BRITISH CLEANING COUNCIL

THE CLEANING AND SUPPORT SERVICES INDUSTRY

RESEARCH REPORT

2019

BRITISH CLEANING COUNCIL

bcc

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BRITISH CLEANING COUNCIL
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Established 1989
abca
Association of Building Cleaning
Direct Service Providers

DOCERE
PURGARE
BICSc
THE BRITISH INSTITUTE OF CLEANING SCIENCE

BPCA
British Pest
Control
Association

The
Business Services
Association

CIWM

CSSA
CLEANING & SUPPORT SERVICES ASSOCIATION

DCA
Domestic
Cleaning
Alliance

NCCA
NATIONAL CARPET CLEANERS ASSOCIATION
CLEANING THE NATION'S CARPETS AND UPHOLSTERY

ukcpi
UK Cleaning Products Industry Association

UKHA
UK HOUSEKEEPERS
ASSOCIATION

ahcp
committed to excellence

bache
british association of cleaning in higher education

BACS
British Association for Chemical Specialities

BTA
British Toilet Association
For your convenience

chsa
cleaning & hygiene
suppliers association
www.chsa.co.uk

Chartered
Institute of
Environmental
Health

FEDERATION OF WINDOW CLEANERS
FWC

ICMMA
Industrial Cleaning Machine
Manufacturers' Association

KEEP
BRITAIN
TIDY.

wamitab

The National Association of Wheeled Bin Washers

Worshipful Company of
Environmental Cleaners

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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.
- The industry has four key sub-industries:
  - Cleaning activities.
  - Facilities management.
  - Landscape service activities.
  - Waste and resource management.
- The industry contributed over £49.9bn to the economy in 2016. 51% of the industry turnover was from facilities management, while waste and resource management contributed 24% and cleaning activities 16%.
- With more firms outsourcing contracts, there has been a significant growth in the industry. In 2010, 45,970 firms operated in the industry, but this now stands at more than 63,490 in 2018: an increase of 38%.
- 914,000 individuals work in the industry. London and the South East accounts for the greatest share of employment with 16% and 15% of the industry employed there respectively.
- There is a high proportion of positions in the industry classed as elementary (44%). 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 activities is dominated by female workers (64%), while landscape service activities and waste and resource management comprise mostly of male workers (87% and 88% respectively).
- Nearly a fifth (19%) of the industry workforce are foreign born. However, in cleaning activities, this increases to 28%.
- The part-time working opportunities the industry offers can be an advantage to many.
- The pay rates between key occupations vary according to seniority and position.
- 54% of all vacancies advertised in the industry were for elementary roles.
- The majority of the workforce is considered to fully proficient. But 12% of firms do report having skills gaps. 21% of establishments with skills gaps reported these as having a major impact on their organisation's performance.
- 60% of firms in the industry had arranged or funded some form of training in 2017, with 57% of staff receiving training. However, this is lower than the UK all sector findings of 66% and 62% respectively.
- Growth in the industry is expected to continue, with a shift towards people holding higher qualifications.
- There are a range of opportunities and challenges in the sector.

2 Introduction

2.1 British Cleaning Council

The British Cleaning Council (BCC) 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 over 20 members, which cover every facet of the multi-million-pound UK cleaning industry. From contract cleaning to waste management, pest control to housekeeping, training providers to machine manufacturers, chemical suppliers to wheelie-bin washers – the BCC coordinates, campaigns and supports the affairs of the whole of the UK's cleaning industry.

2.2 Cleaning Industry

This report builds upon the 2017 document (BCC 2017). It has been expanded in scope to include details on the management of waste and resources.

The cleaning industry has been defined using the set of Standard Industry Classification (SIC) Codes listed in the table below.

Table 1 Cleaning industry definition

Sub Industry	SIC	Definition
Cleaning Activities	81.21	General cleaning of buildings
	81.22	Other building and industrial cleaning activities
	81.29	Other cleaning activities
Facilities Management	68.32*	Management of real estate on a fee or contract basis
	77.33*	Renting and leasing of office machinery and equipment
	81.10	Combined facilities support activities
Landscape Service Activities	81.30	Landscape service activities
Waste and Resource Management Industry	38.11*	Collection of non-hazardous waste
	38.12*	Collection of hazardous waste
	38.21*	Treatment and disposal of non-hazardous waste
	38.22*	Treatment and disposal of hazardous waste

Source Standard Industry Classification 2017 (ONS 2009) *New SIC codes for the 2018/19 report

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

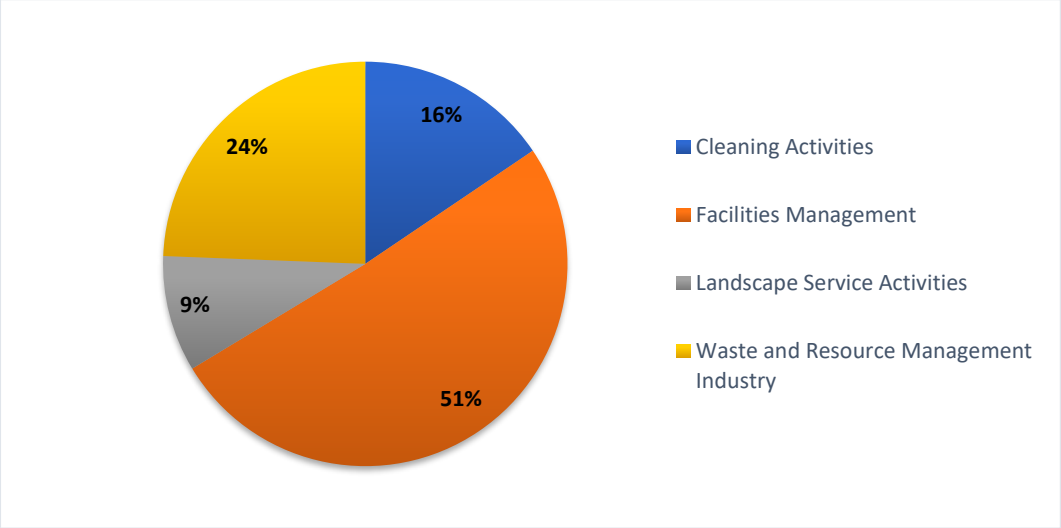
3.1 Sector turnover

The industry contributed over £49.9bn to the economy in 2016. 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 34% since 2010, greater than all economy growth in which turnover increase by 15% (ONS 2018).

51% of the industry turnover was from facilities management, while waste and resource management contributed 24%, cleaning activities 16% and landscape services 9% (Figure 1).

Figure 1 Turnover by subindustry



Source Annual Business Survey - 2016 Revised Results (ONS 2018)

3.2 Businesses

3.2.1 Number and 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 2010 when 45,970 firms were in operation, to today where more than 63,490 businesses operate (ONS 2018).

In terms of growth there have been some significant differences across the nations and regions. In England business numbers increased by 42%, 28% in Scotland, 10% in Wales, while in Northern Ireland the number decreased by 3%. London saw an increase of 73%, with numbers rising from 6,440 to 11,130 between 2010 and 2018 (see annex Table 22).

Nearly nine in ten (88%) are micro businesses, employing less than 10 individuals. 99% of businesses are private firms (see annex Table 23 and Table 24).

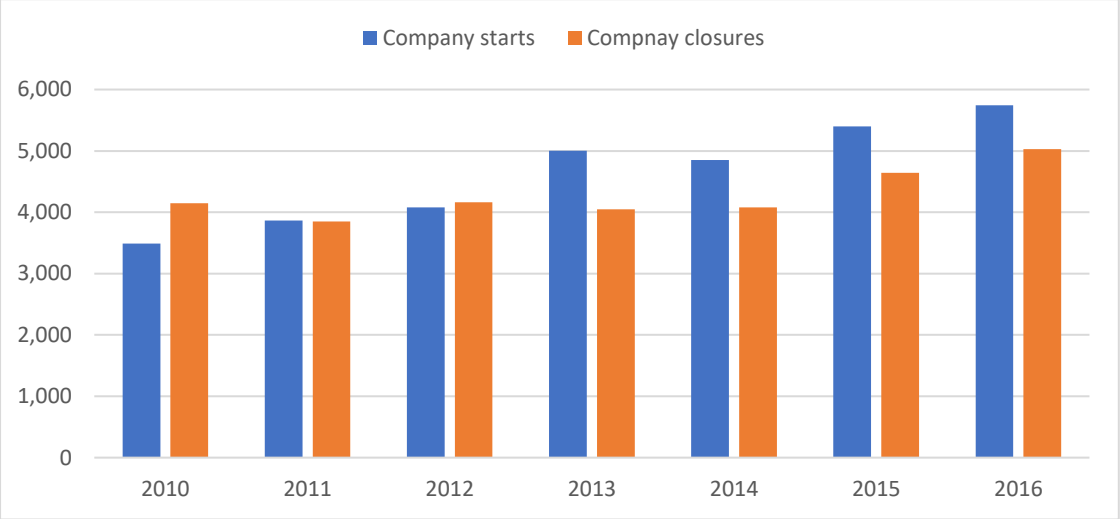
3.2.2 Start-ups, closures and survival rates

The number of new business in the cleaning industry increased by 6% from 5,400 to 5,745 between 2015 and 2016. This was less than all sectors in which the number of new businesses increased by 8% (ONS 2017).

During the same period the number of businesses that ceased trading rose from 4,640 to 5,030 between 2015 and 2016: an increase of 8% but this was much lower than UK average of 16%.

The cleaning industry five-year survival rate for businesses born in 2011 and still active in 2016 was 33%. This is lower than the UK whole economy rate of 44% (ONS 2017).

Figure 2 Company start-ups and closures in the industry, 2010 - 2016



Source Business Demography - 2016 Enterprise Births, Deaths and Survivals (ONS 2017)

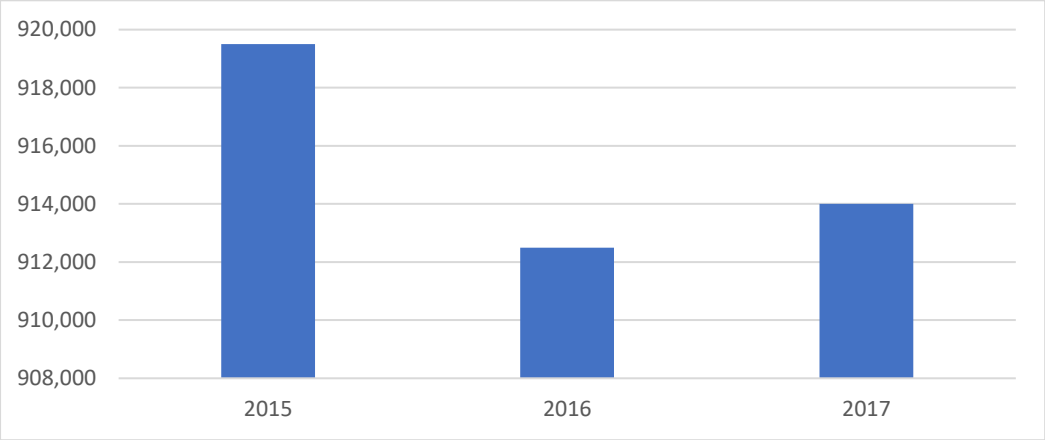
4 Workforce size and characteristics

4.1 Number employed

The industry employs over 914,000 individuals across Great Britain.

