BRITISH CLEANING COUNCIL

THE CLEANING, HYGIENE AND WASTE INDUSTRY

RESEARCH REPORT

2022

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British Cleaning Council

The Cleaning, Hygiene and Waste Industry

Research Report 2022

By

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Executive Summary

<u>1.47 million = 5% = £58.9bn = top ten UK industry</u>

Pandemic response

The cleaning industry provides a vital service to the economy, ensuring that our workplaces, hospitals, schools, transport facilities and public spaces are clean and pleasant to use. The role of the sector's personnel is frontline and essential to keeping key workers and the public healthy, safe and well.

We pay tribute to the cleaning and hygiene operatives who have been frontline workers in the fight against the Covid-19 pandemic, working quietly, efficiently, bravely and skilfully to protect the health of others and keep key industries going. This vital role has helped to highlight the importance of the sector. Once a service that was kept behind the scenes, cleaning in public spaces is now proving to be the key factor in regaining consumer confidence.

In the current workforce, many cleaning and hygiene personnel are mentally and physically exhausted from the demands of responding to the pandemic – particularly those in the healthcare environment. Employee welfare has been catapulted to the top of the HR agenda for business leaders, with organisations offering more welfare support. Businesses have become more innovative with different ways to try and support their staff.

Size and turnover

The industry directly employs over 941,000, this is 2% less than the previous year. If occupations involved in cleaning across other industries such as public services and hospitality are included, the total number of individuals working in the industry can be expressed as 1.47 million. This equates to approximately 5% of the UK workforce. The cleaning industry is a top ten employment industry in the UK.

In 2019, the industry contributed nearly £58.9 billion to the economy, up from £57.3bn in 2018. All subsectors, bar landscape service activities, saw a year-on-year growth in turnover.

The sector continues to grow, with a reported 69,005 businesses operating in 2021, up from nearly 66,420 in 2020. Stakeholder interviews reported seeing opportunistic firms starting up during the pandemic offering cleaning services. Many member organisations also reported a greater interest in firms joining.

The cleaning and hygiene industry is quite competitive with both small and medium companies. Nearly nine in ten (88%) are micro businesses, employing less than ten individuals and 99% of businesses are private firms.

Challenges

The variety of roles in the industry is endless and the ability to progress once in the industry is immense. Yet the industry is struggling to recruit. Staff have not come back to the industry following furlough, EU and Eastern European staff went home and have not returned following Brexit while other workers have upscaled to new roles, creating a perfect storm of severe staff shortages in the industry. There are a record number of job vacancies across the UK across a variety of industries, adding to the recruitment challenge. Employers in the cleaning sector need to adapt to a rapidly changing workforce if they are to win the 'frantic' battle for workers.

The part-time working opportunities that the industry has to offer can be an advantage to many. However, only 9% of people working in the industry are aged under 25 and 27% are aged over 55 years. This suggests the sector may face issues around an ageing workforce and the industry needs to do more to attract younger workers into the sector. Continuing to raise the profile of the industry is vital to attract workers.

With regards to training, good headway has been made with the proposal for a Cleaning Hygiene Operative apprenticeship. However greater flexibility around the Levy would be welcomed in the sector to, for example, incentivise more flexible training, or by allowing businesses to buy training modules with their Levy funds that better meet their needs, not just full qualifications. This would aid the industry in which the current apprenticeship offer is limited.

It is almost a year since the All-Party Parliamentary Group (APPG) for the Cleaning and Hygiene Industry was established. Whilst traction has been seen in the Apprenticeship Levy/Trailblazer group, there has not been the same level of urgency and drive in relation to the main areas of industry strategy and hygienic requirement that had been commenced upon. This includes:

- Protection and recognition of the role of cleaning and hygiene operatives and personnel as being in an essential and key occupation.
- Recognition that cleaning and hygiene is both critical and essential in restoring the confidence of the nation in returning to work and normality, thus aiding the UK economy to recover.
- Being fully committed to the adoption and recognition of the Apprenticeship Levy as a universal training and accreditation in cleaning and hygiene across the UK.

1 Introduction

1.1 British Cleaning Council

The British Cleaning Council (BCC) is the voice of the UK cleaning and hygiene industry. It was established in 1982 to coordinate the affairs of the industry and to be responsible at home 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 22 members, which cover every facet of the nearly £59 billion UK cleaning and hygiene 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 and hygiene industry.

1.2 Cleaning and Hygiene Industry

This report builds upon the 2021 research report.

The cleaning and hygiene 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)

1.3 Purpose of the report

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

2 Economic landscape

After a tough 2020, the UK economy rebounded last year with growth of 7.5% in 2021, following a 9.4% fall in 2020. This growth was despite the Omicron restrictions in December 2021 (ONS 2022). It was also the highest growth of the G7 major economies, indicating a strong bounceback. Looking forward the IMF and OECD both expect the UK 2022 GDP growth forecast to be 4.7% (UK Parliment 2022).

As a service industry, the cleaning and hygiene industry, is directly impacted by the operating of other sectors. It provides a vital service to us all ensuring our workplaces, hospitals, schools, transport and public spaces are clean, safe and pleasant to use. Latest data shows that the Service sector output is now 0.5% above pre-coronavirus (COVID-19) levels (ONS 2022).

