard Industrial Classification (SIC) code 81 - Services to Buildings and Landscape Activities can be used to define the industry for data collection purposes. Subindustries include:

- Combined facilities support activities (81.1)
- Cleaning activities (81.2)
- Landscape service activities (81.3)

Further details of the above sub industries can be found in the Annex.

2.3 Purpose of the report

This report seeks to provide insight in to the current state of the cleaning industry to help inform the decision making of those involved in the industry.

3 Economic landscape

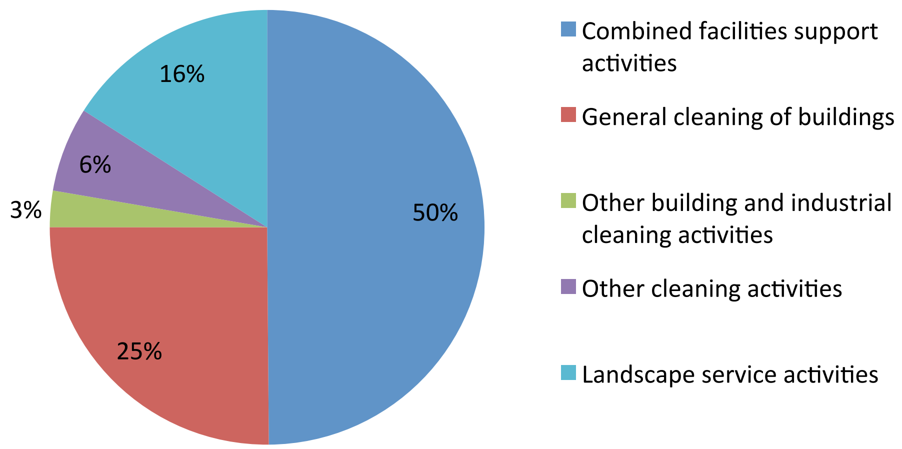
3.1 Sector GVA / Turnover

The industry contributed nearly £24.4bn to the economy in 2015. It provides a vital service to us all ensuring our workplaces, hospitals, schools, transport and public spaces are clean and pleasant to use.

Turnover has increased by 21% since 2010, greater than all economy growth in which turnover increase by 17%.

50% of the industry turnover was from combined facilities support services, while contracts for general cleaning of buildings contributed 25% (Figure 1).

Figure 1 Turnover by industry, 2015



Source: ONS Annual Business Survey - 2015 Provisional Results Release Date 10 November 2016

3.2 Businesses

3.2.1 Number & Size

Many firms now outsource cleaning and similar services, such as security or catering, to specialist firms as a way to reduce to costs. This has led to significant expansion in the industry. The industry has seen a year-on-year increase since 2011 when 30,900 firms were in operation, to today where more than 40,300 businesses operate.

In terms of growth there have been some significant differences across the nations and regions. In England business numbers increased by 34%, 26% in Scotland, 11% in Wales, while in Northern Ireland the number decreased by 17%. London saw an increase of 67%, with numbers rising from 3,010 to 5,035 between 2011 and 2016 (see annex Table 12).

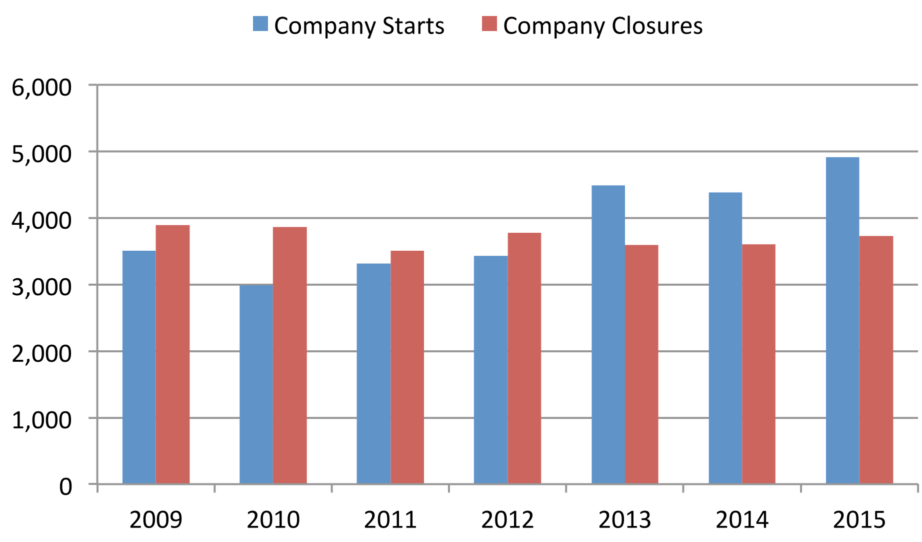
Nearly nine in ten (87%) are micro businesses, employing less than 10 individuals.

3.2.2 Start-ups and closures

The number of new business in the cleaning industry increased by 12% from 4,380 to 4,910 between 2014 and 2015. This was greater than all sectors in which the number of new businesses increased by 9%.

During the same period the number of businesses that ceased trading rose from 3,600 to 3,725 between 2014 and 2015: an increase of 3% but this was much lower than UK average of 9.4%.

Figure 2 Company start-ups and closures in the Industry, 2009-2015



Source: ONS Business Demography – 2015. Enterprise Births, Deaths and Survivals.

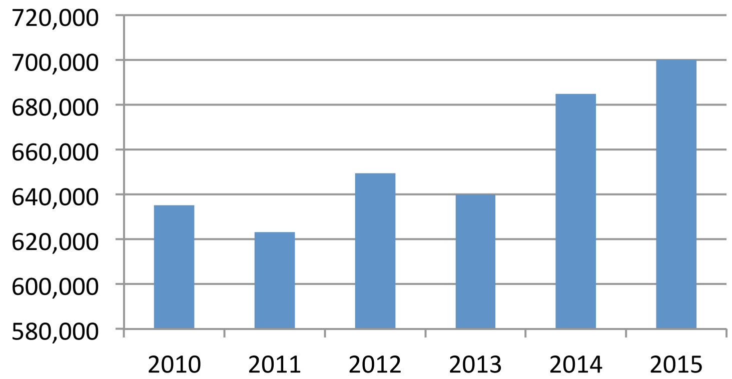
4 Workforce size and characteristics

4.1 Number employed

The industry employs 700,000 individuals across Great Britain.

Overall employment grew 10% between 2010 and 2015, greater than whole economy which recorded a 7% growth in employment.

Figure 3 Change in employment numbers 2010-2015



Source: ONS Business Register and Employment Survey 2015

However the industry employment growth rate has varied across the regions (see annex Table 17). The North East experienced greatest growth at 35% but Scotland and West Midlands saw numbers employed in the industry decrease by 5% and 11% respectively.

4.2 Regional employment

The South East and London account for the greatest share of employment, with 18% and 17% respectively, of the industry employed there.

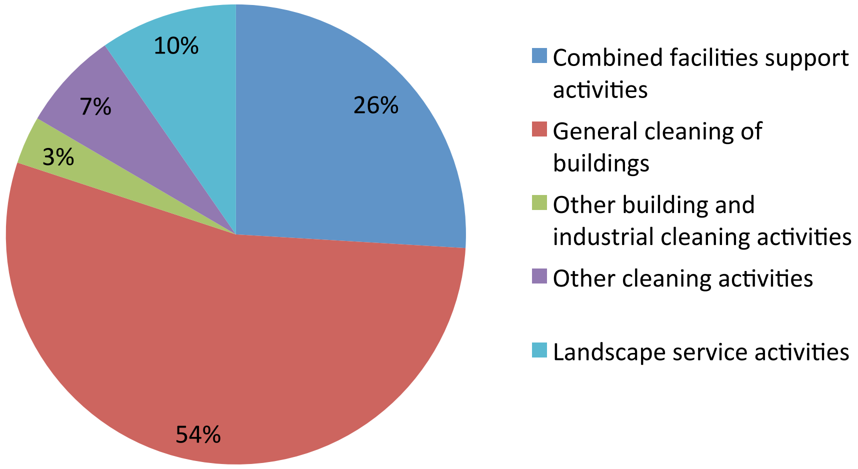
The North East and Northern Ireland have the lowest proportion of staff (2% and 4% respectively).