Overall employment has decreased 1% between 2015 and 2017. This contrasts with the whole economy which recorded a 3% growth in employment.

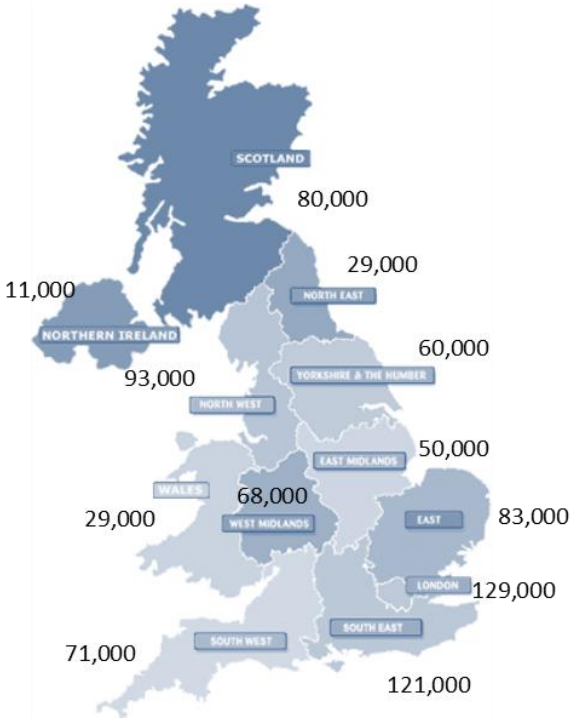
Figure 3 Change in employment numbers, 2015-2017



Source Business and Employment Survey (ONS 2018)

However, industry employment growth rate has varied across the regions (see annex Table 29). The West Midlands experienced greatest growth at 27% but East Midlands and London both saw numbers employed in the industry decrease by 16% and 13% respectively.

4.2 Regional employment



London and the South East account for the greatest share of employment, with 16% and 15% respectively, of the industry employed there.

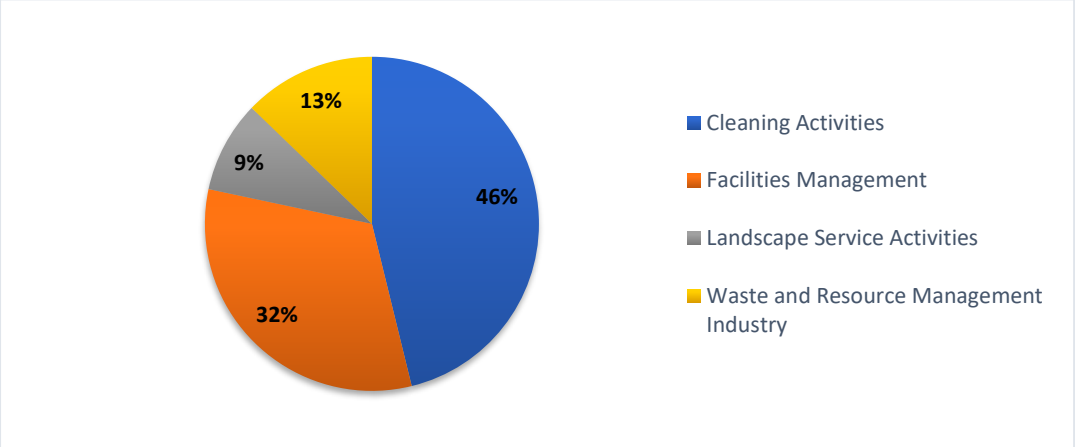
The Wales and Northern Ireland have the lowest proportion of staff (3% and 1% respectively).

4.3 Employment by subindustry

While facilities management accounts for 51% of the industry turnover, only 32% of the employment is within this sub- industry.

Cleaning activities accounts for nearly half (46%) of all employment, with waste and resource management accounting for a further 13%.

Figure 4 Employment by subindustry



Source Business and Employment Survey (ONS 2018)

4.4 Occupational breakdown

The majority (44%) of workers are employed in elementary roles. This is significantly higher than the proportion seen across all UK sectors (Table 2). A further fifth (18%) are skilled traded personnel. The industry employs a significantly lower proportion of professional occupations in comparison to all UK sectors.

Table 2 Occupational profile

	Cleaning Industry	All sectors
Managers, Directors and Senior Officials	11%	11%
Professional Occupations	5%	20%
Associate Professional and Technical Occupations	5%	15%
Administrative and Secretarial Occupations	5%	10%
Skilled Trades Occupations	18%	10%
Caring, Leisure and Other Service Occupations	6%	9%
Sales and Customer Service Occupations	1%	8%
Process, Plant and Machine Operatives	5%	6%
Elementary Occupations	44%	11%

Source Labour Force Survey Apr – June 2018

4.4.1 Key occupations

Given that 43% of the workforce falls within elementary occupations, it is of little surprise that cleaning operatives and domestics, window cleaners and refuse and salvage roles (all of which falls into the elementary occupations category) are all in the top six occupations. Gardeners and landscape gardeners (a skilled trade) account for a further 13% of the workforce.

Table 3 Top ten occupational roles in the cleaning industry

Rank	Occupation	Number	% workforce
1	9233 Cleaners and domestics	260,000	31%
2	5113 Gardeners and landscape gardeners	105,100	13%
3	6240 Cleaning and housekeeping managers and supervisors	29,700	4%
4	9231 Window cleaners	28,400	3%
5	1251 Property, housing and estate managers	26,500	3%
6	9235 Refuse and salvage occupations	24,100	3%
7	8211 Large goods vehicle drivers	19,200	2%
8	4159 Other administrative occupations n.e.c.*	16,900	2%
9	1131 Financial managers and directors	16,500	2%
10	5319 Construction and building trades n.e.c.*	14,500	2%
	Other occupations	284,700	34%
	Total Workforce	825,600	

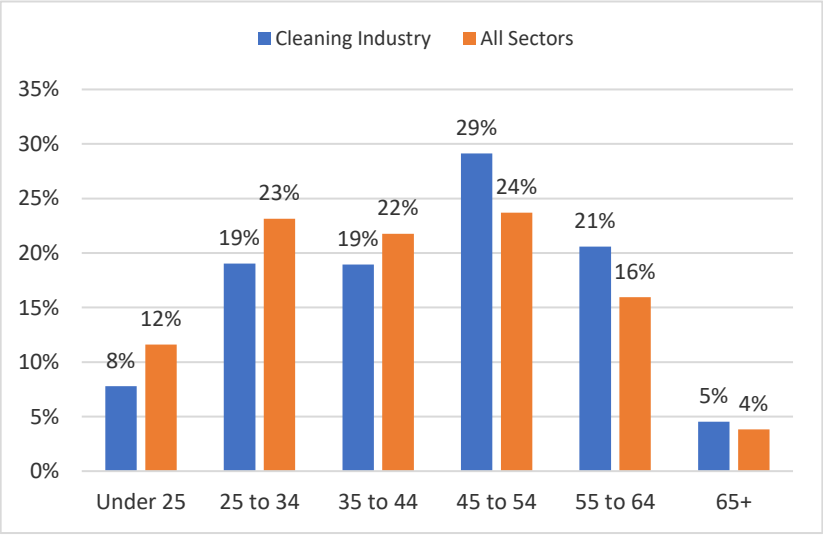
Source Labour Force Survey Apr – June 2018 (*n.e.c. = Not elsewhere classified)

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 industry



Source Labour Force Survey Apr – June 2018

The vast majority of the workforce are aged between 25 and 54 (67%).

The proportion of staff under 25 in the Industry is much lower than seen across the all economy (8% v 12%). In contrast the proportion of staff aged over 55 (26%) is higher (20%) suggesting that that the sector may face issues around an ageing workforce.

4.5.2 Gender

Across the industry the gender of workers is fairly evenly split – 55% are male and 45% female. However, when looking closely at the sub-industries there are noticeable differences (Table 4). For example, the waste and resource management sub-industry and landscape service activities are both dominated by male workers.

Table 4 Gender within the cleaning industry

	% male	% female
Cleaning Activities	36%	64%
Facilities Management	56%	44%
Landscape Service Activities	87%	13%
Waste and Resource Management Industry	88%	12%
Cleaning Industry	**55%**	**45%**
All Sectors	**53%**	**47%**

Source Labour Force Survey Apr – June 2018

There are also further differences in gender across occupational groups (Table 5).

The proportion of women working in elementary occupations is considerably higher in the cleaning industry compared to the whole economy (59% compared to 46%).

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

Table 5 Occupational profile by gender

	Cleaning Industry		All sectors	
	% Male	% Female	% Male	% Female
Managers and Senior Officials	61%	39%	65%	35%
Professional Occupations	71%	29%	50%	50%
Associate Professional and Technical Occupations	51%	49%	56%	44%
Administrative, Clerical and Secretarial Occupations	19%	81%	24%	76%
Skilled Trades Occupations	87%	13%	90%	10%
Personal Service Occupations	40%	60%	18%	82%
Sales and Customer Service Occupations	28%	72%	38%	62%
Transport and Machine Operatives	94%	6%	89%	11%
Elementary Occupations	41%	59%	54%	46%

Source Labour Force Survey Apr – June 2018

Across the industry there are significant variations in the male/female split in particular roles with a polarisation across certain roles. For example, 81% of cleaning operatives and domestic workers are female, but less than 1% of window cleaners are (ONS 2018). While 96% of those in refuse and salvage occupations are male and 86% of gardeners or landscape gardeners are also male.

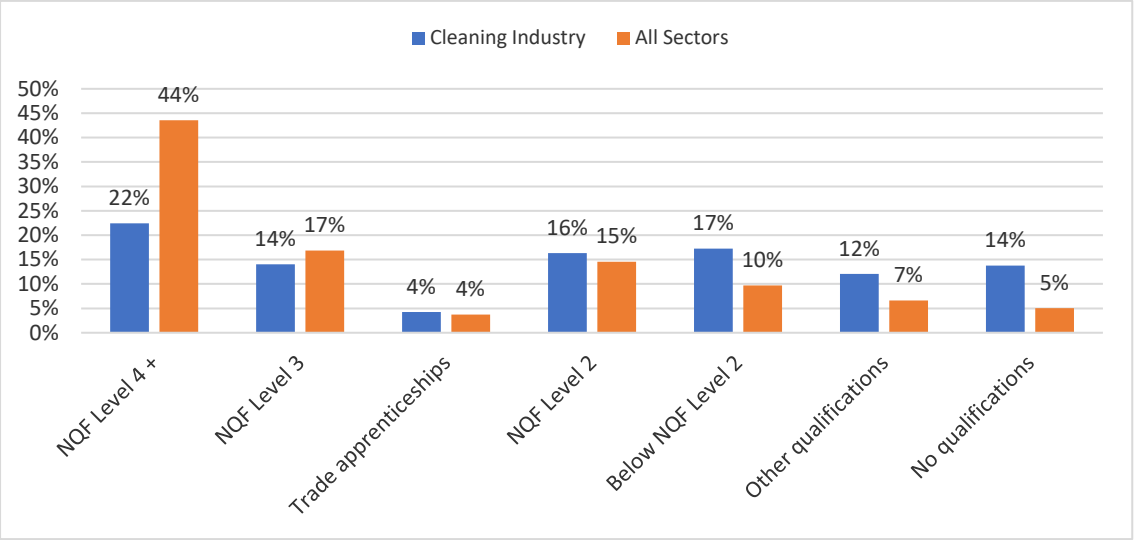
4.5.3 Qualification levels

Workers in the industry hold significantly lower levels of qualifications.