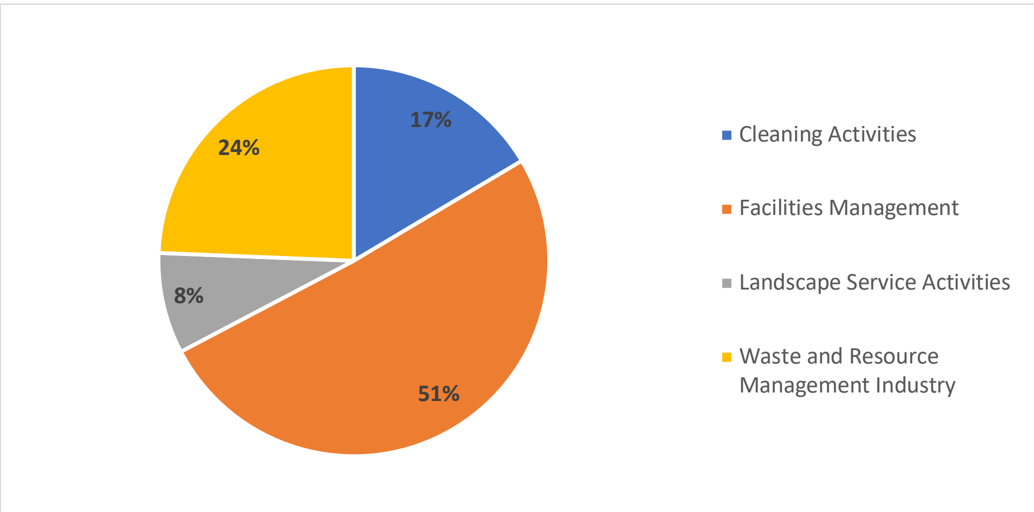
2.1 Sector turnover

The industry contributed nearly £58.9bn to the economy in 2019, up from £57.3bn in 2018 – the 2020 data is yet to be released.

Turnover has increased by 22% since 2015, similar to the all economy growth in which turnover increased by 22% (ONS 2021).

51% of the industry turnover was from facilities management, while waste and resource management contributed 24%, cleaning activities 17% and landscape services 8% (Figure 1).

Figure 1 Turnover by subindustry



Source Annual Business Survey – 2019 Results (ONS 2021)

2.2 Businesses

2.2.1 Number and size

The cleaning and hygiene industry is quite competitive, with both small and medium companies competing for the same pie as established franchises. This is partly because entry barriers to the sector have traditionally been quite low. Equipment requirement was seen as minimal in the past and employees entering the industry were given a non-uniform and undefined level of training, dependent on their employer. Whilst this has significantly changed over the last decade, the uniformity and recognised accreditation has still not had government approval, which is another element of change being pursued by the British Cleaning Council in its training & professionalism strategy with the All Party Parliamentary Group.

Many companies now outsource cleaning and similar services, such as security or catering, to specialist companies, as a way to reduce costs. This has led to significant expansion in the industry.

The industry has seen a year-on-year increase since 2010 when 45,970 companies were in operation, to today, where more than 69,005 businesses operate (ONS 2021).

In terms of growth there have been some significant differences across the nations and regions over the last year. In England and Northern Ireland business numbers increased by 4% between 2020 and 2021, 3% in Scotland and 1% in Wales. The East of England, London, and West Midlands all saw an increase of 5%, while all other regions increased by 2-4% (see annex Table 33).

Nearly nine in ten (88%) are micro businesses, employing less than 10 individuals. 99% of businesses are private companies (see annex Table 34 and Table 35).

2.2.2 Start-ups, closures and survival rates

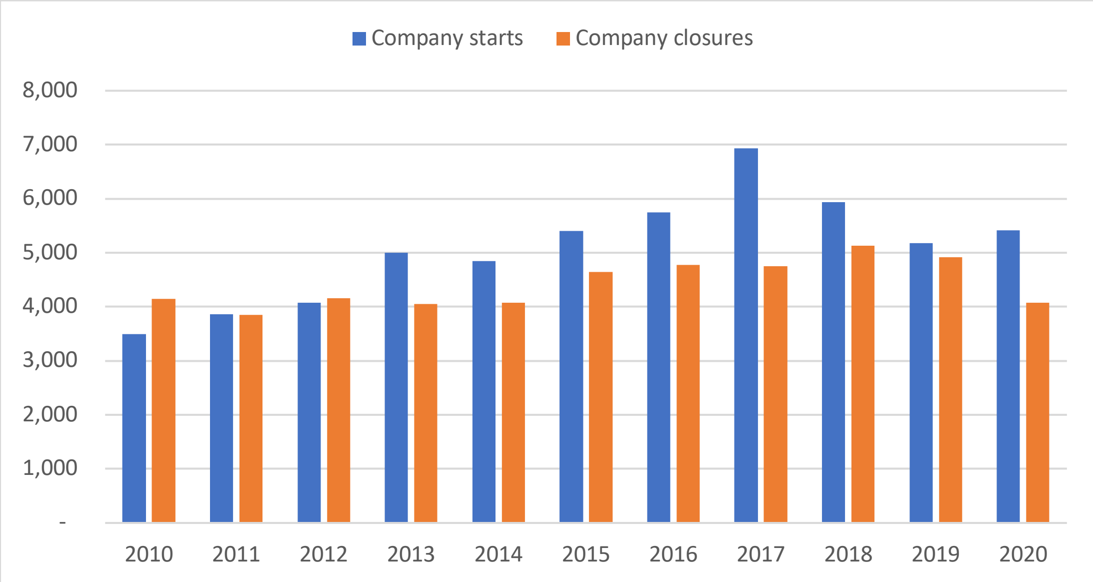
The number of new businesses in the cleaning and hygiene industry increased by 4% from 5,185 to 5,415 between 2019 and 2020. This was in contrast to the all-sector data in which the number of new businesses decreased by 8% from 390,230 to 357,725 (ONS 2021).