4.3 Employment by sub-industry

While combined facilities support activities accounts for 50% of the industry turnover, only 26% of the employment is within this sub-industry.

General cleaning of buildings sub-industry accounts for over half (54%) of all employment, with landscaping service activities accounting for a further 10%.

Figure 4 Employment by sub-industry



Source: ONS Business Register and Employment Survey 2015

4.4 Occupational breakdown

The majority (51%) of workers are employed in elementary roles. This is significantly higher than the proportion seen across all UK sectors. A further quarter (23%) are skilled traded personnel.

Table 1 Occupational profile of the cleaning industry and all UK sectors

	Cleaning Industry	All sectors
Managers and Senior Officials	6%	11%
Professional Occupations	2%	20%
Associate Professional and Technical Occupations	4%	14%
Administrative, Clerical and Secretarial Occupations	5%	13%
Skilled Trades Occupations	23%	11%
Personal Service Occupations	7%	9%
Sales and Customer Service Occupations	1%	8%
Transport and Machine Operatives	2%	6%
Elementary Occupations	51%	11%

Source: LFS April - June 2016

4.4.1 Key occupations

Given that 51% of the workforce falls within elementary occupations, it is of little surprise that cleaning operatives and domestics, window cleaners and industrial cleaning process occupations (all of which falls into the elementary occupations category) are all in the top five occupations. Gardeners and landscape gardeners (a skilled trade) account for a further 18% of the workforce.

Table 2 Largest occupational roles in the cleaning sector

Rank	Occupation	Number	% workforce
1	9233 Cleaning operatives and domestics	252,600	40%
2	5113 Gardeners and landscape gardeners	115,300	18%
3	6240 Cleaning and housekeeping managers and supervisors	28,200	4%
4	9231 Window cleaners	23,500	4%
5	9132 Industrial cleaning process occupations	11,500	2%
6	1251 Property, housing and estate managers	11,400	2%
7	4159 Other administrative occupations n.e.c.*	8,700	1%
8	9119 Fishing and other elementary agriculture occupations n.e.c.*	8,400	1%
9	1259 Managers and proprietors in other services n.e.c.*	7,700	1%
10	1131 Financial managers and directors	6,400	1%
	Other occupations	160,600	25%
	Total Workforce	634,000	

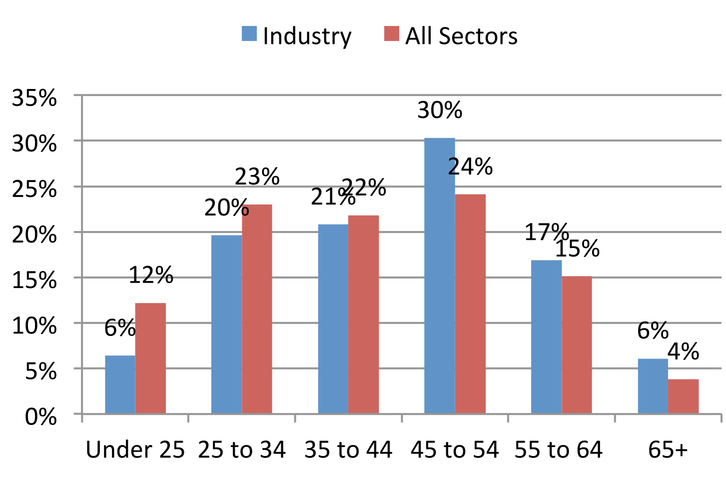
Source: LFS April - June 2016 (*n.e.c. = Not elsewhere classified)

4.5 Workforce Characteristics

The industry is made up of a wide range of individuals. Here we examine the workforce in more detail considering demographics such as age, gender and working status.

4.5.1 Age

Figure 5 Age profile of the cleaning industry



The vast majority of the workforce are aged between 25 and 54 (71%).

The proportion of staff under 25 in the Industry is much lower than seen across the economy (6% v 12%). In contrast the proportion of staff aged over 55 (23%) is higher (19%) suggesting that that the sector may face issues around an ageing workforce.

Source: LFS April - June 2016

4.5.2 Gender

Across the industry the gender of workers is evenly split – 51% are male and 49% female. However, when looking closely at the sub-industries there are noticeable differences.

Table 3 Gender of the Cleaning Industry workforce

SIC Code	Description	% Female	% Male
81.1	Combined facilities support activities	36%	64%
81.2	Cleaning Activities	66%	33%
81.21	General cleaning of buildings	73%	27%
81.22	Other building and industrial cleaning activities	20%	80%
81.29	Other cleaning activities	63%	37%
81.3	Landscape service activities	16%	84%

Source: LFS April - June 2016

There are also further differences in gender across occupational groups (Table 4).

The proportion of women working in elementary occupations is considerably higher in the cleaning industry compared to the whole economy (65% compared to 46%). Similarly women form a higher proportion of the industry's managers and senior officials than average (47% compared to 35%).

Women appear to be significantly underrepresented in skilled trade occupations and professional occupations within the industry.

Table 4 Occupational profile by gender of the cleaning industry

	Cleaning Industry		All sectors	
	% Male	% Female	% Male	% Female
Managers and Senior Officials	53%	47%	65%	35%
Professional Occupations	87%	13%	51%	49%
Associate Professional and Technical Occupations	54%	46%	56%	44%
Administrative, Clerical and Secretarial Occupations	32%	68%	24%	76%
Skilled Trades Occupations	86%	14%	90%	10%
Personal Service Occupations	45%	55%	17%	83%
Sales and Customer Service Occupations	*%	100%	38%	62%
Transport and Machine Operatives	78%	22%	88%	12%
Elementary Occupations	35%	65%	54%	46%

Source: LFS April - June 2016

Across the industry there are significant variations in the male/female split in particular roles with a polarisation across certain roles. For example 79% of cleaning operatives and domestic workers are female, but only 2% of window cleaners are (Office for National Statistics, et al., 2016). While 95% of those in industrial cleaning occupations are male and 84% of gardeners or landscape gardeners are also male.

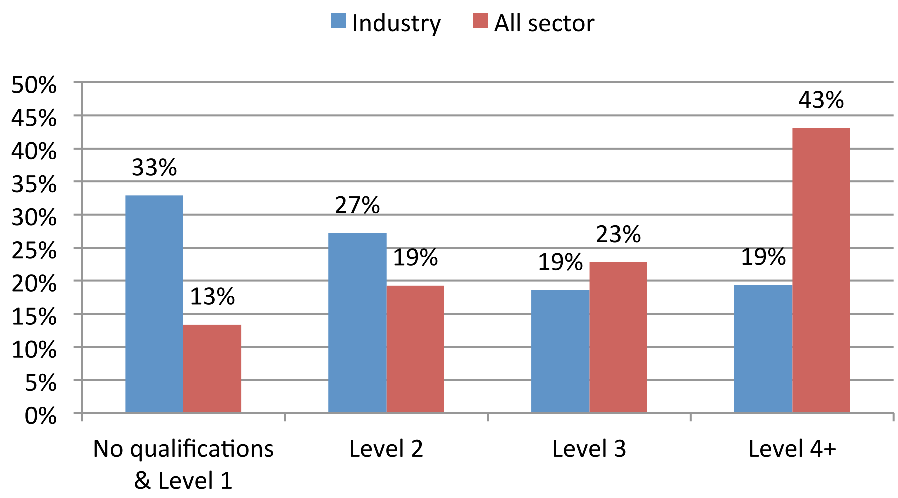
4.5.3 Qualification levels

Workers in the industry hold significantly lower levels of qualifications.