43% of the workforce do not hold a level 2 compared to just 21% across the economy. The industry also has significantly lower proportion holding level 4 qualifications (22% v 44%).

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

Figure 6 Qualification levels



Source Labour Force Survey Apr – June 2018

4.5.4 Migrants

The number of foreign-born people working in the industry accounts for 19% of the workforce. This is slightly greater than all sector figure where 17% of the workforce are foreign born.

There is variation across the nations/regions. For example, in London 53% of the industry workforce were born overseas while in the North East 7% of the workforce were (see Annex Table 33).

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

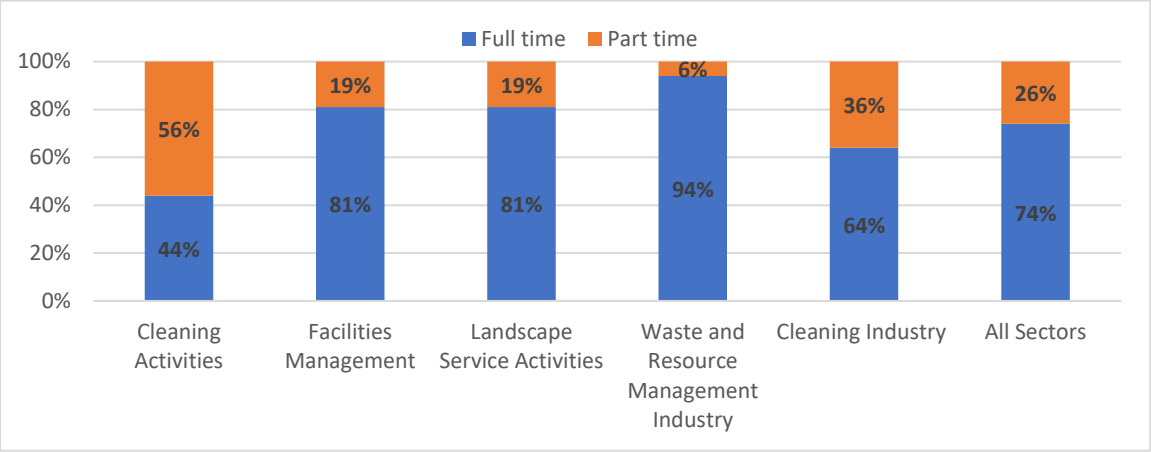
5.1 Flexible working

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 64% of the workforce. However, there are notable differences across the sub-industries (Figure 7). Over half (56%) of workers in cleaning activities industry work part-time. However, the other three sub-industries are dominated by full-time workers.

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



Source Labour Force Survey Apr – June 2018

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 National Living 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 statutory. The Living Wage is a voluntary rate, which is calculated according to the cost of living, based on a basket of household goods and services. The rates are shown in the table below.

Table 6 Wage rates

	National living wage					London Living Wage*	UK Living Wage*
	25 and over	21 to 24	18 to 20	Under 18	Apprentice		
April 2016	£7.20	£6.95	£5.55	£4.00	£3.40	£9.75	£8.45
April 2017	£7.50	£7.05	£5.60	£4.05	£3.50	£10.20	£8.75
April 2018	£7.83	£7.38	£5.90	£4.20	£3.70	£10.55	£9.00
April 2019	£8.21	£7.70	£6.15	£4.35	£3.90	*	*

Source (GOV.UK 2018) *rates announced in November

The latest Office for National Statistics data allows us to investigate the average pay and working hours by industry and occupation.

5.2.1 Pay by sub-industry

In April 2018 the average hourly wage for a full-time worker across the sub-industries is shown below. Cleaning activities and combined facilities support both saw a decrease in average hourly wage of 4.8% and 2.2% respectively. Conversely, landscape service activities experienced greater growth in wages than the average of all employees.

Table 7 Average hourly paid for employees by industry

SIC	Definition	2017	2018	Annual % change
81.2	Cleaning Activities	£9.57	£9.11	-4.8%
81.1	Combined facilities support activities	£12.94	£12.65	-2.2%
81.3	Landscape Service Activities	£9.51	£10.15	6.7%
38.0	Waste collection, treatment and disposal activities; materials recovery	£11.73	£12.00	2.3%
	All employees	£14.00	£14.37	2.7%

Source Annual Survey of Hours and Earnings 2018 Provisional (ONS 2018) * data not available

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 (ONS 2018):

- Cleaning operatives are paid £8.42 per hour, working on average 37.5hrs. But salaries may range between £7.80 to £11.09.
- Street Cleaners are paid on average £9.71 per hour for a 37hr week.
- Window Cleaners average is £9.76 per hour, working on average 39.4hrs.
- Industrial cleaning process occupations are paid on average £9.00 (range £7.84 to £10.55).
- Pest Control officers are paid on average £11.84 per hour.
- Cleaning supervisors average £9.51 but could range from £8.00 to £12.29 per hour.
- Waste disposal and environmental service managers received on average £20.39 per hour.
- Refuse and salvage occupations average £9.66, with hourly rates ranging from £8.01 to £11.43.

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 Sub-industries

The following sections looks in further detail at the four key sub-industries that make up the cleaning industry. These are:

- Cleaning activities.
- Facilities management.
- Landscape service activities.
- Waste and resource management.

6.1 Cleaning activities

Cleaning activities includes the activities of general interior cleaning of all types of buildings, exterior cleaning of buildings, specialised cleaning activities for buildings or other specialised cleaning activities, cleaning of industrial machinery, cleaning of the inside of road and sea tankers, disinfecting and extermination activities for buildings and industrial machinery, bottle cleaning, street sweeping, snow and ice removal.

There are three key activities within this sub-industry:

- General cleaning of buildings (SIC 81.21).
- Other building and industrial cleaning activities, such as window cleaning, specialised cleaning services (i.e. for hospitals, computer rooms) and furnace and chimney cleaning services (SIC 81.22).
- Other cleaning activities, such as disinfecting and extermination services, swimming pool cleaning and cleaning of trains, buses, planes etc. (SIC 81.29).

6.1.1 Market value

Cleaning activities contributed nearly £7.8bn to the economy in 2016. Turnover has increased just 6% since 2010, which is less than all economy growth in which turnover increased by 15% (ONS 2018).

However, there was mixed fortunes across the three activities:

- General cleaning of buildings generated turnover of £5.2bn (67% of the total), which increased 5% since 2010.
- Other building and industrial cleaning activities saw a decrease in turnover of 3% in the same time period and currently generates £746m.
- Other cleaning activities saw the largest increase in turnover (23%) since 2010. It accounted for 23% of the sub-industry total at nearly £1.8bn.

6.1.2 Businesses and the workforce

There are 21,120 businesses in this sub-industry, which accounts for a third (33%) of all businesses in the cleaning industry. 59% are involved in the general cleaning of buildings (see annex Table 21). 80% of businesses are micro – employing less than 10 people.

In 2016, 2,770 new businesses started up in this sub-industry. This was a slight declined on the previous year which saw 2,845 new openings. The sub-industry saw 2,490 businesses stop trading in 2016. The 5-year survival rate of firms in this sub-industry is 44.6%, which is in line with all businesses (44.1%).

422,000 individuals work in the cleaning activities sub-industry. Since 2015 employment numbers have fallen 9%. The majority (82%) of the workforce are employed within the activity of general cleaning of buildings.

The top four occupations are:

- Cleaning operatives and domestic workers, accounting for 62% of the workforce.
- Window cleaners - 7% of the workforce.
- Cleaning and housekeeping managers and supervisors – 7% of the workforce.
- Industrial cleaning process occupations – 2%

Key workforce characteristics are shown in the tables below. However, main areas to highlight include:

- The dominance of female workers (73%) in the activities of general cleaning of buildings, while males are more likely to work in other building and industrial cleaning activities.
- The sub-industry has low levels of qualification across all three activities. This is reflective of the occupational profile in which 76% of this sub-industry workforce is within elementary positions, where skills required are not that complex.
- Migrants workers account for nearly a third of workers in the general cleaning of buildings, compared to just 17% across entire UK workforce.

Table 8 Workforce characteristics in key groups of cleaning activates

	%	General cleaning of buildings	Other building and industrial cleaning activities	Other cleaning activities	Total Cleaning Activities
Gender	Male	27%	73%	42%	36%
	Female	73%	27%	58%	64%
Age	Under 25	8%	11%	9%	8%
	25 – 54 yrs	66%	67%	64%	66%
	55 + yrs	26%	22%	26%	26%
	Full-time	36%	66%	60%	44%
	Part-time	64%	34%	40%	56%
Qualifications	Below L2	59%	49%	38%	55%
	Level 2 & 3	27%	42%	38%	31%
	Level 4+	14%	10%	25%	15%
Migrants	UK Born	68%	89%	75%	72%
	Overseas	32%	11%	25%	28%

Source Labour Force Survey Apr-June 2018

Table 9 Occupational profile in cleaning activities

	General cleaning of buildings	Other building and industrial cleaning activities	Other cleaning activities	Total Cleaning Activities	All sectors
Managers, Directors and Senior Officials	5%	1%	3%	4%	11%
Professional Occupations	1%	1%	8%	2%	20%
Associate Professional and Technical Occupations	1%	4%	5%	2%	15%
Administrative and Secretarial Occupations	2%	2%	7%	3%	10%
Skilled Trades Occupations	1%	2%	1%	1%	10%
Caring, Leisure and Other Service Occupations	9%	9%	13%	10%	9%
Sales and Customer Service Occupations	0%	0%	3%	1%	8%
Process, Plant and Machine Operatives	2%	3%	1%	2%	6%
Elementary Occupations	79%	77%	58%	76%	11%

Source Labour Force Survey Apr-June 2018

6.2 Facilities Management

Facilities Management (FM) is the management of services that support the core business of commercial or institutional buildings. Good facilities management makes a huge difference to the efficiency and productivity of a company, its staff and even its clients. It is the discipline that ensures all the different buildings and services of a company work as efficiently as possible. FM is often outsourced to an external company who are facility experts. Disciplines and services that fall within FM include:

- Procurement and contract management.
- Building and grounds maintenance.
- Security.
- Cleaning.
- Catering.
- Health and safety.

Today FM functions are no longer performed and managed in silos, there is a more integrated approached with all functions being considered holistically (Hodge, Poglitsch and Ankerstjerne 2014).

There are three key activities in FM:

- Management of real estate on a fee or contract basis (SIC 68.32).
- Renting and leasing of office machinery and equipment (including computers) (SIC 77.33).
- Combined facilities support activities (SIC 81.10).