Stakeholder interviews reported seeing opportunistic firms starting up during the pandemic offering cleaning services. Many member organisations also reported a greater intertest in firms joining.

During the same period the number of businesses that ceased trading decreased from 4,915 to 4,075 between 2019 and 2020, a decrease of 17%. The UK trend saw the number of closures decreased by 2% in the same period (ONS 2021).

The industry five-year survival rate for businesses born in 2014 and still active in 2018 was 45.3%. This is slightly higher than the UK whole economy rate of 42.5% (ONS 2021).

Figure 2 Company start-ups and closures in the industry, 2010 - 2020



Source Business Demography - 2020 Enterprise Births, Deaths and Survivals (ONS 2021)

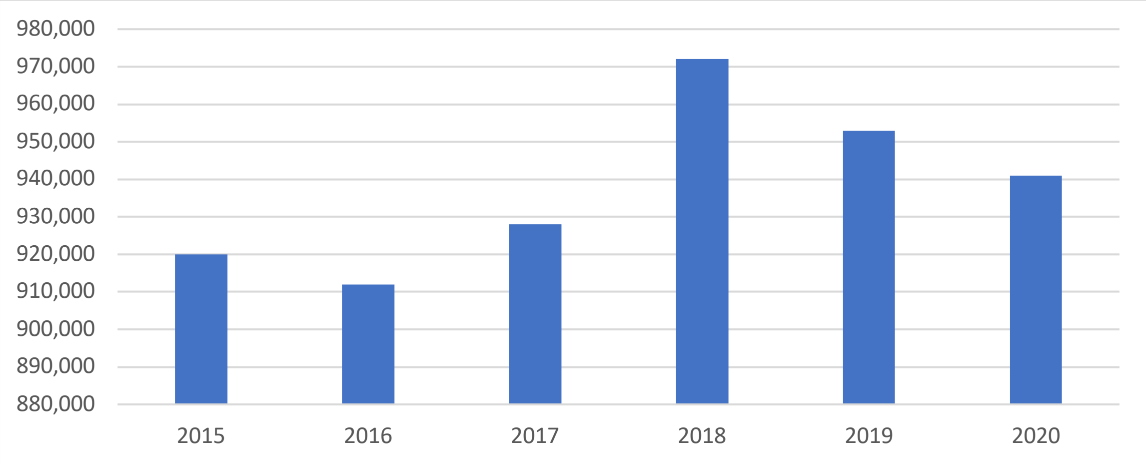
3 Workforce size and characteristics

3.1 Number employed

The industry directly employs over 941,000 individuals across Great Britain.

Overall employment has increased % between 2015 and 2020. This employment growth is in line with the whole economy which recorded a 2% growth in the same period. However, employment in the industry has been falling since 2018.

Figure 3 Change in employment numbers, GB 2015-2020



Source Business Register and Employment Survey (ONS 2021)

Industry employment growth rate has varied across the regions between 2019 and 2020 (see annex Table 40). The West Midlands experienced greatest growth at 14% but the South East, East Midlands, Wales, North West, London and Yorkshire and Humber all saw numbers employed in the industry decrease.

3.2 Wider employment

Using just the SIC definition determined how many were employed directly in the industry. However, although a number of occupations are essentially considered cleaning industry roles, such as cleaning and housekeeping managers, domestic cleaning and hygiene operatives, these occupations are also evident across other industries, including public services and hospitality.

Taking a wider view, the number of individuals working in the industry can be expressed as around 1.47 million, which equates to approximately 5% of the UK workforce (Table 41). The cleaning and hygiene industry therefore can be considered a top 10 UK employment industry.

'Other Occupations' include roles such as Human Resources, Accountancy, Sales Accounts and Business Development Managers, Health and Safety Officers and Large Goods Vehicle drivers.

Table 2 Broad definition of employment in cleaning and hygiene industry

Industry Occupations	**Employment**		**Total**	
	Cleaning Industry	**All Other Industries**	**Number**	**%**
Property, housing and estate managers	28,000	131,200	159,100	11%
Waste disposal and environmental services managers	500	13,800	14,300	1%
Gardeners and landscape gardeners	109,200	45,300	154,500	11%
Pest control officers	9,400	2,200	11,700	1%
Housekeepers and related occupations	2,200	41,800	44,000	3%
Caretakers	4,900	55,100	60,000	4%
Cleaning and housekeeping managers and supervisors	24,000	41,700	65,800	4%
Industrial cleaning process occupations	115,700	152,300	268,000	18%
Window cleaning and hygiene operatives	35,900	1,600	37,500	3%
Street cleaners and hygiene operatives	8,300	1,500	10,000	1%
Cleaning and hygiene operatives and domestics	130,800	160,900	291,700	20%
Refuse and salvage occupations	31,900	11,600	43,500	3%
Vehicle valeters and cleaning and hygiene operatives	6,400	20,400	26,800	2%
Elementary cleaning occupations N.E.C.	4,300	11,700	16,000	1%
Other Occupations	266,900		266,900	18%
Total	**778,500**	**691,200**	**1,469,700**	

Source Labour Force Survey Apr – June 2021 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division 2020)
Data rounded to nearest 100, N.E.C. Not elsewhere classified

Table 3 below demonstrates changes in the broader employment numbers between 2019 and 2021.