A third of the workforce do not hold a level 2 compared to just 13% across the economy. The industry also has significantly lower proportion holding level 4 qualifications (19% v 43%).

This reflective of the occupational profile, in which half of the workforce is within elementary positions, where skills requirements are not that complex.

Figure 6 Qualification levels



Source: LFS April - June 2016

4.5.4 Migrants

The number of foreign born people working in the industry accounts for 23% of the workforce. This is greater than all sector figure where 17% of the workforce are foreign born.

There is variation across the nations/regions. For example in London 68% of the cleaning staff were born overseas while in Wales 9% of the workforce were (see Annex Table 19).

Migrant workers report taking jobs in the industry because entry requirements are low and that their home qualifications are not always recognised in the UK (Equality and Human Rights Commission, 2014).

5 Working hours and pay in the Industry

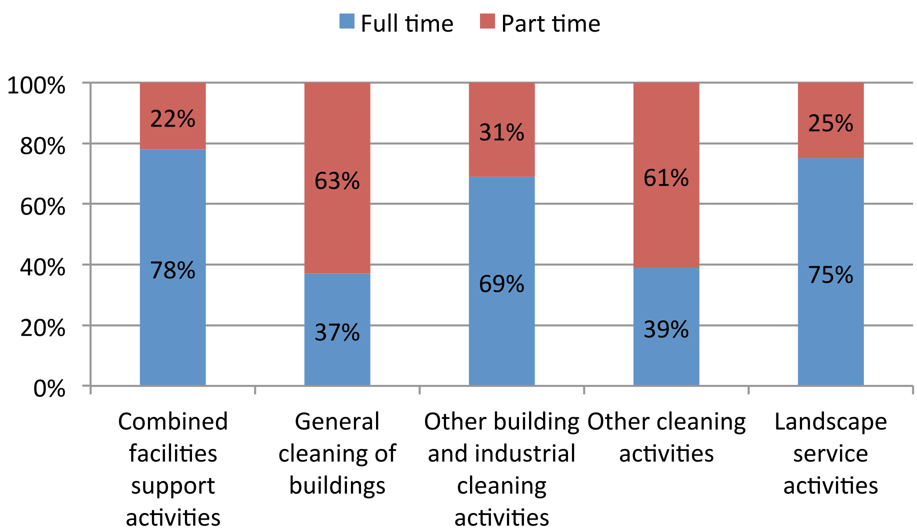
5.1 Flexible working

Many people may view the industry and cleaning in particular, as a low status job of little value. However, without the industry, workplaces and services would be unpleasant for other employees and customers.

Across the industry full-time workers account for 55% of the workforce. However there are notable differences across the sub-industries (Figure 7). General cleaning of buildings and other cleaning activities are dominated by part-time workers with two thirds reporting to work part-time.

The part-time working that the industry offers can be an advantage to many. For example the hours can enable individuals to balance a job with studying or a family or caring responsibilities.

Figure 7 Working patterns in the Industry



Source: LFS April - June 2016

5.2 Pay

The government wants to move away from a low wage, high tax, high welfare society to a higher wage, lower tax, lower welfare society (DfBEIS, 2016). The national minimum wage is one way in which they hope to achieve this. It does however, impact on firms in the sector in which staff costs accounts for a significant proportion of company resources.

The minimum wage a worker should at least be receiving depends on an individual's age or if they are an apprentice. The rates change every April and are currently set at:

	25 and over	21 to 24	18 to 20	Under 18	Apprentice
2016 rate	£7.20	£6.95	£5.55	£4.00	£3.40
April 2017	£7.50	£7.05	£5.60	£4.05	£3.50

The latest ONS data allows us to investigate the average pay and working hours by industry and occupation.

5.2.1 Pay by sub-industry

In April 2016 the average hourly wage for a full time worker in the industry was £10.60, up 6.4% from £9.96 in 2015. The industry experienced greater growth in wages than all sectors which only saw wages increase by 2.3% in the same period.

Table 5 Average hourly pay and pay range in the Industry, Full time workers (2016)

Industry	Average Pay	Annual % change	Pay Range
Combined facilities support activities	£13.19	7.3%	£7.89 – £18.89
Cleaning Activities	£8.69	3.1%	£7.20 – £12.31
General cleaning of buildings	£8.30	2.6%	£7.20 – £11.52
Other building and industrial cleaning activities	£9.98	6.6%	£7.67 - £10.40
Other cleaning activities	£9.73	-1.4%	£7.20 - £13.55
Landscape service activities	£9.48	7.0%	£7.25 - £12.46
Industry (81)	£10.60	6.4%	£7.23 - £20.48

Source: Annual Survey of Hours and Earnings 2016

5.2.2 Pay by occupation

The rates of pay between key occupations vary, as you would expect, according to seniority/position. For example, on average, full-time positions such as:

- Cleaning operatives are paid £7.80 per hour, working on average 37.5hrs. But salaries may range between £7.20 to £10.48.
- Street Cleaners are paid £9.03 per hour for a 37hr week. Range can be £8.29 to £10.21.
- Window Cleaners average is £8.00 per hour, working on average 40hrs.
- Industrial cleaning process occupations are paid on average £8.48 (range £7.20 to £9.64).
- Pest Control officers are paid on average £9.63 per hour.
- Cleaning supervisors average £8.83, but could range from £7.45 to £11.26 per hour.
- Waste disposal and environmental service managers received on average £18.11 per hour.

The Equaility and Human Rights Commission report (2014) found that cleaning firms do not believe that the lower rates of pay is likely to change much as the contract value determines their pay rates and they are constrained by what the client will pay. Furthermore competition at the bidding stage of procurment and renewal points means that profit margins on contracts are now narrow so there is limited flexibility.

6 Recruitment & Retention

Recruitment in the sector occurs through a mix of formal and informal methods. Large firms used formal routes such as the Jobcentre and adverts online and in local shops (Equality and Human Rights Commission, 2014). Others will take speculative job applications/CVs and contact applicants when vacancies arise.

Smaller firms tend to use informal recruitment methods such as word-of-mouth. However, the practice of recruitment based on word-of-mouth and recommendations made by existing staff could lead to discrimination. For example, if a workforce is drawn largely from one ethnic group, this practice could lead to continued exclusion of other ethnicities.

By advertising the role widely employers can select staff from a wider and more diverse pool of people.

6.1 Vacancies and impact

At a macro level, recruitment is an indicator of the health of the labour market and the economy in general. Vacancies can be a positive indicator of growth or present challenges if they signify a loss of key personnel or high levels of staff turnover.

When employers have vacancies, the labour market is either able to meet employer requirements (the most common scenario) or it is not. Where employers struggle to fill their vacancies, this may be due to a lack of skills, qualifications or experience amongst applicants. Collectively these are known as 'skill-shortage vacancies'. Vacancies can also prove 'hard-to-fill' for other, non-skills-related reasons. Such reasons principally include a lack of applicants for the role, issues with applicants' attitude, personality or motivation, or specific issues related to the job role (e.g. poor terms and conditions or unsociable hours) or the recruiting organisation (e.g. remote location or poor transport links).

The UKCES Employer Skills Survey provides insight into vacancies and skills shortages.