6.2.1 Market value

In 2016, the UK FM industry had a turnover of over £25bn, up from £18.6bn in 2010 – a 36% increase. This is much greater than the all economy growth in which turnover increased by 15% (ONS 2018).

However, there was mixed fortunes across the three activities:

- Management of real estate on a fee or contract basis generated turnover of £10.8bn (43% of the sub-industry the total) in 2016. This activity saw an increase in turnover of 35% since 2010.
- Renting and leasing of office machinery and equipment saw turnover increase by just 1% between 2010 and 2016. Turnover stood at £724m.
- Combined facilities support activities saw the largest increase in turnover (40%) since 2010. It accounted for 54% of the sub-industry total at £13.8bn.

6.2.2 Businesses and the workforce

There are 19,825 businesses in this sub-industry, which accounts for a three in ten (31%) of all businesses in the cleaning industry. 82% are involved in the management of real estate on a fee or contract basis (see annex Table 21). 91% of businesses are micro – employing less than 10 people.

In 2016, 705 new businesses started up in this sub-industry. This was an increase on the previous year which saw 630 new openings. The sub-industry, however, also saw 620 businesses stop trading in 2016. The 5-year survival rate of firms in this sub-industry is 42.3%, which is slightly below the all businesses rate (44.1%).

294,000 individuals work in the FM sub-industry. Since 2015 employment numbers have remained relatively stable, with employment growth of just 1% recorded. The majority (63%) of the workforce are employed within combined facilities support activities, and a further third (36%) working within the management of real estate.

The top four occupations in the sub-industry are:

- Property, housing and estate managers, accounting for 14% of the workforce.
- Other administrative occupations – 7% of the workforce.
- Construction and building trades n.e.c. – 6% of the workforce.
- Financial managers and director – 6% of the workforce.

Key workforce characteristics are shown in the tables below. However, main areas to highlight include:

- The low proportion of young workers: just 5% are under the age of 25, but conversely nearly three in ten (28%) are over the age of 55.
- The sub-industry is highly qualified with 41% holding a level 4 or above. This is greater than the cleaning industry average where just 23% hold a level 4 or above qualification. This reflects the occupational profile of the FM workforce, in which 31% are in managerial or senior positions and 12% in professional occupations, where the skills requirements are more complex.

Table 10 Workforce characteristics across the activities in facilities management

	%	Management of real estate on a fee or contract basis	Combined facilities support activities	Total Facilities Management
Gender	Male	45%	59%	56%
	Female	55%	41%	44%
Age	Under 25	7%	5%	5%
	25 – 54 yrs	68%	67%	67%
	55 + yrs	25%	28%	28%
	Full-time	82%	81%	81%
	Part-time	18%	19%	19%
Qualifications	Below L2	16%	20%	19%
	Level 2 & 3	30%	43%	40%
	Level 4+	53%	37%	41%
Migrants	UK Born	87%	85%	85%
	Overseas	13%	15%	15%

Source Labour Force Survey Apr-June 2018 * data not available for renting and leasing of equipment.

Table 11 Occupation profile in facilities management activities

	Management of real estate on a fee or contract basis	Combined facilities support activities	Total Facilities Management	All sectors
Managers, Directors and Senior Officials	35%	30%	31%	11%
Professional Occupations	13%	12%	12%	20%
Associate Professional and Technical Occupations	14%	18%	17%	15%
Administrative and Secretarial Occupations	30%	9%	14%	10%
Skilled Trades Occupations	5%	17%	15%	10%
Caring, Leisure and Other Service Occupations	3%	4%	4%	9%
Sales and Customer Service Occupations	*	2%	2%	8%
Process, Plant and Machine Operatives	*	1%	*	6%
Elementary Occupations	*	8%	5%	11%

Source Labour Force Survey Apr-June 2018 * data not available for renting and leasing of equipment.

6.3 Landscape activities

Businesses in this sub-industry provide a range of services. They may plant, care for and maintain the gardens and green spaces of residential properties, public and semi-public buildings, municipal grounds, sports grounds, industrial and commercial buildings and roads.

6.3.1 Market value

In 2016, the UK landscape activities had a turnover of over £4.6bn, up from £3bn in 2010 – a 54% increase. This is much greater than the all economy growth in which turnover increased by 15% (ONS 2018).

6.3.2 Businesses and the workforce

There are 18,715 businesses in this sub-industry, which accounts for 29% of all businesses in the cleaning industry. Since 2010, the number of businesses operating has increased 15%, from 16,335. 88% of businesses are micro – employing less than 10 people and just 1% employ more than 250+ individuals.

In 2016, 1,755 new businesses started up in this sub-industry. This was an increase on the previous year which saw 1,435 new openings. The sub-industry saw 1,415 businesses stop trading in 2016.

Industry growth has been supported by public-sector entities outsourcing landscaping services, but also the barriers to entry are low. There are few regulations and skill requirements for new firms and industry participants.

81,000 individuals work in the landscape activities sub-industry. Since 2015 employment numbers have increased 13%. Gardeners and landscape gardeners account for 70% of the workforce.

Key workforce characteristics of the sub-industry are shown in the tables below. However, main areas to highlight include:

- The dominance of male workers. 87% of the workforce are male compared to an UK all sector figure of 53%.
- A third (33%) do not hold a level 2 qualification.
- Three quarters (79%) work in roles classified as are skilled trade occupations.

Table 12 Workforce characteristics across the landscape activities

	%	**Landscape activities**	**All sectors**
Gender	Male	87%	53%
	Female	13%	47%
Age	Under 25	11%	12%
	25 – 54 yrs	68%	69%
	55 + yrs	21%	20%
	Full-time	81%	74%
	Part-time	19%	26%
Qualifications	Below L2	33%	21%
	Level 2 & 3	40%	35%
	Level 4+	27%	44%
Migrants	UK Born	94%	83%
	Overseas	6%	17%

Source Labour Force Survey Apr-June 2018 * data not available for renting and leasing of equipment.

Table 13 Occupation profile in landscape activities

	Landscape activities	All sectors
Managers, Directors and Senior Officials	7%	11%
Professional Occupations	3%	20%
Associate Professional and Technical Occupations	1%	15%
Administrative and Secretarial Occupations	2%	10%
Skilled Trades Occupations	79%	10%
Caring, Leisure and Other Service Occupations	*	9%
Sales and Customer Service Occupations	1%	8%
Process, Plant and Machine Operatives	2%	6%
Elementary Occupations	5%	11%

Source Labour Force Survey Apr-June 2018 * data not available

6.4 Waste and resource management

Waste and resource management activities are becoming recognised as a priority for today's society with an increasing focus on the 3Rs - Reduce, Reuse, Recycle. The economic value of diverting waste away from landfill has been recognised by the Government as an important approach for improving environmental and economic outcomes (Defra 2018).

There are two key activities in this sub-industry:

- Waste collection (SIC 38.11 & 38.12).
- Waste treatment and disposal (SIC 38.21 & 38.22).

6.4.1 Market value

The waste and resource management sub-industry generated a turnover of nearly £12.2bn in 2016. This was an increase of 47% since 2010, which was greater than all industry increase of 15%.

However, there was mixed fortunes across the two activities:

- Waste collection contributed 69% of the sub-industry turnover at £8.4bn. This area saw turnover increase by 50% since 2010.
- Waste treatment and disposal accounted for a third (31%) of the sub-industry total turnover, with turnover increasing from £2.7bn to £3.8bn between 2010 and 2016.

6.4.2 Businesses and the workforce

There are 3,830 businesses in this sub-industry, which accounts for 6% of all businesses in the cleaning industry. In this sub-industry, 70% are involved in the collection of waste and 30% in waste treatment and disposal (see annex Table 21).

62% of businesses are micro – employing less than 10 people and just 1% employ more than 250+ individuals.

In 2016, 515 new businesses started up in this sub-industry. This was a slight increase on the previous year which saw 490 new openings. The sub-industry saw 505 businesses stop trading in 2016. The 5-year survival rate of firms in this sub-industry is 37%, which is below the all businesses rate of 44.1%.

117,000 individuals work in the waste and resource sub-industry. Since 2015 employment numbers have increased 23%. Six in ten (59%) of the workforce are employed within the collection of waste. Treatment and disposal of waste accounts for 41% of the workforce.

The top four occupations in the sub-industry are:

- Refuse and salvage occupations accounting for 26% of the workforce.
- Large goods vehicle drivers – 20% of the workforce.
- Street cleaners – 7% of the workforce.
- Mobile machine drivers and operatives – 5% of the workforce.

Key workforce characteristics are shown in the tables below. However, main areas to highlight include:

- The dominance of male workers in each activity, but in particular waste collection where 96% of the workforce are male.
- The sub-industry has low levels of qualification. This is reflective of the occupational profile in which 73% of this sub-industry workforce is within elementary positions and process, plant and machine operatives, where skills required are not that complex.

Table 14 Workforce characteristics in key groups of waste and resource management

	%	**Waste collection**	**Waste treatment and disposal**	**Total waste and resource management**
Gender	Male	96%	81%	88%
	Female	4%	19%	12%
Age	Under 25	8%	4%	6%
	25 – 54 yrs	62%	78%	70%
	55 + yrs	30%	18%	24%
	Full-time	95%	92%	94%
	Part-time	5%	8%	6%
Qualifications	Below L2	61%	47%	54%
	Level 2 & 3	32%	33%	33%
	Level 4+	6%	20%	13%
Migrants	UK Born	90%	89%	90%
	Overseas	10%	11%	10%

Source Labour Force Survey Apr-June 2018

Table 15 Occupational profile within waste and resource management activities

	Waste collection	Waste treatment and disposal	Total waste and resource management	All sectors
Managers, Directors and Senior Officials	9%	10%	9%	11%
Professional Occupations	*	11%	5%	20%
Associate Professional and Technical Occupations	2%	7%	4%	15%
Administrative and Secretarial Occupations	2%	7%	5%	10%
Skilled Trades Occupations	3%	1%	2%	10%
Caring, Leisure and Other Service Occupations	*	*	*	9%
Sales and Customer Service Occupations	1%	*	1%	8%
Process, Plant and Machine Operatives	29%	36%	32%	6%
Elementary Occupations	54%	28%	41%	11%

Source Labour Force Survey Apr-June 2018

6.4.3 Waste handled

Across England local authorities managed waste[1] was 25.6 million tonnes in 2017/18, a slight decrease on the previous year from 26.3 million tonnes (Defra 2018).

Around 12.5% of all local authority managed waste was sent to landfill in 2017/18. This was equivalent to a total 3.2 million tonnes of waste, and 924 thousand tonnes lower than in 2016/17, a fall of 22.3%. There was 2.5 million tonnes of waste sent direct to landfill in 2017/18, this was 77.1% of the landfill total compared to 78.2% some 3.2 million tonnes in 2016/17.

Around 42% of all local authority waste was incinerated. Landfill tax continues to be the main driver for diverting waste from landfill. Increasing numbers of EfW incineration plants have come on line in recent years and this has provided local authorities with a cheaper alternative to landfill gate fees (Defra 2018).

Overall 42.4% all local authority waste was sent for recycling in 2017/18.