It indicates a 10% decline in employment numbers over 3 years. The period of employment was for April to June for each year. Therefore, the 2020 and 2021 data could be seeing the impacts of Covid-19. However, Government statisticians are advising caution with the datasets. There is a suggestion that the decreases are a consequence of people not starting new jobs (i.e., there were no new jobs, but you still have had the natural flow of people retiring / leaving roles) compared to similar period in previous years (ONS 2020).

Table 3 Broad definition of employment in the industry 2019-2021

	Employment			Difference
Industry Occupations	**2019**	**2020**	**2021**	**2019-2021**
Property, housing and estate managers	198,900	193,800	159,100	-39,800
Waste disposal and environmental services managers	19,300	15,300	14,300	-5,100
Gardeners and landscape gardeners	183,500	153,300	154,500	-29,000
Pest control officers	13,700	5,700	11,700	-2,000
Housekeepers and related occupations	54,600	51,300	44,000	-10,600
Caretakers	85,200	56,000	60,000	-25,200
Cleaning and housekeeping managers and supervisors	83,500	73,700	65,800	-17,700
Industrial cleaning process occupations	27,800	30,800	268,000	240,200
Window cleaning and hygiene operatives	31,900	27,100	37,500	5,600
Street cleaners and hygiene operatives	9,000	4,800	10,000	900
Cleaning and hygiene operatives and domestics	599,800	511,300	291,700	-308,100
Refuse and salvage occupations	37,100	26,600	43,500	6,400
Vehicle valeters and cleaning and hygiene operatives	32,800	28,000	26,800	-6,000
Elementary cleaning occupations N.E.C.	4,600	5,700	16,000	11,500
Other Occupations	253,300	288,400	266,900	13,622
Total	**1,635,000**	**1,471,600**	**1,469,700**	**-165,300**

Source Labour Force Survey Apr – June 2019 & 2020 & 2021

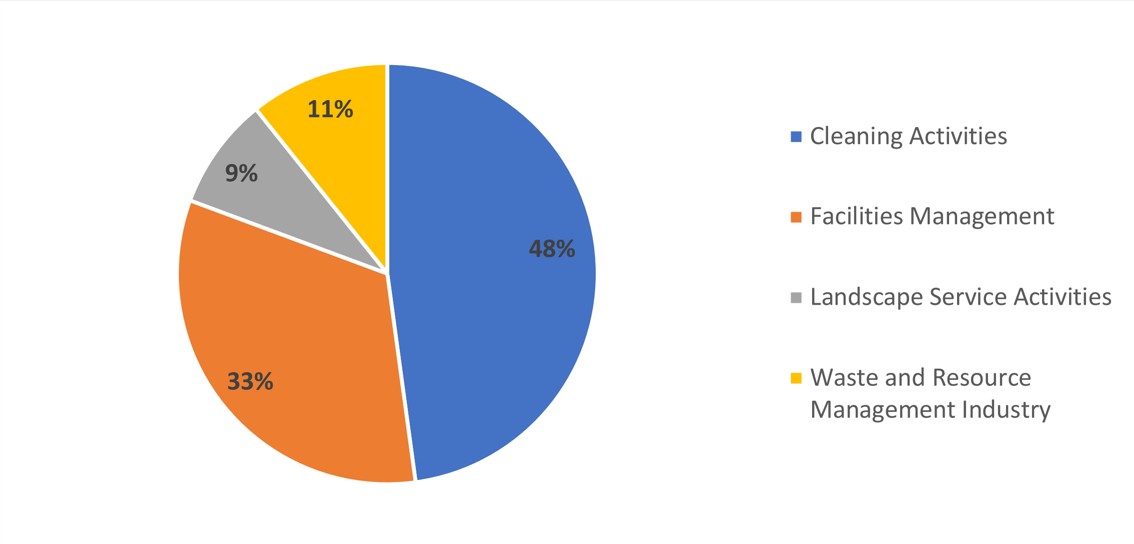
Data rounded to nearest 100, N.E.C. Not elsewhere classified

3.3 Employment by sub-industry

While facilities management accounts for 51% of the industry turnover, only 33% of the employment is within this sub-industry.

Cleaning and hygiene activities accounts for nearly half (48%) of all employment, with waste and resource management accounting for a further 11%.

Figure 4 Employment by subindustry, 2020



Source Business Register and Employment Survey (ONS 2021)

3.4 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.

3.4.1 Occupational breakdown

The majority (45%) of workers are employed in elementary roles. This is significantly higher than the proportion seen across all UK sectors (Table 4). A further fifth (17%) are skilled trades personnel. The industry employs a significantly lower proportion of professional occupations in comparison to all UK sectors.