However please note that analysis presented here and in section 7 relates to the sector category 'Business Services'[1]. Key headline data reveals:

- Business Service sector had 197,500 vacancies, with 19% of firms reporting at least one vacancy; in line with UK findings.
- Vacancies as a percentage of employment (density) was 4.1% (greater than UK findings of 3.3%).
- A third (33%) of vacancies were considered to be hard-to-fill.
- 50,600 (26%) of vacancies were considered to be skill-shortage vacancies (SSV) (slightly greater than UK finding of 23%). The proportion vacancies classified as SSVs has increased in recent years – in 2011 it stood at 17%.
- 7% of firms in the sector report retention issues (UK findings was 8%).

[1] SIC codes 68 to 82 – includes Real Estate activities (68), Professional, scientific and technical activities (69-75), Administrative and support service activities (77-82)

The key technical or practical skills lacking among applicants in the sector included:

- Specialist skills or knowledge
- Solving complex problems
- Knowledge of products and services
- More complex numerical or statistical skills

The key people and personal skills lacking among applicants in the sector included:

- Ability to manage own time and prioritise own tasks
- Customer handling skills
- Team working
- Persuading or influencing others

Most common impacts of skill-shortage vacancies were:

- Increase workload for other staff
- Have difficulties meeting customer service objectives
- Lose business or orders to competitors

7 Internal Skills Challenge

The above section examined the extent to which firms encounter difficulties recruiting and holding onto staff.

This section explores the related issue of skills gaps within the workforce. This internal challenge arises when employees lack proficiency to fulfil their role. Such skills gaps can hinder an establishment's ability to function efficiently, thereby harming its productivity and profitability.

We then consider levels of staff training. Training staff in the workplace is widely recognised as a key means to improving skills and productivity thereby maintaining and improving competitiveness and stimulating economic growth.

7.1 Skill gaps, reason and impact

The majority of firms report having a fully proficient workforce. However, 12% of all firms in the sector report having skills gaps, with 5.2% of all workers not considered fully proficient in their role. (UK finding 14% of firms and 5% of employees).

The main causes of skills gaps in the sector are reported to be:

- Individual is new to the role
- Their training is currently only partially completed
- Staff lack motivation

The first two factors are both predominantly transient: that is to say one would expect skills gaps resulting from these causes to be eliminated once staff have settled into their new roles and/or existing training has been completed.

The skills lacking in the workforce mirror those that are found to be lacking in applicants (section 6.1): for example, people and personal skills, such as time management and team work and the specialist skills and knowledge need to perform the role were widely considered to lacking.

While the proportion of firm experiencing skills gaps has decreased since 2013 (from 13% to 12%), the impact of them is still significant, with 19% of firms reporting that skills gaps have a major impact on their business, 49% a minor impact and 33% no impact. Some of the implications of skills gaps include:

- Increased workload for other staff
- Having higher operating costs
- Having difficulties meeting quality standards

To overcome skills gaps employers in the sector undertook the following actions:

- Increase training activity
- More supervision
- Mentoring
- More appraisals

7.2 Investment in training

Above we have seen that increasing training activity was the most common employer response implemented to attempt to tackle skills gaps.

Two thirds (68%) of firms in the sector had arranged or funded some form of training in 2015 up from 67% in 2011. Similar proportions provided any-off-the job training (51%) as on-the-job training (53%).

Overall 60% of staff in the sector received training. This has increased since 2011 when only 52% received training.

In total the sector delivered 18.2m training days in 2015. That's the equivalent of 6.3 days per person trained or 3.8 days per employee. This is slightly below all sector where days per person trained was 6.8 and days per employee 4.2.

The sector spent £9.8bn on training in 2015. That equates to £3,420 per trainee or £2,060 per employee. This is greater than all sector where spend per trainee was £2,610 and per employee £1,640.

The most common type of training provided was job-specific, aimed at developing the skills of a particular occupation or job role. Employers also funded or arranged health and safety training, basic induction training for new staff and training related to new technology.

43% of firms would have liked to have provided more training but were unable to do so mainly as they lacked the funds or couldn't spare time for employees to be training.

7.3 Apprenticeships in sector

The government has made a clear commitment to delivering employer-led apprenticeship. Apprenticeships are full-time paid jobs which incorporate on and off the job training.

There are two different types of apprenticeship schemes, frameworks and standards. Apprenticeship frameworks are being progressively phased out and replaced by the newer apprenticeship standards. Both operate under different models of government funding.

Apprenticeship standards show what an apprentice will be doing and the skills required of them by job role. Standards are developed by employer groups known as 'trailblazers'.

Apprenticeship Frameworks

Currently available frameworks for the industry are:

Framework Title	Level
Higher Apprenticeship in Facilities Management level 4 and 5 (England)	4 and 5
Facilities Management (Wales)	2,3,4 and 5
Facilities Management (England)	2,3
Cleaning and Environmental Support Services (Wales)	2,3
Cleaning and Environmental Support Services (England)	2,3

Source http://www.afo.sscalliance.org/frameworks-library/index.cfm

Apprenticeship Standards

To date the industry has one apprenticeship standard published and approved for delivery[2] - Facilities Management Supervisor. Further standards are in development.

Framework Title	**Level**	**Status**
Facilities Management Supervisor	3	Standard Published
Facilities Manager		Standard in development
Senior / head of facilities management		Standard in development
Cleaning and support service operatives		Standard in development

7.3.1 Apprenticeship starts

In 2015/16 there were 4,320 starts on apprenticeship frameworks relating to the industry, down from 5,570 the year before (Table 6). The majority of starts (72%) related to cleaning and support services and 28% to facilities management.

In terms of age, very few under 25's started an apprenticeship in the industry: just 19% of industry starts were under 25 compared to 57% across all apprenticeships (DfE, et al., 2017).

[2] https://www.gov.uk/government/publications/apprenticeship-standard-facilities-management-supervisor

Table 6 Apprenticeship Programme Starts by Sector Framework/Pathway & Apprenticeship Standard

Sector Framework	**Apprenticeship Pathway**	**2013/14**	**2014/15**	**2015/16***
Cleaning and Support Service Industry	Cleaning and Support Services	2,550	3,310	
	Cleaning Supervision	50	90	
	Local Environmental Services	150	120	
	No Pathway Assignment	10	-	
	Total	*2,760*	*3,520*	*3,110*
Facilities Management	Facilities Management	310	310	
	Facilities Management (Building Services)	-	-	
	Facilities Management (Generic)	70	10	
	Facilities Services	1,270	1,730	
	No Pathway Assignment	-	-	
	Total	*1,650*	*2,050*	*1,210*
Total		**4,410**	**5,570**	**4,320**

Source (DfE, et al., 2017) * Pathway data not yet available

7.4 Associations and Professional Bodies

There are a number of associations and professional bodies that are working to improve the standards and qualifications in the industry. Many of these offer training and qualifications. Some of these are highlighted in the table below:

Table 7 Associations and Professional Bodies in the industry

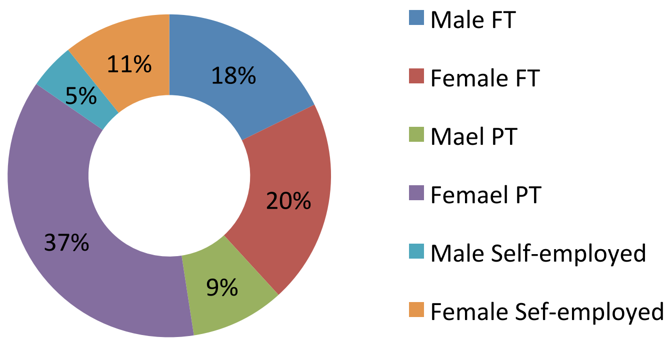
Organisation	Website
The Association of Building Cleaning Service Providers (ABCD)	http://www.abcdsp.org.uk/
Association Of Healthcare Cleaning Professionals	www.ahcp.co.uk/
The British Association for Chemical Specialties (BACS)	www.bacsnet.org
British Association For Cleaning In Higher Education (BACHE)	www.bache.org.uk
British Institute Of Cleaning Science (BICSc)	www.bics.org.uk
British Toilet Association	www.britloos.co.uk
The British Pest Control Association (BPCA)	www.bpca.org.uk
Chartered Institute Of Environmental Health (CIEH)	www.cieh.org
The Chartered Institution of Wastes Management (CIWM)	www.ciwm.co.uk
The Cleaning & Hygiene Suppliers' Association	www.chsa.co.uk
Cleaning And Support Services Association (CSSA)	http://www.cssa-uk.co.uk
The Domestic Cleaning Alliance	www.domesticcleaningalliance.co.uk
Federation Of Window Cleaners	www.f-w-c.co.uk
Industrial Cleaning Machine Manufacturers` Association (ICMMA)	www.cleaningmachines.org
Keep Britain Tidy	www.keepbritaintidy.org/
National Carpet Cleaners Association	www.ncca.co.uk
The National Association Of Wheeled Bin Washers	www.nawbw.co.uk
The UK Cleaning Products Industry Association	www.ukcpi.org
The United Kingdom Housekeepers Association	www.ukha.co.uk
Waste Management Industry Training & Advisory Board (WAMITAB)	www.wamitab.org.uk/
Worshipful Company Of Environmental Cleaners	www.environmental-cleaners.com
The Professional Body for Facilities Management (BIFM)	http://www.bifm.org.uk/bifm/

8 Future workforce projection

8.1 Industry Growth

Employment in the industry is expected to grow 9.5% between 2014 and 2024 – or by 84,000. This is greater than whole economy where growth of 5.5% is anticipated (UKCES, 2016).

Figure 8 Employment by gender and status, 2024



With an anticipated workforce of 968,000 in 2024, nearly half (46%) of the workers will be part-time.

38% will be full-time and 15% self-employed (Figure 8).

This is very similar to proportions seen in 2014.

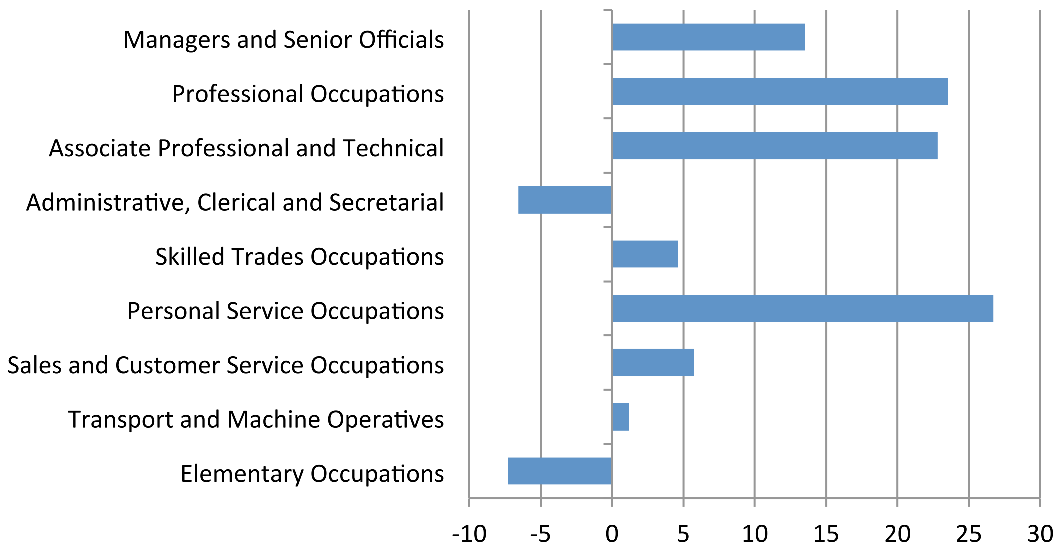
Source: UKCES Working Futures VI

Employment projections by occupation for the industry are shown below. This is clearly useful for people making careers decisions.

We expect to see large employment growth for higher level occupations, including managers, professional occupations and associate professionals and technical roles. Personal service occupations are projected to see the greatest growth (Figure 9).

But net job losses are projected for administrative and secretarial roles and elementary roles.

Figure 9 Occupation change, 2014 -2024 (000s)



Source: UKCES Working Futures VI

8.2 Replacement need and total demand

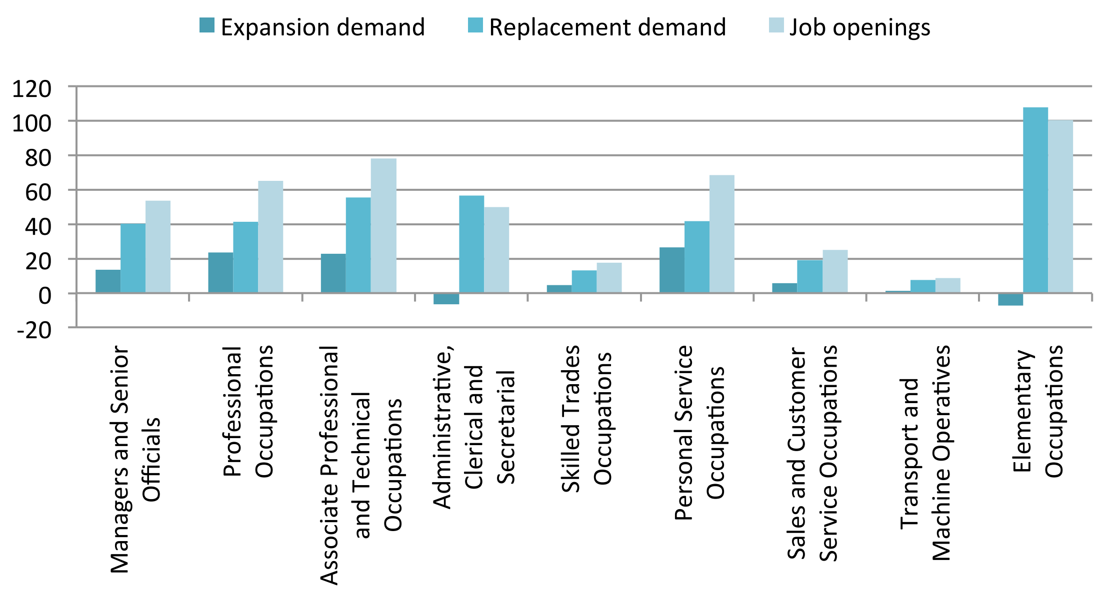
The above occupational change data is useful indicator of changing patterns of demand for skills. However, it also important to consider the replacement demands – the job openings created by the outflow of workers from the labour market.

Workers leave the labour market for a variety of permanent and temporary reasons, including retirement, family reasons (i.e. maternity/paternity leave) and mortality. These outflows have a significant influence on job opportunities across the labour market. Over the next decade, replacement demands are expected to generate nearly five times as many job openings in the cleaning industry compared to net job growth.

Occupations where employment is growing will need additional workers on top of those being replaced. While occupational groups forecast to see a net decline will still have job openings that need to be filled due to the replacement demand. Individuals need to consider this when making career choices but also employers need to be conscious of the need to replace key workers.

Overall the industry is expected to have 467,000 job openings between 2014 and 2024: 84,000 industry growth and 383,000 replacement demand. A fifth of all job openings will be within elementary occupations (Figure 10).