[1] Local authority collected waste consists of all waste from households', street sweepings, municipal parks and gardens waste, beach cleansing waste and waste resulting from the clearance of fly-tipped materials plus some commercial or industrial waste.

7 Recruitment and Skills

7.1 Recruitment

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.

7.1.1 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. Key headline data reveals (Department for Education 2018):

- 19% of firms in the industry reported at least one vacancy at the time of the survey; in line with UK findings of 20%.
- In volume terms there were just over 18,000 vacancies, equivalent to 3.5% of total employment.
- 54% of the vacancies reported were for elementary roles, 15% for skilled trades occupations, 6% machine operatives, 5% for admin roles and just 3% for managerial positions.
- Nearly a third (29%) of all vacancies were considered to be hard-to-fill, lower than the UK all sector findings of 33%.
- 18% of all vacancies were considered to be skill-shortage vacancies (SSV). This is slightly lower than UK all sector findings of 22.5%.

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

- Reading and understanding instructions, guidelines, manuals or reports
- Specialist skills or knowledge
- Writing instructions, guidelines, manuals or reports
- Knowledge of products and services
- Manual dexterity

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 hard to fill vacancies were:

- Increase workload for other staff
- Lose business or orders to competitors
- Experience increased operating costs
- Have difficulties meeting customer service objectives
- Have difficulties introducing new working practices
- Outsource work

7.2 Internal skills challenge

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.

7.2.1 Skills gaps

The majority of firms report having a fully proficient workforce. However, 12% of all firms in the industry report having skills gaps, with 4% of all workers not considered fully proficient in their role. (UK finding 13% of firms and 4% 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
- They have been on training, but their performance has not improved sufficiently

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.

81% of establishments with skills gaps reported these as having an impact on their organisation's performance (21% reporting a 'major' impact). This is greater than UK all sector finding where 66% of firms with skills gaps reported these as having an impact.

The specific implications of skills gaps for the businesses in the industry who reported them included:

- Increase workload for other staff
- Having higher operating costs
- Difficulties meeting quality standards
- The loss of business or orders to competitors

87% of establishments in the industry reported undertaking steps to improve efficiency or skills of staff with skills gaps. This is in line with the UK all sector finding (85%). Action taken to overcome lack of proficiency among staff included:

- Increase training activity
- More supervision
- Implementation of mentoring / buddying scheme
- More appraisals
- Reallocating work

7.3 Training

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

60% of firms in the industry had arranged or funded some form of training in 2017. This is lower than UK all sector where 66% of firms provided training.

Overall 57% of staff in the industry received training. This is again lower than the UK all sector findings in which 62% of all staff received training in 2017.

43% of employers in the industry that trained would have liked to provide more training were they able to over the last 12 months. The most common reasons for employers being unable to deliver as much training as they would have liked were not having the funds to do so and being unable to spare more staff time for training.

Two in five (40%) employers chose not to provide any training or development for their staff in the previous 12 months. Reasons for this included:

- All staff are fully proficient / no need for training
- Training not considered to be a priority for the establishment

7.4 Apprenticeships in the industry

The government has made a 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.

There are three industry specific frameworks available at various levels (Table 16). In 2017/18, there were 1,580 starts, with the majority of starts at level 2.

Table 16 Apprenticeship framework starts

Framework	Level	2014 - 15	2015 - 16	2016 – 17	2017 - 18	Withdrawal date
Facilities Management	2	1,730	990	980	640	31/07/2020
Facilities Management	3	320	220	280	150	
Facilities Management	4	10	-	-	10	
Facilities Management	5	-	10	-	10	
Cleaning and Support Service Industry	2	3,430	2,980	2,590	560	
Cleaning and Support Service Industry	3	90	140	90	90	
Sustainable Resource Management	2	780	300	340	80	
Sustainable Resource Management	3	300	240	60	30	
Sustainable Resource Operations and Management	4	30	100	140	10	

Source Apprenticeships and traineeships data (DfE 2018)

Apprenticeship standards are relatively new and at present there are only two industry specific standards available (Table 17).

Table 17 Apprenticeship standard starts

Standard	Level	2016 – 17	2017 - 18
Facilities Management Supervisor	3	20	270
Facilities Manager	4	-	10

Source Apprenticeships and traineeships data (DfE 2018)

7.5 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 18 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 Health and safety

The cleaning industry operates in a variety of environments, such as homes, offices, industries, schools, shops, offices, aircrafts and hospitals and it also performs abroad range of activities. The risks that the workforce are exposed to, therefore depend on the tasks they perform but also on the premises they work in.

The main hazards can be chemical, biological and/or physical.

- **Chemical**

Exposure to chemicals depends on the type products used as well as on the characteristics of the working environment in which they are used (for example the efficiency of ventilation during and after cleaning) and the conditions of use (such as frequency, quantity, application mode and cleaner's breathing rate). Workers may be exposed to a broad range of different chemicals, for example:

- Those contained in the cleaning products used for dust and dirt removal, disinfection, surface maintenance, like volatile organic compounds (VOCs) (e.g. acetone, formaldehyde, halogenated alkanes), surfactants, film formers (such as wax), complexing agents (e.g. EDTA), acids (e.g. hydrochloric acid) and bases (e.g. potassium hydroxide), biocides, additives such as colour pigments and fragrances.
- But also from the substances contained in dust, dirt, soot which can be for example aerosolized and inhaled when being cleaned, such as VOCs, surfactants, quartz, minerals and other inorganic substances (for example, trace metals).

Furthermore over-dosage, mixing different products or the incorrect use of some cleaning products may create unexpected chemical reactions and release dangerous substances.

Therefore, when assessing the chemical risks that cleaning workers may be exposed to, the chemical substances present in dirt, dust, soot particles, etc. being cleaned, as well as the characteristics of the environment and the work process have to be taken in account in addition to the chemical components of the cleaning products used. Depending on the chemical substances involved, different types of health outcomes may be caused such irritation of the eyes and mucous membranes, skin dermatitis, respiratory disorders, including asthma, and cancers. The chemicals contained in some cleaning agents may also be flammable or explosive (European Agency for Safety and Health at Work 2009).

- **Biological**

The workforce may also be exposed to various biological agents such as micro-organisms (bacteria, viruses and moulds) and their products, such as fungal secretions and bacterial endotoxins present in dust as well as in aerosols created during the cleaning process, including when vacuuming.

The main exposure routes are similar as the chemical hazards in that it's mainly inhalation, dermal uptake and accidental ingestion. Workers in the healthcare sector and in public places where they may come in contact with contaminated needles and sharps can also be exposed to blood-borne pathogens. Possible contact with animals (e.g. pets, rodents and birds) and their secretion and droppings, as well as with insects (e.g. mosquitoes) may also put individuals at risk.

- **Physical**

The physical hazards that maybe encountered in the workplace are numerous – these may not just be from the individuals work equipment in use but also from the environment where they are working. For example, hazards can include falls from ladders, working at heights, wet or slippery floors, falling objects, sharp objects, moving or rotating machinery parts.

Furthermore, cleaning work can be physically demanding and impact the musculoskeletal and cardiorespiratory systems. Cleaners often work in awkward postures, bent forward and with twisted backs, because of the poor ergonomic characteristics of the cleaning equipment or of the work environment (e.g. confined places). At the same time, they sometimes have to lift heavy pieces of furniture or work equipment. They daily perform a high number of repetitive movements which sometimes require the application of high forces, for example when scrubbing. The hazards linked to the poor ergonomics of work equipment, such as buffers, mops or vacuums, are strongly related to the particular tool used and also to whether it is adapted to the characteristics and specific needs of the worker taking into account their anthropometry, physical strength, etc. This combination of factors, to which they are in many cases, puts them at high risk of developing musculoskeletal disorders (MSDs). Adequate work equipment and training on how to use it correctly are crucial.

The use of vibrating equipment can reinforce negative effects of physical strain such as awkward postures, handling heavy loads, etc., and lead to MSDs, numbness in the limbs and neurological disorders in the hand-arm system (carpal tunnel syndrome, white finger syndrome).

Other physical hazards also include noise: some cleaning machines can produce noise levels which may lead to collisions and accidents when they cover the sound of other people or vehicles approaching. There are also electrical hazards: defective electrical tools and equipment, appliances, wiring, switch panels and electrical outlets or transformers can be a hazard.

8.1 Industrial accidents and work-related illness

Data published by the HSE reveals (HSE 2018):

- 5 fatal injuries to workers in 2017/18 within Services to buildings and landscape activities (SIC 81) and 2,390 non-fatal injuries to workers were reported by employers in 2017/18 (Source RIDDOR).
- 12 fatal injuries to workers in 2017/18 within Waste collection, treatment and disposal activities; materials recovery (SIC 38) and 1,778 non-fatal injuries to workers were reported by employers in 2017/18 (Source RIDDOR).
- It is estimated that 239,000 days off work were taken by cleaners and domestic operatives due to self-reported illness caused or made worse by current or most recent job.

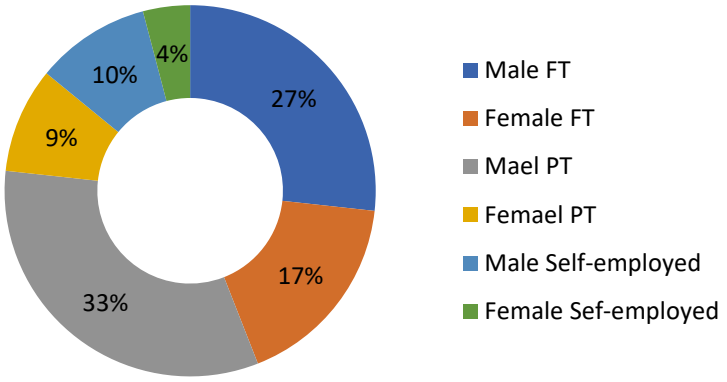
9 Future workforce projections

The future workforce projections in the following section contains data for all of SIC 81: Services to buildings and SIC 38-39: Waste Management. It excludes data for SICs 68.32 and 77.33.

9.1 Industry growth

Employment in the industry is expected to grow 9.0% between 2014 and 2024 – or by 93,000. This is greater than whole economy where growth of 5.5% is anticipated (UKCES 2016).

Figure 8 Anticipated employment by gender and status, 2024



With an anticipated workforce of 1,117,000 in 2024, 42% of the workers will be part-time.

44% will be full-time and 14% self-employed (Figure 8).