Table 4 Occupational profile

	Cleaning Industry	**All sectors**
Managers, Directors and Senior Officials	10%	10%
Professional Occupations	5%	25%
Associate Professional and Technical Occupations	4%	15%
Administrative and Secretarial Occupations	7%	11%
Skilled Trades Occupations	17%	9%
Caring, Leisure and Other Service Occupations	6%	8%
Sales and Customer Service Occupations	1%	7%
Process, Plant and Machine Operatives	5%	6%
Elementary Occupations	45%	9%

Source Labour Force Survey Apr – June 2021

3.4.2 Key occupations

Given that 45% of the workforce falls within elementary occupations, it is of little surprise that cleaning and hygiene operatives and domestics, industrial cleaning occupations, window cleaning and hygiene operatives and refuse and salvage roles (all of which fall into the elementary occupations category) are all in the top five occupations. Gardeners and landscape gardeners (a skilled trade) account for a further 15% of the workforce.

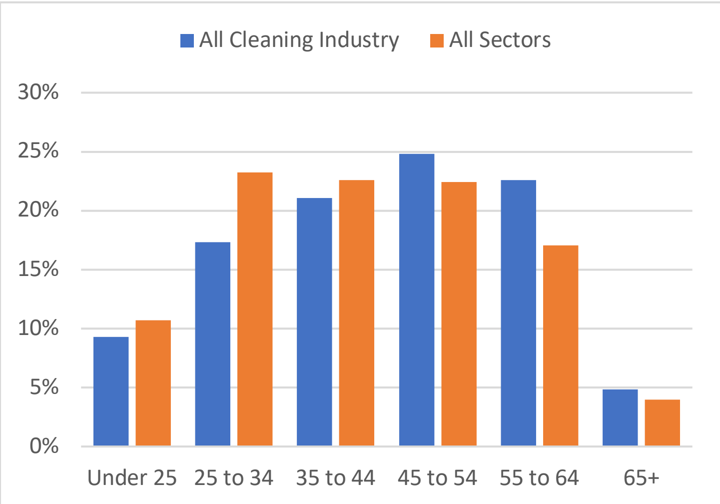
Table 5 Top ten occupational roles in the cleaning industry

Rank	Occupation (SOC)	Number	% workforce
1	Cleaners and hygiene operatives and domestics	130,800	17%
2	Industrial cleaning process occupations	115,700	15%
3	Gardeners and landscape gardeners	109,200	14%
4	Window cleaning and hygiene operatives	35,900	5%
5	Refuse and salvage occupations	31,900	4%
6	Property, housing and estate managers	28,800	4%
7	Cleaning and housekeeping managers and supervisors	24,000	3%
8	Large goods vehicle drivers	20,700	3%
9	Book-keepers, payroll managers and wages clerks	12,000	2%
10	Financial managers and directors	11,300	1%
	Other occupations	519,400	67%
	Total	777,500	

Source Labour Force Survey Apr – June 2021 (*N.E.C. = Not elsewhere classified)

3.4.3 Age

Figure 5 Age profile of the industry



Source Labour Force Survey Apr – June 2021

The vast majority of the workforce are aged between 25 and 54 (63%).

The proportion of staff under 25 in the industry is lower than seen across all economy (9% v 11%). In contrast the proportion of staff aged over 55 (27%) is higher (21%) suggesting that that the sector may face issues around an ageing workforce.

3.4.4 Gender

Across the industry there is a slightly greater proportion of female workers – 56% compared to 44% male. However, when looking closely at the sub-industries there are noticeable differences (Table 6). For example, the waste and resource management sub-industry and landscape service activities are both dominated by male workers.

The data also reveals a shift in the proportion of male workers in cleaning activities. In 2020 31% of the workforce were male, but this increased to 44% in 2021.

Table 6 Gender within the cleaning industry

	2020		2021	
	% male	**% female**	**% male**	**% female**
Cleaning Activities	31%	69%	44%	56%
Facilities Management	56%	44%	52%	48%
Landscape Service Activities	82%	18%	79%	21%
Waste and Resource Management Industry	84%	16%	88%	12%
Cleaning Industry	**53%**	**47%**	**44%**	**56%**
All Sectors	**52%**	**48%**	**52%**	**48%**

Source Labour Force Survey Apr – June 2020 & 2021

There are also further differences in gender across occupational groups (Table 7).

The proportion of women working in professional occupations is considerably lower in the cleaning industry compared to the whole economy (31% compared to 49%).

Table 7 Occupational profile by gender

	Cleaning Industry		All sectors	
	% Male	**% Female**	**% Male**	**% Female**
Managers and Senior Officials	62%	38%	63%	37%
Professional Occupations	69%	31%	51%	49%
Associate Professional and Technical Occupations	51%	49%	49%	51%
Administrative, Clerical and Secretarial Occupations	22%	78%	28%	72%
Skilled Trades Occupations	83%	17%	89%	11%
Personal Service Occupations	56%	44%	20%	80%
Sales and Customer Service Occupations	42%	58%	41%	59%
Transport and Machine Operatives	91%	9%	87%	13%
Elementary Occupations	50%	50%	55%	48%

Source Labour Force Survey Apr – June 2021

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 and hygiene operatives and domestic workers are female, while less than 1% of street cleaners are female. Nearly all of those in refuse and salvage occupations are male and 81% of gardeners or landscape gardeners are also male (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division. 2021).