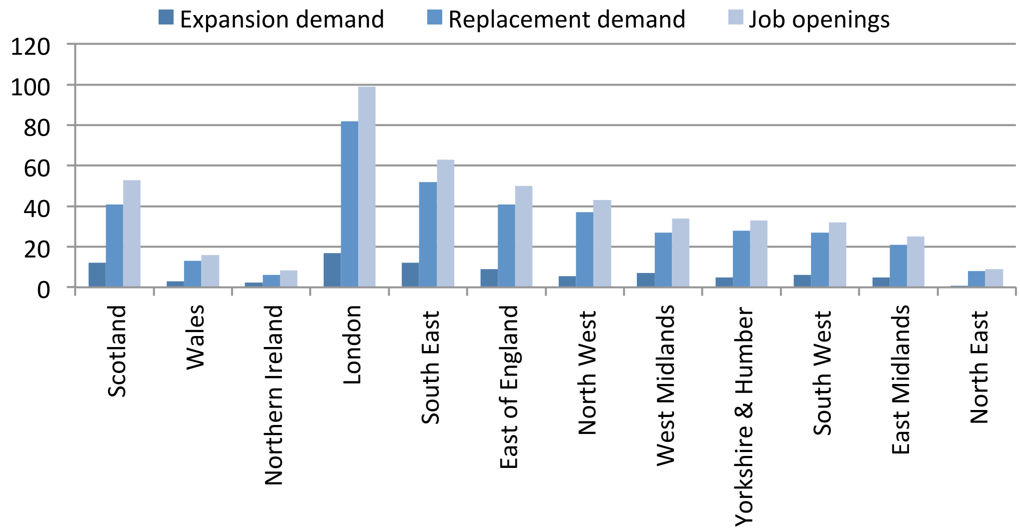
Figure 10 Job openings in the industry by occupation 2014 - 2024 (000s)



Source: UKCES Working Futures VI

Nearly 100,000 of the anticipated job openings will be across London and a further 63,000 in the South East (Figure 11). These are the two regions with the highest proportion of individuals in the sector.

Figure 11 Job openings in the industry by nation and region, 2014 - 2024 (000s)



Source: UKCES Working Futures VI

8.3 Qualifications

The latest Working Future projections also considers the qualification levels of the workforce. It shows that there will be a shift towards more people holding higher qualifications.

By 2024, 50% of people employed in the industry are expected to be qualified at level 4 and above, whilst the proportion of people with no formal qualifications is expected to fall to 4%.

Table 8 Change in qualification profile

	No qualifications and level 1	Level 2	Level 3	Level 4 – 6	Level 7 – 8
Qualification example	GSCE (grades D – G) BTEC level 1	GCSE (grades A* - C) NVQ Level 2	AS & A level BTEC National	Certificate of higher education (L4) Foundation degree (L5) Bachelor's degree (L6)	Master's degree (L7) Doctorate (L8)
2014 level **2024 level**	257,300 160,500	172,100 177,500	143,000 143,900	251,900 396,300	59,900 90,200
2014 – 2024 % change	-38%	3%	1%	57%	51%
2014 % share	29%	19%	16%	28%	7%
2024 % share	17%	18%	15%	41%	9%

Source: UKCES Working Futures VI

9 Drivers of change in the industry

9.1 Political and economic

A range of political and economic drivers at both national and international level have and will continue to have an impact on the industry.

Brexit

Brexit is something that has dominated the news agenda in the UK since the result of the referendum. However, as things stand it is difficult to see what sort of Brexit we will have.

Whilst there are voices suggesting that Brexit might actually not happen (President Macron of France has also spoken of this as a possibility and the Liberal Democrats remain opposed to Brexit, advocating a second referendum on the basis of the negotiated exit position), it seems likely that the UK will in fact leave the European Union. At the GE2017, the Conservative and Labour parties both stood on a position that they would exit the EU because of the result of the 2016 referendum. Where there was difference between the two major parties was over the sort of exit they would seek to secure.

In the run up to the 2017 General Election when a large Conservative victory seemed likely, it was assumed that the UK was about to begin some form of 'hard' Brexit. Despite being rarely defined, it was expected that this would be a Brexit based on leaving all EU institutions and associated agreements with the UK then negotiating our own agreements at a national level.

However, following the surprise result in June 2017, it now seems likely that whilst Brexit will happen, it may be at the 'softer' end, opening up the possibilities of effectively paying for access to various parts of the EU institutions/agreements – including access to the Single Market.

This uncertainty is a significant challenge. We simply do not know what will be the outcome of the Brexit negotiations, so employers have only best guesses on key issues such as free movement of labour, tariff free trade, legislative requirements etc. This lack of information is clearly unhelpful for making decisions over long term investments.

What is clear is that the international markets have already reacted to the uncertainty and how they perceive the negotiations to conclude. Sterling has come under significant pressure against all other major currencies in recent months. Consequently, imports are more expensive and this has had an effect on inflation, which of course is normally a driver behind interest rate rises.

Whatever happens, we can clearly say that uncertainty is not helpful for UK employers, particularly those (but not exclusively) who have international supply chains. Following the negotiations employers will be able to adapt and live in the new world. However, we are currently in something of a phoney war, where employers and individuals are trying to make serious decisions based on partial knowledge of an incomplete picture.

Labour availability

Following the recession, the economic situation across Great Britain has been improving. Unemployment rates in the area have declined from a high of 8.4% in 2011 to 4.6% at the start of 2017. However, of those claiming JSA, 47% have been out of work for six months or more (ONS, 2017) and are therefore more of a challenge to get back into work. Consequently it's becoming harder to recruit.

Demographic changes mean that there are fewer younger people entering the job market, which has a proportionally adverse effect on the subsector as it employs a greater proportion of 16-24 than found across the economy as a whole. So employers need to find ways to retain staff.

Minimum Wage

The National Minimum Wage (NMW) was first introduced in the UK in April 1999 at a rate of £3.60 per hour for over 21-year-olds. Prior to that there was no statutory minimum. In April 2016 the government introduced the National Living Wage (NLW) at a level of £7.20 per hour for those over 25 years old, increasing to £7.50 in April 2017. It is expected to rise to at least £9 per hour by 2020. These rises for example will have an impact on employers - cleaning is a highly labour-intensive service where labour accounts for around 85% of costs (EFCI, 2016).

9.2 Environmental

Green / Environmental methods

With environmental and health concerns for workers, firms are looking at ways to be greener - i.e. cleaning without chemicals, for example microfiber cloths and mops, which require only water to remove germs, grime and bacteria or using steam vapour systems, or spray and vac systems using pressurised water to clean products and/or conveyor belts[3].

9.3 Social

The reach of the cleaning industry is huge and is expected to continue to grow but there are challenges in procuring services.

Contracting

The tendency for cleaning work to be contracted out, with tenders considered on the basis of price alone, means that there are strong cost-cutting pressures on cleaning companies. This can result in inadequate investment in training and other management activities essential for worker protection.

[3] https://www.iwc-international.com/

As labour costs tend to make up the largest part of the costs of a cleaning company, there is a risk that unscrupulous employers will seek to gain an unfair advantage in tendering processes by illegal employment practices such as not paying full social insurance costs or employing illegal labour.

Action against such practices is being taken. For example, European social partners in the industrial cleaning sector have adopted a common position on employment and have published *Selecting Best Value* to promote quality in tendering (EFCI, 2016).

Perception

The public perception of workers in the cleaning industry is that they are unskilled, uneducated and unintelligent. The thought is that because you get your hands dirty, cleaning is a “dirty” job. Far too often the public overlook the work done in the cleaning department keeps building occupants safe and healthy.

Some elements of non-domestic cleaning work are fairly standard, but others involve specialised procedures. Consequently the workforce and the roles can be very diverse. This needs to be promoted to the public and individuals seeking to work in the sector.

Fairness, dignity and respect are values we all share. Yet a lack of dignity and respect is an underlying theme reported by cleaning operatives in recent research (Equality and Human Rights Commission, 2014). It was often reported in the context of individuals and their work not being valued, and people not shown the same courtesy and consideration given to others. Valuing your workforce can help to retain staff.