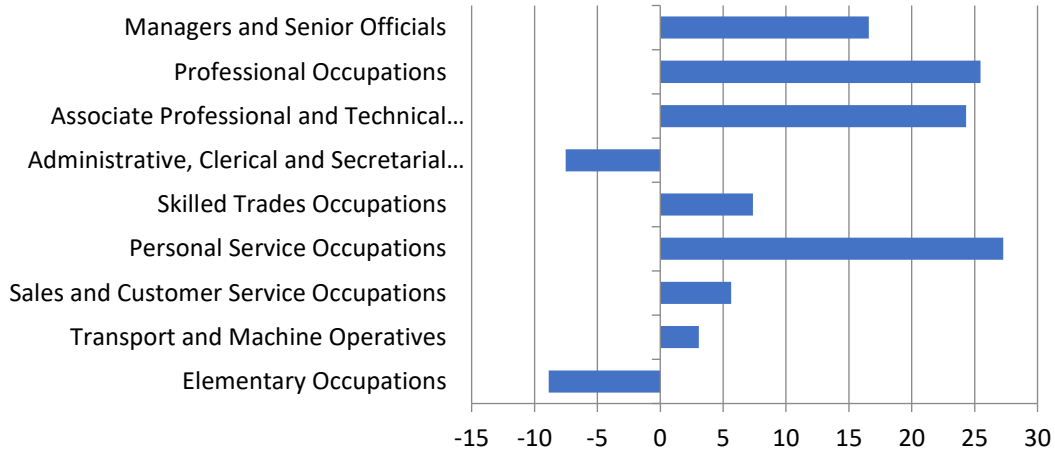
Source: UKCES Working Futures VI

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 Occupational change, 2014 – 2024 (000s)



Source UKCES Working Futures VI

9.2 Replacement need and total demand

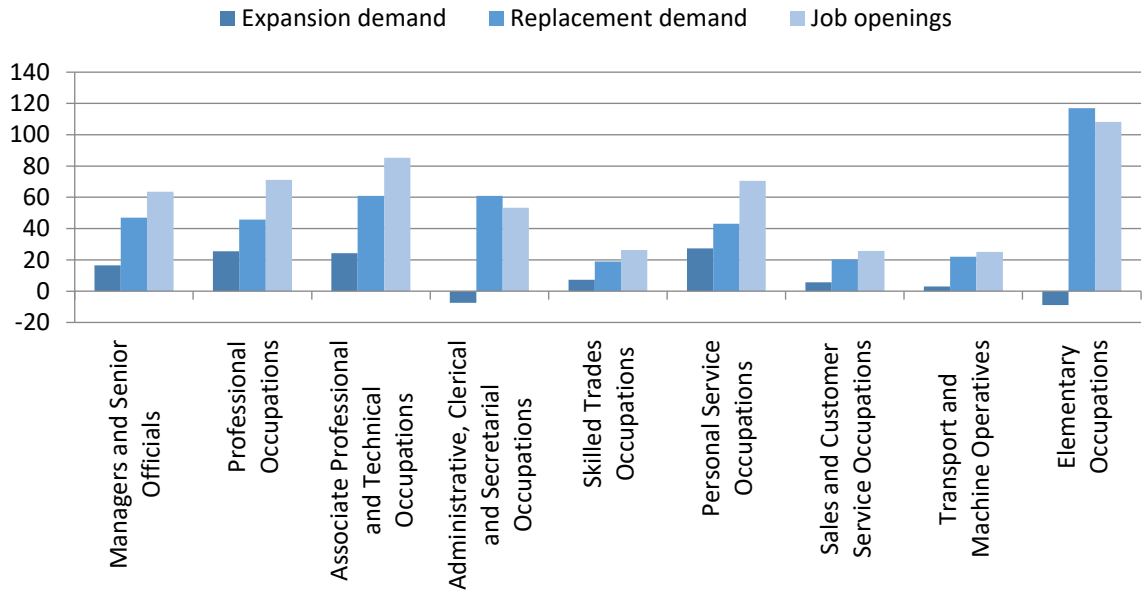
The above occupational change data is useful indicator of changing patterns of demand for skills. However, it also important to consider the replacement demands – the job openings created by the outflow of workers from the labour market.

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 529,000 job openings between 2014 and 2024: 93,000 industry growth and 436,000 replacement demand. A fifth of all job openings will be within elementary occupations (Figure 10).

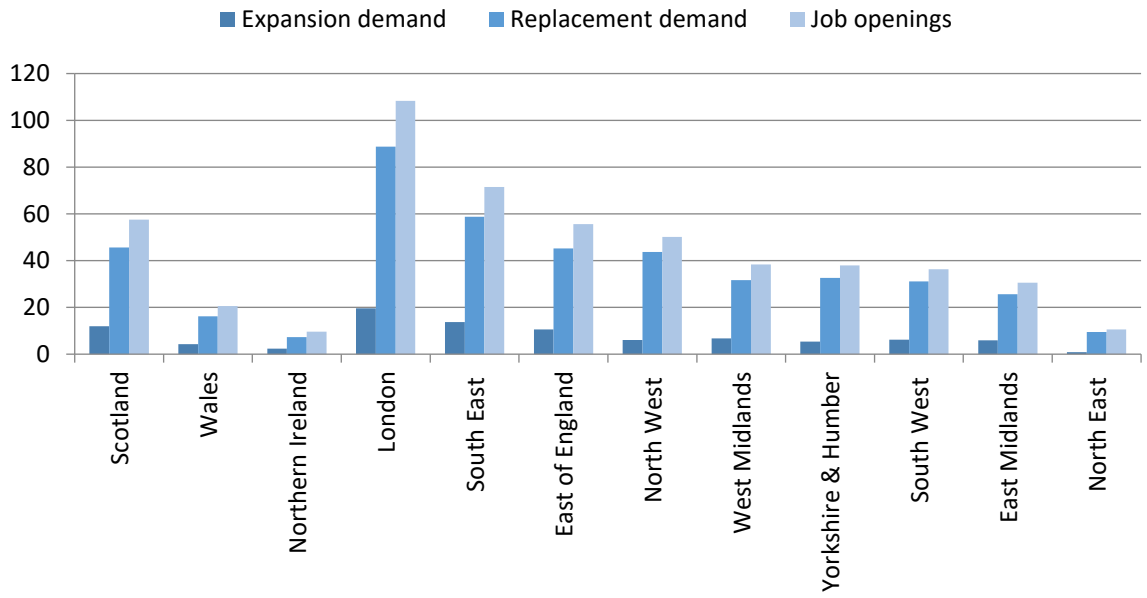
Figure 10 Job openings in the industry by occupation, 2014 -2024 (000s)



Source UKCES Working Futures VI

Nearly 108,000 of the anticipated job openings will be across London and a further 72,000 in the South East (Figure 11). These are the two regions with the highest proportion of individuals in the industry.

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



Source UKCES Working Futures VI

9.3 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, 49% 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 19 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**	299,200 187,700	206,000 216,300	166,700 168,400	281,500 440,000	69,900 104,200
2014 – 2024 % change	-37%	5%	1%	56%	49%
2014 % share	29%	20%	16%	28%	7%
2024 % share	17%	19%	15%	39%	9%

Source UKCES Working Futures VI

10 Drivers of change in the Industry

10.1 Political

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

Labour Market Enforcement Strategy

The Labour Market Enforcement Strategy sets Sir David Metcalf, the Director of Labour Market Enforcement recommendations to improve state-led enforcement of employment rights including measures to be taken by the 3 labour market enforcement bodies (Metcalf 2018):

- Gangmasters and Labour Abuse Authority (GLAA)
- Employment Agency Standards Inspectorate (EAS)
- HMRC National Minimum Wage and National Living Wage team (HMRC NMW)

Alongside the strategy a report on how to regulate labour suppliers in Care, Cleaning and Construction was also produced (Humphris and Koumenta 2018). The report considers how regulation might be used to ensure adequate pay and working conditions are provided to contracted workers. It reports that in cleaning existing regulation is accreditation and the authors recommended expansion of existing accreditation. The recommendation has not been endorsed by Sir Metcalf, but he is undertaking further consultations with the sector.

United Voices of the World (UVW)

UVW is a members-led, campaigning trade union which supports and empowers the most vulnerable groups of precarious, low-paid and predominantly migrant workers in the UK (UVW 2018).

They campaign for all members to receive at least the London Living Wage (£10.55 per hour as of November 2018), contractual sick pay and other rights, dignified and safe conditions, and general respect. They also challenge outsourcing itself, which creates two-tier workforces in order to slash wage bills and deny important rights.

A number of campaigns and strikes have included cleaners to win pay, rights & conditions for our members.

Business Rate Cuts and Public Facilities

The British Toilet Association has estimated that 40% of public toilets have disappeared in the past decade. Since 2010, more than 600 public toilets across the UK have stopped being maintained by councils and in 37 areas major councils no longer run any (BBC News 2018). Local authorities are not legally required to provide toilets, so they are often closed as councils look to cut costs

Traditionally, public toilets have been liable for business rates in the same way as other non-domestic premises such as shops and offices. This means that business rates on public conveniences currently cost local authorities including local (parish and town) councils around £8m (NALC 2018). But in the 2018 Autumn Budget it was announced that business rates on standalone public use toilets were to cease (BBC News 2018).

Resource and Waste Strategy

In December 2018, government published a Resources and Waste Strategy (Defra 2018). The strategy sets out a long-term blueprint for waste prevention, reuse and recycling in the UK.

At its core, this strategy demands better coordination between all of those involved in the production and management of waste – from product-design to retail, consumption, collection and recycling or reuse. For example, it is recognised that there is a need to drive better quantity and quality in recycling, and more investment in domestic recycled materials markets. Reducing food waste also has a strong focus within the report. At the moment only 35% of households in England are obliged to put food waste in its own caddy. This strategy may have a significant impact on the waste and resource sub-industry in the coming years.

10.2 Economic

Contracting

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

As labour costs tend to make up the largest part of the costs of a 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. Or it can result in contracts being revised downwards, with reductions in services or frequencies. This may result in the dropping of standards, which would not be to the satisfaction of customers or providers.

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).

Universal Credit

Universal Credit (UC) could have a major effect on the labour market as it continues its roll out. Relative to the pre-Summer Budget 2015 UC system, the various work allowance and taper changes of recent years have offered slightly improved incentives for all UC recipients to progress to higher hours or earnings levels (Finch and Gardiner 2018). However, there are concerns that UC continues to incentivise, for example, single parents (particularly renters) to reduce working hours below the 16 hours backstop present in the tax credits system (Finch and Gardiner 2018).

Anecdotal reports from the ABCD, indicates that cleaning service managers are reporting a pattern of staff requesting a reduction in hours to ensure that they are not in a situation where it costs more for an individual to work then to live on benefits. This in turn could impact staffing levels.

10.3 Social

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.

Research into facilities management also highlights that people outside of the profession all too often still view FM in a negative or uninformed way (IWFM 2018). While facilities managers themselves talk about not feeling understood, valued or appreciated. FMs believed that the profession needed to be better educated, more strategic and more customer focused (IWFM 2018). Overall, there was a sense that the profession needed to up its game – that it needs to move from being good to being great.

10.4 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. Robots, automation, and smart applications will continue to revolutionise the cleaning industry.

10.5 Environmental

Awareness

The effect of David Attenborough’s ‘Blue Planet’ means that waste, and how we deal with it, is firmly on the national agenda. This has created more pressure than ever on the UK government to rethink its approach to waste and recycling. As a result, we have seen the publications of an ambitious 25-year green plan (HM Government 2018) and the Resource and Waste Strategy (Defra 2018). Interest in how we deal with waste and recycling is therefore set to continue.

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.