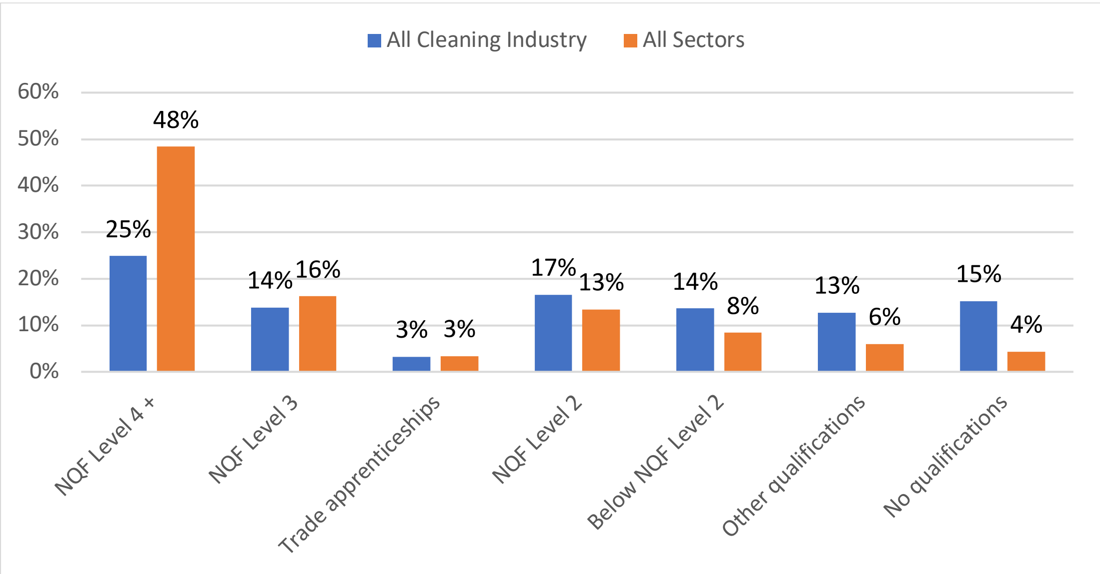
3.4.5 Qualification levels

Workers in the industry hold significantly lower levels of qualifications.

42% of the workforce do not hold a level 2 compared to just 19% across the economy. The industry also has significantly lower proportion holding level 4 qualifications (22% v 48%).

This is reflective of the occupational profile, in which nearly half of the workforce is within elementary positions, where skills requirements have previously been regarded as not that complex. That view has hopefully now been eradicated given the work of cleaning and hygiene operatives throughout the pandemic.

Figure 6 Qualification levels



Source Labour Force Survey Apr – June 2021

3.4.6 Migrants

The number of foreign-born people working in the industry accounts for 21% of the workforce. This is greater than all sector figure where 18% of the workforce are foreign born.

There is variation across the nations/regions. For example, in London 60% of the industry workforce were born overseas while in the North East 4% of the workforce were (see Annex Table 45).

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). The British Cleaning Council expects that position to change in future due to the work of the All Party Parliamentary Group and the industry, which are supporting the introduction of a recognised uniform qualification and training accreditation.

4 Working hours and pay in the industry

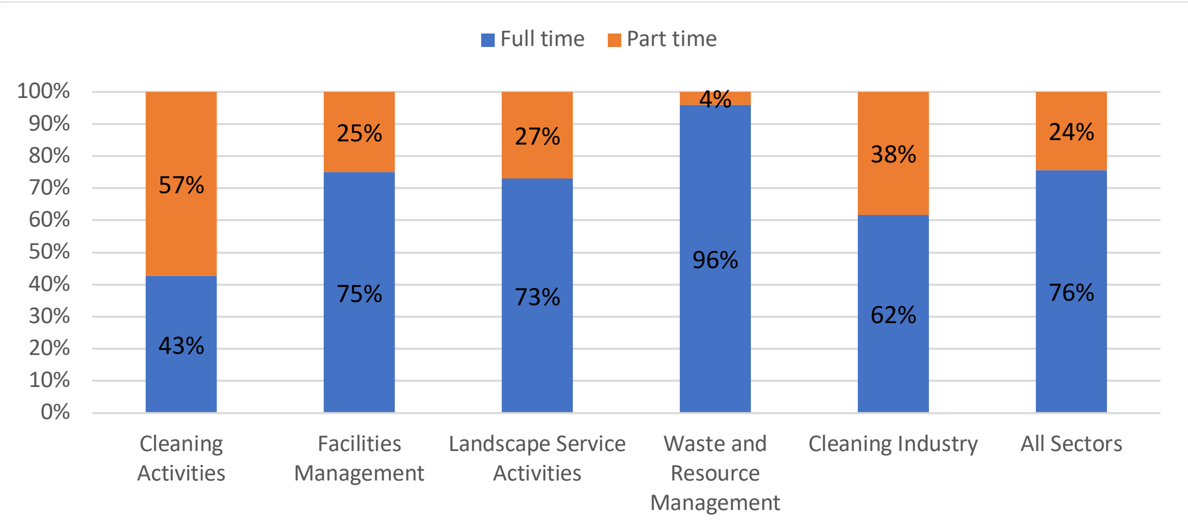
4.1 Flexible working

Many people may view the industry, and cleaning and hygiene 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. The essential nature of the industry's work has never been appreciated more than during the pandemic.

Across the industry, full-time workers account for 62% of the workforce. However, there are notable differences across the sub-industries (Figure 7). Three in five (57%) of workers in the 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 with a family or with caring responsibilities.