9.4 Technological

With ever increasing competition and pressure on margins, firms continue to look to technological advancements to seek time and cost efficiencies. The cleaning industry is no exception.

New, sophisticated technology and equipment is changing the industry. The technology landscape almost seems to change with each passing day, and it’s impossible to guess the technologies that will be driving the cleaning sector ten or twenty years down the line, but below highlights some of the advances.

Maximising security

Security and safety of individuals in many buildings, such as commercial properties, schools or hospitals is of paramount importance. When hiring contract cleaning operatives, it is essential that all staff have undergone a stringent vetting process to ensure that they not only have a legal right to work in the UK, but are also safe to work with children and vulnerable people where necessary.

Security identity technologies can help to combat illegal working and safeguard the security of clients, their buildings and intellectual properties. Checks can be done with the Children's Barred List Check and DBS (Disclosure and Barring Service), but also the use of Machine Readable Zone (MRZ) passport readers can authenticate IDs.

Biometric Time & Attendance

On-site biometric time and attendance monitoring technologies can further ensure security. Biometric technology recognises physical characteristics of a person, such as facial measurements or a fingerprint pattern (which are entirely unique for every person), to identify individuals securely. Thereby at arrival on a biometrically monitored establishment, the staff member will scan a fingerprint for example. This ensures that only those authorised to deliver cleaning services are able to do so. As well as being an identification tool, it can also monitor attendance.

Remote Monitoring of equipment

Equipment maintenance is a further area in which technology can have a positive influence on service cost and efficiency. For example scrubber dryers can easily be remotely monitored, via Wi-Fi, to assess their maintenance needs – or to spread usage between multiple pieces of equipment. This removes one of the most inconvenient elements of maintenance – the cost of downtime when a machine is out of use.

Furthermore such technology could indirectly improve staff satisfaction and staff retention. Giving people access to leading edge technology, similar to better working conditions, can make them feel better about their job, and in turn increases the likelihood that they'll go the extra mile for their clients.

Robotics / Smart Cleaning Equipment

In large warehouse complexes as well as other industrial, commercial and public use premises, such as airports, trade fairs and hospitals, there are huge floor surfaces that have to be cleaned daily or even several times during the day. Cleaning those surfaces is time demanding and requires human effort, in terms of repetitive actions.

Thereby, cleaning equipment manufacturers are investing in the research and development of robotic floor cleaning equipment and are actively engaged in developing formal safety standards and guidance at a UK and European level (ICMMA, 2017).

Currently the market take up is small, approx. 1%, but the potential opportunity is large. There is collective work to be done with particular reference to the proximity of vulnerable people and children, whether robots should be collaborative or isolated, the level of supervision or unattended programmes and the definition of the operating area. The correct understanding of potential liability, liability cover, education in technology, cost/benefit analysis and operator skills in the new world; will enable the correct introduction and adoption of the robotic cleaners.

FLOBOT is being developed by a multi-disciplinary team, including the University of Lincoln, which specialises in the software required to operate the robot.

A professional, robotic scrubber-dryer (floor washer with brushes and suction to dry the floor) for large areas, the system consists of a mobile robotic platform (the floor washing robot) and a docking station for automatically refilling the robot’s water tank, emptying the dirty water tank and recharging the battery. FLOBOT uses advanced software modules for navigation and mapping, human tracking for safety, floor cleanliness level estimation, mission programming and connection to the logistics management system of the end-users.

A first operational prototype has now been developed.

The project team is keen to ensure that the technology transfers out of academia and into industry and ICMMA, the Industrial Cleaning Machinery Manufacturers Association, has been invited to participate in the FLOBOT project's Business Interest Group.

http://www.flobot.eu/about/

Another example of technology advancement is window-cleaning drones that are being developed. This could transform this time-consuming and onerous task. Like the driverless car, the technology still has a way to go, but it's inevitable that a fully-operational model will be with us sooner rather than later. And in this case, the benefits go way beyond freeing up people – there’s also the added safety benefit when working at height.

10 Annex: Data tables

10.1 Industry classification

Table 9 Standard Industrial Classification for Services to Buildings and Landscape Activities

SIC Code	Description
81.1	**Combined facilities support activities**
81.2	**Cleaning Activities**
81.21	General cleaning of buildings
81.22	Other building and industrial cleaning activities
81.22/1	Window cleaning services
81.22/2	Specialised cleaning services
81.22/3	Furnace and chimney cleaning services
81.22/9	Building and industrial cleaning activities (other than window cleaning, specialised cleaning and furnace and chimney cleaning services) n.e.c.
81.29	Other cleaning activities
81.29/1	Disinfecting and extermination services
81.29/9	Cleaning services (other than disinfecting and extermination services) n.e.c.
81.3	**Landscape service activities**

Source: UK SIC Main Volume[4]

10.2 Turnover

Table 10 Turnover (£ million)

SIC Code	Description	2010	2011	2012	2013	2014	2015	%
81.1	Combined facilities support activities	9,853	9,272	10,285	11,034	11,199	12,160	50%
81.2	Cleaning Activities	7,312	7,860	7,697	7,528	8,276	8,325	34%
81.21	*General cleaning of buildings*	*5,000*	*5,614*	*5,603*	*5,526*	*5,972*	*6,127*	*25%*
81.22	*Other building and industrial cleaning activities*	*766*	*744*	*745*	*745*	*869*	*659*	*3%*
81.29	*Other cleaning activities*	*1,545*	*1,502*	*1,350*	*1,257*	*1,435*	*1,539*	*6%*
81.3	Landscape service activities	3,015	3,403	3,461	3,593	3,540	3,895	16%
Total		**20,180**	**20,535**	**21,444**	**22,155**	**23,016**	**24,379**	**100%**

Source: ONS Annual Business Survey - 2015 Provisional Results Release Date 10 November 2016

[4] http://webarchive.nationalarchives.gov.uk/20160105160709/http://www.ons.gov.uk/ons/guide-method/classifications/current-standard-classifications/standard-industrial-classification/sic2007---explanatory-notes.pdf

10.3 Business

Table 11 Businesses in Cleaning Industry, 2010-2016

SIC Code	Description	2010	2011	2012	2013	2014	2015	2016	%
81.1	Combined facilities support activities	1,350	1,675	2,050	2,210	2,375	2,630	2,890	7%
81.2	Cleaning Activities	14,075	13,400	14,275	14,330	15,240	18,775	19,460	48%
81.21	*General cleaning of buildings*	*9,020*	*8,305*	*8,480*	*8,165*	*8,780*	*11,095*	*11,390*	*28%*
81.22	*Other building and industrial cleaning activities*	*2,175*	*2,265*	*2,480*	*2,630*	*2,650*	*3,120*	*3,170*	*8%*
81.29	*Other cleaning activities*	*2,875*	*2,830*	*3,315*	*3,535*	*3,805*	*4,565*	*4,900*	*12%*
81.3	Landscape service activities	16,335	15,815	16,005	15,810	15,820	17,700	18,000	45%
Total		31,760	30,895	32,330	32,350	33,435	39,105	40,345	100%