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12 Annex: Data Tables

12.1 Turnover

Table 20 Turnover (£ million)

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	% change 2010-16
Cleaning Activities	81.21	General cleaning of buildings	5,000	5,614	5,603	5,526	5,989	5,279	5,239	5%
	81.22	Other building and industrial cleaning activities	766	744	745	745	870	683	746	-3%
	81.29	Other cleaning activities	1,545	1,502	1,350	1,257	1,437	1,532	1,779	15%
Facilities Management	68.32	Management of real estate on a fee or contract basis	8,039	8,101	9,164	9,215	10,316	11,355	10,820	35%
	77.33	Renting and leasing of office machinery and equipment	720	630	732	578	602	564	724	1%
	81.10	Combined facilities support activities	9,853	9,272	10,285	11,034	11,280	12,812	13,826	40%
Landscape Service Activities	81.30	Landscape service activities	3,015	3,403	3,461	3,593	3,538	3,936	4,635	54%
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	5,458	6,173	6,330	6,367	7,870	8,203	8,212	50%
	38.12	Collection of hazardous waste	132	154	154	289	170	149	182	38%
	38.21	Treatment and disposal of non-hazardous waste	2,357	3,167	2,702	3,368	2,736	3,065	3,155	34%
	38.22	Treatment and disposal of hazardous waste	315	431	432	612	597	792	627	99%
Total			**37,200**	**39,191**	**40,958**	**42,584**	**45,405**	**48,370**	**49,945**	**34%**

Source Annual Business Survey (ONS 2018)

12.2 Businesses

Table 21 UK Business Count - enterprises, 2010 - 2018

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018
Cleaning Activities	81.21	General cleaning of buildings	9,020	8,305	8,480	8,165	8,780	11,095	11,390	11,350	12,495
	81.22	Other building and industrial cleaning activities	2,175	2,265	2,480	2,625	2,650	3,125	3,170	3,210	3,265
	81.29	Other cleaning activities	2,875	2,835	3,315	3,540	3,810	4,565	4,900	5,185	5,360
Facilities Management	68.32	Management of real estate on a fee or contract basis	11,125	10,805	11,190	11,620	12,560	13,950	14,920	15,705	16,220
	77.33	Renting and leasing of office machinery and equipment	425	395	370	355	420	445	455	460	455
	81.10	Combined facilities support activities	1,350	1,675	2,050	2,210	2,375	2,630	2,890	2,985	3,150
Landscape Service Activities	81.30	Landscape service activities	16,335	15,815	16,005	15,810	15,820	17,700	18,000	18,310	18,715
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	1,930	2,030	2,170	2,245	2,265	2,305	2,355	2,450	2,560
	38.12	Collection of hazardous waste	55	80	100	105	115	120	115	110	110
	38.21	Treatment and disposal of non-hazardous waste	640	700	795	905	925	935	960	1,005	1,055
	38.22	Treatment and disposal of hazardous waste	40	50	65	85	90	105	110	100	105
Total			**45,970**	**44,955**	**47,020**	**47,665**	**49,810**	**56,975**	**59,265**	**60,870**	**63,490**

Source NOMIS UK Business Count – Enterprise (ONS 2018)

Table 22 Businesses in the Industry by nation and region, 2010 - 2018

	2010	2011	2012	2013	2014	2015	2016	2017	2018
UK	45,970	44,955	47,020	47,665	49,810	56,975	59,265	60,870	63,490
England	38,955	38,085	39,985	40,655	42,785	49,090	51,320	52,945	55,405
Scotland	3,265	3,255	3,385	3,410	3,480	4,020	4,130	4,100	4,175
Wales	2,415	2,355	2,375	2,365	2,365	2,670	2,660	2,625	2,655
Northern Ireland	1,320	1,270	1,275	1,245	1,180	1,180	1,150	1,195	1,280
East of England	5,020	4,910	5,050	5,065	5,185	5,955	6,145	6,400	6,575
East Midlands	3,115	2,965	3,085	3,100	3,220	3,620	3,800	3,845	3,960
London	6,440	6,340	7,100	7,520	8,405	9,560	10,200	10,725	11,130
North East	1,120	1,125	1,170	1,195	1,300	1,510	1,565	1,565	1,615
North West	4,495	4,320	4,490	4,525	4,745	5,520	5,725	5,880	6,060
South East	7,400	7,285	7,710	7,750	8,065	9,305	9,845	10,245	10,585
South West	4,695	4,580	4,590	4,600	4,725	5,520	5,680	5,785	5,925
West Midlands	3,675	3,510	3,655	3,660	3,785	4,270	4,425	4,515	5,490
Yorkshire and Humber	3,040	3,030	3,150	3,235	3,350	3,805	3,945	3,965	4,055

Source NOMIS UK Business Count – Enterprise (ONS 2018)

Table 23 Business by size, 2018

			Micro		Small	Medium		Large	
Sub-Industry	**SIC**	**Definition**	**0 to 4**	**5 to 9**	**10 to 49**	**50 to 99**	**100 to 249**	**250+**	
Cleaning Activities	81.21	General cleaning of buildings	6,625	2,890	2,210	355	225	185	**12,490**
	81.22	Other building and industrial cleaning activities	2,510	395	295	30	20	15	**3,265**
	81.29	Other cleaning activities	3,630	945	680	55	35	15	**5,360**
Facilities Management	68.32	Management of real estate on a fee or contract basis	12,835	2,105	1,110	80	40	45	**16,215**
	77.33	Renting and leasing of office machinery and equipment	335	60	50	10	0	0	**455**
	81.10	Combined facilities support activities	2,435	290	260	55	35	70	**3,145**
Landscape Service Activities	81.30	Landscape service activities	15,930	1,855	850	60	15	10	**18,720**
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	1,615	400	440	55	25	20	**2,555**
	38.12	Collection of hazardous waste	85	10	15	5	0	0	**115**
	38.21	Treatment and disposal of non-hazardous waste	625	160	195	45	20	10	**1,055**
	38.22	Treatment and disposal of hazardous waste	70	15	15	5	5	5	**115**
		Total	**46,695**	**9,125**	**6,120**	**755**	**420**	**375**	**63,490**
		%	74%	14%	10%	1%	1%	0.6%	

Source NOMIS UK Business Count – Enterprise (ONS 2018)

Table 24 Business public or private

			Private				Public company
Sub-Industry	**SIC**	**Definition**	**Company (incl. building society)**	**Sole proprietor**	**Partnership**	**Non-profit body or mutual association**	
Cleaning Activities	81.21	General cleaning of buildings	8,175	3,435	835	50	0
	81.22	Other building and industrial cleaning activities	2,195	900	170	0	0
	81.29	Other cleaning activities	4,025	1,110	210	10	0
Facilities Management	68.32	Management of real estate on a fee or contract basis	14,255	870	665	395	35
	77.33	Renting and leasing of office machinery and equipment	405	25	20	5	0
	81.10	Combined facilities support activities	2,785	225	55	60	25
Landscape Service Activities	81.30	Landscape service activities	9,505	7,505	1,630	70	5
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	2,105	335	95	20	0
	38.12	Collection of hazardous waste	100	10	0	0	0
	38.21	Treatment and disposal of non-hazardous waste	905	95	40	10	5
	38.22	Treatment and disposal of hazardous waste	95	5	5	0	5
		Total	**44,550**	**14,515**	**3,725**	**620**	**75**
		%	**70%**	**23%**	**6%**	**1%**	**<1%**

Source NOMIS UK Business Count – Enterprise (ONS 2018)

Table 25 Count of births of new enterprises for 2010 to 2016

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016
Cleaning Activities	81.2	General cleaning of buildings Other building and industrial cleaning activities Other cleaning activities	1,480	1,795	1,885	2,620	2,685	2,845	2,770
Facilities Management	68.32	Management of real estate on a fee or contract basis	Data not available						
	77.33	Renting and leasing of office machinery and equipment	Data not available						
	81.10	Combined facilities support activities	525	650	565	590	525	630	705
Landscape Service Activities	81.30	Landscape service activities	985	870	980	1,280	1,170	1,435	1,755
Waste and Resource Management Industry	38.1	Collection of non-hazardous waste Collection of hazardous waste	355	385	425	350	340	350	340
	38.2	Treatment and disposal of non-hazardous waste Treatment and disposal of hazardous waste	145	165	225	165	130	140	175
Total			**3,490**	**3,865**	**4,080**	**5,005**	**4,850**	**5,400**	**5,745**

Source Business Demography – 2016 Enterprise Births, Deaths and Survivals Table 1.2 (ONS 2017)

Table 26 Count of deaths of new enterprises for 2010 to 2016

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016
Cleaning Activities	81.2	General cleaning of buildings Other building and industrial cleaning activities Other cleaning activities	2,270	1,965	2,105	2,010	2,025	2,515	2,490
Facilities Management	68.32	Management of real estate on a fee or contract basis	Data not available						
	77.33	Renting and leasing of office machinery and equipment	Data not available						
	81.1	Combined facilities support activities	205	290	330	310	300	360	620
Landscape Service Activities	81.3	Landscape service activities	1,390	1,250	1,340	1,275	1,270	1,325	1,415
Waste and Resource Management Industry	38.1	Collection of non-hazardous waste Collection of hazardous waste	195	265	280	325	330	310	325
	38.2	Treatment and disposal of non-hazardous waste Treatment and disposal of hazardous waste	85	80	110	130	155	130	180
Total			**4,145**	**3,850**	**4,165**	**4,050**	**4,080**	**4,640**	**5,030**

Source Business Demography – 2016 Enterprise Births, Deaths and Survivals Table 2.2 (ONS 2017)

Table 27 Survival of newly born enterprises by births of units in 2011 (%)

Sub-Industry	SIC	Definition	No of Births (2011)	1-year per cent	2-year per cent	3-year survival	4-year survival	5-year survival
Cleaning Activities	81.2	General cleaning of buildings Other building and industrial cleaning activities Other cleaning activities	1,795	94.2	77.7	63.0	52.6	44.6
Facilities Management	68.32	Management of real estate on a fee or contract basis	Data not available					
	77.33	Renting and leasing of office machinery and equipment	Data not available					
	81.10	Combined facilities support activities	650	92.3	73.1	59.2	48.5	42.3
Landscape Service Activities	81.30	Landscape service activities	870	94.3	77.6	66.7	59.2	0.0
Waste and Resource Management Industry	38.1	Collection of non-hazardous waste Collection of hazardous waste	385	94.8	72.7	53.2	45.5	36.4
	38.2	Treatment and disposal of non-hazardous waste Treatment and disposal of hazardous waste	165	93.9	75.8	57.6	45.5	39.4
Cleaning Industry Total			**3,865**	**93.9**	**76.3**	**61.9**	**52.3**	**33.1**
All Businesses			**261,370**	**93.1**	**75.6**	**60.5**	**51.0**	**44.1**

Source Business Demography – 2016 Enterprise Births, Deaths and Survivals Table 5.2a (ONS 2017)

12.3 Employment

Table 28 Employment (GB)