Figure 7 Working patterns



Source Labour Force Survey Apr – June 2021

4.2 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 it hopes to achieve this. It does, however, impact on companies in the industry in which staff costs accounts for a significant proportion of company resources.

The National Living Wage, which sets out what 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.

From 1 April 2021 the National Living Wage will apply to anyone aged 23 and over.

Table 8 Wage rates

	National Living Wage					London Living Wage*	UK Living Wage*
	23 and over	21 to 22	18 to 20	Under 18	Apprentice		
April 2021	£8.91	£8.36	£6.56	£4.62	£4.30	£11.05	£9.90
April 2022	£9.50	£9.18	£6.83	£4.81	£4.81	*	*

Source (GOV.UK 2021) * not available

4.2.1 Pay by sub-industry

The latest Office for National Statistics data allows us to investigate average pay by industry.

The average hourly wage for a full-time worker across the sub-industries in April 2021 is shown below. All sub-industries, bar cleaning activities, saw an increase in average hourly wage between 2020 and 2021.

Table 9 Average hourly paid for FT employees by industry

SIC	Definition	2017	2018	2019	2020	2021	Annual % change
81.2	Cleaning Activities	£9.57	£9.18	£9.81	£10.50	£10.21	-3.1%
81.1	Combined facilities support activities	£12.94	£13.18	£13.43	£13.82	£14.75	5.4%
81.3	Landscape Service Activities	£9.51	£10.16	£10.40	£10.54	£11.25	8.6%
38.0	Waste collection, treatment and disposal activities; materials recovery	£11.73	£12.09	£13.10	£12.75	£13.03	3.0%
	All employees	£14.00	£14.37	£14.90	£15.14	£15.65	3.3%

Source Annual Survey of Hours and Earnings 2021 Provisional (ONS 2021)

Stakeholders mentioned difficulties in recruiting. To meet demand for staff, firms may need to increase pay offers and benefits to secure staff. Those using agencies to supply staff reported substantial increases in fees.

5 Sub-industries

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

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

5.1 Cleaning and hygiene activities

Cleaning and hygiene activities include the 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 and 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).

5.1.1 Market value

Cleaning and hygiene activities contributed over £9.7bn to the economy in 2019. Turnover has increased 30% since 2015, which is greater than all economy growth in which turnover increased by 22% (ONS 2021).

All three activities saw growth:

- General cleaning of buildings generated turnover of nearly £6.5bn (66% of the total), which increased 23% since 2015.
- Other building and industrial cleaning activities saw the largest increase in turnover of 54% in the same time period and generated over £1bn.
- Other cleaning activities saw the increase in turnover (44%) since 2015. It accounted for 21% of the sub-industry total at over £2.2bn.

5.1.2 Businesses and the workforce

There are 22,570 businesses in this sub-industry, which accounts for a third (33%) of all businesses in the cleaning and hygiene industry. 56% are involved in the general cleaning of buildings (see annex Table 32). 81% of businesses are micro, employing less than 10 people.

In 2020, 2,830 new businesses started up in this sub-industry. This was an increase on the previous year which saw 2,560 new openings. The sub-industry saw 2,150 businesses stop trading in 2020. Meaning that there was a net increase in businesses. The 5-year survival rate of companies in this sub-industry is 42.9%, which is greater than all businesses (39.6%).

450,000 individuals work in the cleaning and hygiene activities sub-industry (ONS 2021). This is an increase of 1% over the last year. The majority (82%) of the workforce are employed within the activity of general cleaning of buildings.

The top four occupations are:

- Cleaning and hygiene operatives and domestic workers, accounting for 34% of the workforce.
- Industrial cleaning process occupations– 30% of the workforce.
- Window cleaning and hygiene operatives - 10% of the workforce.
- Cleaning and housekeeping managers and supervisors – 6% of the workforce.

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

- The dominance of female workers (66%) 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 79% of this sub-industry workforce is within elementary positions, where the skills required have previously and pre-pandemic been seen as not that complex. Just 5% working in the sub-industry are managerial or senior officials.
- Migrant workers account for a third (35%) of workers in the general cleaning of buildings, compared to just 18% across entire UK workforce.

Table 10 Workforce characteristics in key groups of cleaning and hygiene activities

		General cleaning of buildings	Other building and industrial cleaning activities	Other cleaning activities	Total Cleaning Activities
Gender	Male	34%	84%	54%	**44%**
	Female	66%	16%	46%	**56%**
Age	Under 25	8%	9%	9%	**9%**
	25 – 54 yrs.	64%	52%	65%	**62%**
	55 + yrs.	27%	39%	26%	**29%**
	Full-time	37%	57%	61%	**43%**
	Part-time	63%	43%	39%	**57%**
Qualifications	Below L2	56%	57%	41%	**54%**
	Level 2 & 3	28%	34%	39%	**30%**
	Level 4+	16%	8%	20%	**16%**
Migrants	UK Born	65%	86%	83%	**71%**
	Overseas	35%	14%	17%	**29%**

Source Labour Force Survey Apr-June 2021

Table 11 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%	6%	8%	**5%**	**10%**
Professional Occupations	<1%	1%	2%	**<1%**	**25%**
Associate Professional and Technical Occupations	<1%	3%	3%	**1%**	**15%**
Administrative and Secretarial Occupations	3%	5%	3%	**3%**	**11%**
Skilled Trades Occupations	<1%	<1%	1%	**<1%**	**9%**
Caring, Leisure and Other Service Occupations	8%	6%	21%	**9%**	**8%**
Sales and Customer Service Occupations	<1%	<1%	5%	**1%**	**7%**
Process, Plant and Machine Operatives	1%	<1%	4%	**1%**	**6%**
Elementary Occupations	83%	80%	54%	**79%**	**9%**

Source Labour Force Survey Apr-June 2021

5.2 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 that 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 and hygiene.
- 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).