Source: NOMIS: ONS UK Business Count – Enterprise

Table 12 Businesses in Cleaning Industry by nation and region, 2010-2016

Area	2010	2011	2012	2013	2014	2015	2016	% 2011 to 2016
UK	31,760	30,895	32,330	32,350	33,435	39,105	40,345	31%
England	26,265	25,530	26,860	26,985	28,115	33,040	34,300	34%
Scotland	2,475	2,445	2,525	2,510	2,550	3,040	3,090	26%
Wales	1,970	1,910	1,940	1,900	1,880	2,135	2,120	11%
Northern Ireland	1,050	1,005	1,005	955	890	885	835	-17%
East of England	3,660	3,555	3,685	3,655	3,725	4,330	4,450	25%
East Midlands	2,255	2,160	2,220	2,195	2,245	2,620	2,750	27%
London	3,075	3,010	3,460	3,695	4,110	4,740	5,035	67%
North East	780	785	815	810	860	1,080	1,100	40%
North West	2,925	2,835	2,980	2,965	3,100	3,710	3,810	34%
South East	5,280	5,160	5,495	5,495	5,695	6,795	7,120	38%
South West	3,545	3,425	3,455	3,430	3,500	4,150	4,235	24%
West Midlands	2,670	2,555	2,630	2,595	2,680	3,055	3,125	22%
Yorkshire & Humber	2,075	2,050	2,120	2,150	2,195	2,565	2,670	30%

Source: NOMIS: ONS UK Business Count – Enterprise

Table 13 Businesses by size (2016)

		Micro		Small	Medium		Large	
SIC Code	**Description**	**0 to 4**	**5 to 9**	**10 to 49**	**50 to 99**	**100 to 249**	**250+**	**Total**
81.1	Combined facilities support activities	2,260	255	240	35	40	60	2,890
		78%	9%	8%	1%	1%	2%	
81.2	Cleaning Activities	12,125	3,405	3,005	430	285	215	19,465
		62%	17%	15%	2%	1%	1%	
81.3	Landscape service activities	15,440	1,665	820	50	15	10	18,000
		86%	9%	5%	*	*	*	
Total		**29,825**	**5,325**	**4,065**	**510**	**335**	**285**	**40,345**
		74%	**13%**	**10%**	**1%**	**1%**	**1%**	

Source: NOMIS: ONS UK Business Count – Enterprise

Table 14 Count of births of new enterprises for 2009 to 2015

SIC Code	Description	2010	2011	2012	2013	2014	2015
81.1	Combined facilities support activities	490	525	650	565	590	525
81.2	Cleaning Activities	1,965	1,480	1,795	1,885	2,620	2,685
81.3	Landscape service activities	1,055	985	870	980	1,280	1,170
Total		3,510	2,990	3,315	3,430	4,490	4,380

Source: ONS Business Demography – 2015. Enterprise Births, Deaths and Survivals. Table 1.2

Table 15 Count of deaths of enterprises for 2009 to 2015

SIC Code	Description	2010	2011	2012	2013	2014	2015
81.1	Combined facilities support activities	240	205	290	330	310	305
81.2	Cleaning Activities	2,265	2,270	1,965	2,105	2,010	2,025
81.3	Landscape service activities	1,390	1,390	1,250	1,340	1,275	1,270
Total		3,895	3,865	3,505	3,775	3,595	3,600

Source: ONS Business Demography – 2015. Enterprise Births, Deaths and Survivals. Table 2.2

10.4 Employment

Table 16 Employment (GB)

SIC Code	Description	2010	2011	2012	2013	2014	2015	%
81.1	Combined facilities support activities	118,500	122,500	142,000	153,000	164,000	181,500	26%
81.2	Cleaning Activities	450,500	436,000	456,500	424,500	461,000	450,500	64%
81.21	General cleaning of buildings	401,000	383,000	393,500	361,500	388,500	378,500	54%
81.22	Other building and industrial cleaning activities	15,500	17,500	21,500	22,500	25,000	23,500	3%
81.29	Other cleaning activities	34,000	35,500	41,500	40,500	47,500	48,500	7%
81.3	Landscape service activities	66,500	65,000	51,500	62,500	60,500	67,500	10%
Total		635,500	623,000	649,500	640,000	685,000	700,000	100%

Source: ONS Business Register and Employment Survey 2015

Table 17 Employment by nation / region (GB)

Nation / Region	2010	2015	Growth
Scotland	72,000	68,000	-5%
Wales	20,500	22,500	8%
East	69,000	84,000	21%
East Midlands	26,500	34,500	30%
London	128,000	148,000	16%
North East	16,500	22,000	35%
North West	70,500	72,500	3%
South East	95,500	100,500	5%
South West	40,500	45,500	13%
West Midlands	57,000	51,000	-11%
Yorkshire and The Humber	39,000	51,000	31%
Great Britain Total	635,500	700,000	10%

Source: ONS Business Register and Employment Survey 2015

10.5 Workforce characteristics

Table 18 key job roles in the main occupational groups.

Occupational Group	Example Job roles
Managers and Senior Officials	Property, housing and estate managers Waste disposal and environmental services managers
Administrative, Clerical and Secretarial Occupations	Administrative roles Office manager
Skilled Trades Occupations	Gardeners and landscape gardeners Groundsmen and greenkeepers
Personal Service Occupations	Cleaning and housekeeping managers and supervisors Caretakers Pest control officers
Elementary Occupations	Cleaning operatives and domestics Window cleaners Industrial cleaning process occupations Street cleaners

Table 19 Proportion of workforce who are foreign born

Nation / Region	Industry	All sector
Scotland	10%	10%
Wales	9%	7%
Norther Ireland	16%	11%
East	12%	15%
East Midlands	12%	14%
London	68%	41%
North East	13%	7%
North West	18%	11%
South East	17%	16%
South West	19%	11%
West Midlands	12%	14%
Yorkshire and The Humber	12%	11%

Source: LFS April - June 2016

10.6 Pay

Table 20 Pay and working averages of key occupations

Occupation	Part time workers			Full time workers		
	Average Pay	Annual % Change (pay)	Average hrs worked	Average Pay	Annual % Change (pay)	Average hrs worked
1251 'Property, housing and estate managers'	£14.04	6.6%	20.0	£16.86	0.4%	37.4
1255 'Waste disposal and environmental services managers'	*	*	*	£18.11	7.2%	37.4
5113 'Gardeners and landscape gardeners'	£8.58	6.3%	18.6	£9.65	2.3%	37.8
5114 'Groundsmen and greenkeepers'	£7.83	3.9%	17.1	£9.19	2.1%	39.0
6132 'Pest control officers'	*	*	*	£9.63	-4.5%	38.0
6240 'Cleaning and housekeeping managers and supervisors'	£8.12	6.4%	20.0	£8.83	0.0%	38.0
9132 'Industrial cleaning process occupations'	£7.21	2.6%	*	£8.48	6.1%	39.0
9231 'Window cleaners'	£7.35	2.2%	22.5	£8.00	-5.6%	40.0
9232 'Street cleaners'	£7.53	13.1%	13.3	£9.03	1.2%	37.0
9233 'Cleaning operatives and domestics'	£7.47	6.6%	14.5	£7.80	4.7%	37.5
9235 'Refuse and salvage occupations'	£8.15	18.0%	18.4	£9.50	3.4%	37.0

* No data available Source: Annual Survey of Hours and Earnings 2016

10.7 Future requirement

Table 21 Employment projections and replacement demand for Cleaning Industry, 2014 -2024 (000s)

	2014 employment	2024 employment	Employment Change	Employment Change (%)	Replacement demand	Total requirement
UK	884	968	84	9.5	383	467
GB	870	952	82	9.4	377	459
England	747	814	67	9.0	323	390
Northern Ireland	14	16	2	15.9	6	8
Scotland	93	105	12	13.4	41	53
Wales	31	34	3	8.5	13	16
East of England	94	103	9	9.8	41	50
East Midlands	47	51	5	10.2	21	25
London	192	209	17	8.8	82	99
North East	19	19	1	4.6	8	9
North West	89	94	6	6.2	37	43
South East	119	131	12	9.8	52	63
South West	62	67	6	8.9	27	32
West Midlands	62	69	7	11.8	27	34
Yorkshire & Humber	64	69	5	8.2	28	33

Source: UKCES Working Futures VI

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