Sub-Industry	SIC	Definition	2015	2016	2017	% Change 2015 - 2017
Cleaning Activities	81.21	General cleaning of buildings	386,000	362,000	348,000	-10%
	81.22	Other building and industrial cleaning activities	25,000	23,000	23,000	-8%
	81.29	Other cleaning activities	51,000	49,000	51,000	0%
Facilities Management	68.32	Management of real estate on a fee or contract basis	104,000	97,000	105,000	1%
	77.33	Renting and leasing of office machinery and equipment	3,500	3,000	3,000	-14%
	81.10	Combined facilities support activities	183,000	195,000	186,000	2%
Landscape Service Activities	81.30	Landscape service activities	72,000	72,000	81,000	13%
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	59,000	71,000	65,000	10%
	38.12	Collection of hazardous waste	1,000	1,500	4,000	300%
	38.21	Treatment and disposal of non-hazardous waste	28,000	32,000	41,000	46%
	38.22	Treatment and disposal of hazardous waste	7,000	7,000	7,000	0%
		Total	919,500	912,500	914,000	-1%

Source NOMIS Business Register and Employment Survey (ONS 2018)

Table 29 Employment by nation and region

	2015	2016	2017	Growth 2015-2017
East of England	101,190	106,050	103,475	2%
East Midlands	46,180	39,450	38,975	-16%
London	197,660	187,375	172,475	-13%
North East	31,620	30,180	32,455	3%
North West	100,100	106,050	109,300	9%
Scotland	87,065	85,460	82,255	-6%
South East	131,875	147,250	131,000	-1%
South West	62,925	63,950	66,645	6%
Wales	29,575	28,175	29,825	1%
West Midlands	65,050	64,600	82,650	27%
Yorkshire and Humber	65,825	55,600	65,320	-1%

Source NOMIS Business Register and Employment Survey (ONS 2018)

12.4 Workforce characteristics

Table 30 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 Financial managers and directors
Professional Occupations	Environmental professionals
Administrative, Clerical and Secretarial Occupations	Administrative roles Office manager
Skilled Trades Occupations	Gardeners and landscape gardeners Groundsmen and greenkeepers
Caring, Leisure and Other Service Occupations	Cleaning and housekeeping managers and supervisors Caretakers Housekeepers and related occupations Pest control officers
Process, Plant and Machine Operatives	Large goods vehicle drivers
Elementary Occupations	Cleaning operatives and domestics Window cleaners Industrial cleaning process occupations Street cleaners Refuse and salvage occupations

Table 31 Age of workforce (%)

Sub-Industry	Under 25	25 to 34	35 to 44	45 to 54	55 to 64	65+
Cleaning Activities	8%	17%	18%	31%	23%	3%
Facilities Management	5%	21%	18%	27%	18%	10%
Landscape Service Activities	11%	21%	25%	22%	16%	5%
Waste and Resource Management Industry	6%	20%	15%	35%	22%	1%
All Cleaning Industry	8%	19%	19%	29%	21%	5%
All sectors	12%	23%	22%	24%	16%	4%

Source Labour Force Survey Apr-June 2018 (Office for National Statistics, Social Survey Division, Northern Ireland Statistics and Research Agency, Central Survey Unit 2018)

Table 32 Country of birth (%)

Sub-Industry	UK	Europe	Other
Cleaning Activities	72%	16%	12%
Facilities Management	85%	7%	8%
Landscape Service Activities	94%	2%	4%
Waste and Resource Management Industry	90%	4%	6%
All Cleaning Industry	**81%**	**10%**	**9%**
All sectors	**83%**	**8%**	**9%**

Source Labour Force Survey Apr-June 2018 (Office for National Statistics, Social Survey Division, Northern Ireland Statistics and Research Agency, Central Survey Unit 2018)

Table 33 Proportion of workforce who are born outside of the UK by region

Nation / Region	Industry	All sector
Scotland	12%	10%
Wales	11%	8%
Northern Ireland	20%	10%
East	13%	15%
East Midlands	13%	16%
London	53%	39%
North East	9%	7%
North West	7%	10%
South East	12%	18%
South West	14%	11%
West Midlands	23%	16%
Yorkshire and The Humber	13%	12%

Source Labour Force Survey Apr-June 2018 (Office for National Statistics, Social Survey Division, Northern Ireland Statistics and Research Agency, Central Survey Unit 2018)

12.5 Pay

Table 34 Hourly paid for employees by industry, 2018

Sub-Industry	SIC	Definition	Number of jobs	Average Pay	Annual % change	Pay Range
Cleaning Activities	81.21	General cleaning of buildings	51,000	£8.75	-7.50%	£7.83 to £11.06
	81.22	Other building and industrial cleaning activities	6,000	£10.27	5.20%	£8.50 to £11.27
	81.29	Other cleaning activities	19,000	£10.68	2.20%	£7.94 to £14.82
Facilities Management	68.32	Management of real estate on a fee or contract basis	55,000	£13.64	-0.40%	£8.94 to £21.12
	77.33	Renting and leasing of office machinery and equipment	*	*	*	*
	81.10	Combined facilities support activities	101,000	£12.65	-2.20%	£8.38 to £18.47
Landscape Service Activities	81.30	Landscape service activities	31,000	£10.15	6.70%	£7.84 to £13.29
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	54,000	£11.82	2.47%	£8.54 to £17.08
	38.12	Collection of hazardous waste	*	*	*	*
	38.21	Treatment and disposal of non-hazardous waste	13,000	£12.71	12.20%	£8.00 to £15.93
	38.22	Treatment and disposal of hazardous waste	*	£21.75	11.50%	*

Source Annual Survey of Hours and Earnings 2018 Provisional (ONS 2018)

Table 35 Hourly pay and paid hours worked averages for key occupations, 2018

	Full time employee jobs				Part time employee jobs			
	Number of jobs	**Average Pay**	**Annual % Change (pay)**	**Average hrs worked**	**Number of jobs**	**Average Pay**	**Annual % Change (pay)**	**Average hrs worked**
1251 Property, housing and estate managers	96,000	£17.49	2.1%	37.5	13,000	£14.52	-0.2%	20.0
1255 Waste disposal and environmental services managers	*	£20.39	6.9%	37.5	*	*	*	*
5113 Gardeners and landscape gardeners	33,000	£10.33	3.9%	37.5	9,000	£9.02	7.5%	16.9
5114 Groundsmen and greenkeepers	41,000	£9.50	3.2%	39.1	*	£8.06	-2.9%	*
5319 Construction and building trades n.e.c.	29,000	£12.46	5.9%	40.0	*	£9.77	6.7%	17.6
6132 Pest control officers	*	£11.84	10.6%	37.0	*	*	*	*
6240 Cleaning and housekeeping managers and supervisors	26,000	£9.51	1.4%	39.9	21,000	£8.55	0.6%	18.6
8211 Large goods vehicle drivers	203,000	£11.74	3.1%	44.8	13,000	£10.43	1.5%	23.9
9132 Industrial cleaning process occupations	12,000	£9.00	4.5%	39.7	4,000	£7.99	6.6%	*
9231 Window cleaners	*	£9.76	8.3%	39.4	*	£7.83	0	25.0
9232 Street cleaners	5,000	£9.71	6.0%	37.0	*	£8.75	16.7%	*
9233 Cleaners and domestics	121,000	£8.42	4.6%	37.5	437,000	£8.10	3.8%	14.9
9235 Refuse and salvage occupations	18,000	£9.66	1.9%	37.0	*	£7.85	-1.6%	18.3
All occupations	18,899,000	£14.37	2.7%	37.5	7,518,000	£9.35	2.8%	18.1

Source Annual Survey of Hours and Earnings 2018 Provisional (ONS 2018) * data unavailable

12.6 Future Requirement

Table 36 Changing composition of employment by occupation in Waste Management (000s) (SIC 38 & 39)

	2014 employment	2024 employment	Employment Change	Replacement demand	Total requirement
1. Managers and Senior Officials	17	20	3	7	10
2. Professional Occupations	11	13	2	4	6
3. Associate Professional and Technical Occupations	16	17	2	5	7
4. Administrative, Clerical and Secretarial Occupations	11	10	-1	4	3
5. Skilled Trades Occupations	15	17	3	6	9
6. Personal Service Occupations	3	3	1	1	2
7. Sales and Customer Service Occupations	3	3	0	1	1
8. Transport and Machine Operatives	36	38	2	15	16
9. Elementary Occupations	29	27	-2	9	8
Total	**139**	**148**	**9**	**53**	**62**

Source Working Future VI

Table 37 Changing composition of employment by occupation in Services to building (000s) (SIC 81)

	2014 employment	2024 employment	Employment Change	Replacement demand	Total requirement
1. Managers and Senior Officials	87	100	14	40	54
2. Professional Occupations	93	117	24	41	65
3. Associate Professional and Technical Occupations	135	158	23	55	78
4. Administrative, Clerical and Secretarial Occupations	126	120	-7	56	50
5. Skilled Trades Occupations	30	35	5	13	18
6. Personal Service Occupations	85	112	27	42	69
7. Sales and Customer Service Occupations	52	58	6	19	25
8. Transport and Machine Operatives	18	19	1	7	9
9. Elementary Occupations	257	250	-7	108	100
Total	884	968	84	383	467

Source Working Future VI

About The British Cleaning Council

Established in 1982, the British Cleaning Council (BCC) is the authoritative voice of UK cleaning, a sector worth over £24bn a year to the country's economy and one which employs over 700,000 people.

The Council's membership is made up of over 20 trade and membership associations which are all linked to the cleaning and hygiene professions.

From contract cleaning to waste management, pest control to housekeeping, training providers to machine manufacturers, chemical suppliers to wheelie-bin washers – the BCC coordinates, campaigns and supports the affairs of the whole of the UK's cleaning industry.

Key priorities for the BCC and its membership include raising professional standards, employee health and wellbeing, career development and training, improved quality control and better procurement practices. They are also committed to promoting higher levels of cleaning and hygiene across all environments – commercial, domestic and public.

Along with Quartz Business Media, the British Cleaning Council also manage the world-renowned Cleaning Show. This flagship industry expo, which alternates annually between the ExCel Centre in London and Event City in Manchester, is a showcase for the latest developments and innovations in UK cleaning as well as providing a forum to discuss and debate major issues which impact on the whole sector.

Proceeds from The Cleaning Show are reinvested by the BCC back into the cleaning industry in the form of research, grants, consultation services, campaigns and generating positive publicity for the sector.

More information at www.britishcleaningcouncil.org

BRITISH CLEANING COUNCIL
bcc
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Association of Building Cleaning
Direct Service Providers

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PURGARE
BICSc
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BPCA
British Pest
Control
Association

The
Business Services
Association

CIWM

CSSA
CLEANING & SUPPORT SERVICES ASSOCIATION

DCA
Domestic
Cleaning
Alliance

NCCA
NATIONAL CARPET CLEANERS ASSOCIATION
CLEANING THE NATION'S CARPETS AND UPHOLSTERY

ukcpi
UK Cleaning Products Industry Association

UKHA
UK HOUSEKEEPERS
ASSOCIATION

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BRITAIN
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The National Association of Wheeled Bin Washers

Worshipful Company of
Environmental Cleaners

All data shown in tables and charts are the result of modelling by Firedog market research based on Standard Industry Classification (SIC) Codes on behalf of the British Cleaning Council.

All modelling and calculation results presented here are based on national statistics. Any subsequent revision or updates of such national data will affect the assessments and projections shown.

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BRITISH CLEANING COUNCIL

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