5.2.1 Market value

In 2019, the UK FM industry had a turnover of over £30bn, up from £24.7bn in 2015 – a 22% increase. This is the same as the overall economy growth in which turnover increased by 22% in the same period (ONS 2021).

All three activities saw growth:

- Management of real estate on a fee or contract basis generated turnover of nearly £13.4bn (44% of the sub-industry the total) in 2019. This activity saw an increase in turnover of 18% since 2015.
- Renting and leasing of office machinery and equipment saw turnover increase by 16% between 2015 and 2019. Turnover stood at £653m.
- Combined facilities support activities saw an increase in turnover of 25% since 2015. It accounted for 50% of the sub-industry total at £16bn.

5.2.2 Businesses and the workforce

There are 21,910 businesses in this sub-industry, which accounts for a third (32%) of all businesses in the cleaning industry. 81% are involved in the management of real estate on a fee or contract basis (see annex Table 32). 91% of businesses are micro, employing less than 10 people.

308,500 individuals work in the FM sub-industry. This is an increase of 1% over the last year. The majority (65%) of the workforce are employed within combined facilities support activities, with a further third (34%) working within the management of real estate.

The top four occupations in the sub-industry are:

- Property, housing and estate managers, accounting for 18% of the workforce.
- Bookkeepers, payroll managers and wages clerks – 5% of the workforce.
- Business and financial project management professionals - 4% of the workforce.
- Chartered surveyors – 3% 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 8% are under the age of 25, but conversely nearly a quarter (24%) are over the age of 55.
- The sub-industry is highly qualified with 50% holding a level 4 or above. This is greater than the cleaning industry average where just 25% hold a level 4 or above qualification. This reflects the occupational profile of the FM workforce, in which 29% are in managerial or senior positions and 19% in professional occupations, where the skills requirements are more complex.

Table 12 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	48%	54%	52%
	Female	52%	46%	48%
Age	Under 25	6%	10%	8%
	25 – 54 yrs.	73%	65%	68%
	55 + yrs.	21%	25%	24%
	Full-time	73%	76%	75%
	Part-time	27%	24%	25%
Qualifications	Below L2	13%	16%	15%
	Level 2 & 3	37%	34%	35%
	Level 4+	50%	49%	50%
Migrants	UK Born	90%	75%	80%
	Overseas	10%	25%	20%

Source Labour Force Survey Apr-June 2021 * data not available for renting and leasing of equipment SIC 77.33.

Table 13 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	38%	24%	**29%**	**10%**
Professional Occupations	25%	15%	**19%**	**25%**
Associate Professional and Technical Occupations	7%	13%	**11%**	**15%**
Administrative and Secretarial Occupations	23%	16%	**18%**	**11%**
Skilled Trades Occupations	2%	9%	**6%**	**9%**
Caring, Leisure and Other Service Occupations	0%	9%	**6%**	**8%**
Sales and Customer Service Occupations	1%	3%	**2%**	**7%**
Process, Plant and Machine Operatives	4%	1%	**2%**	**6%**
Elementary Occupations	<1%	9%	**6%**	**9%**

Source Labour Force Survey Apr-June 2021 * data not available for renting and leasing of equipment SIC 77.33.

5.3 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.

5.3.1 Market value

In 2019, the UK landscape activities had a turnover of £4.9bn, slightly down from the previous year at £5bn but greater than the £3.9bn in 2015 – a 25% increase. This is greater than the all-economy growth in which turnover increased by 22% (ONS 2021).

5.3.2 Businesses and the workforce

There are 20,300 businesses in this sub-industry, which accounts for 29% of all businesses in the cleaning and hygiene industry. Since 2010, the number of businesses operating has increased 24%, from 16,335. 95% of businesses are micro – employing less than 10 people, and fewer than 1% employ more than 50+ individuals.

In 2020, 1,500 new businesses started up in this sub-industry. This was a decrease on the previous year which saw 1,560 new openings. The sub-industry saw 1,135 businesses stop trading in 2020.

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 companies and industry participants.

81,000 individuals work in the landscape activities sub-industry. This sub-industry has seen employment levels decrease 10% between 2019 and 2020. Gardeners and landscape gardeners account for 79% 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. 79% of the workforce are male compared to an UK all sector figure of 52%.
- Over a third (35%) do not hold a level 2 qualification.
- Four in five (79%) work in roles classified as skilled trade occupations.

Table 14 Workforce characteristics across the landscape activities

	%	Landscape activities	All sectors
Gender	Male	79%	52%
	Female	21%	48%
Age	Under 25	10%	11%
	25 – 54 yrs.	57%	68%
	55 + yrs.	33%	21%
	Full-time	73%	76%
	Part-time	27%	24%
Qualifications	Below L2	35%	19%
	Level 2 & 3	38%	33%
	Level 4+	27%	48%
Migrants	UK Born	92%	82%
	Overseas	8%	18%

Source Labour Force Survey Apr-June 2021

Table 15 Occupation profile in landscape activities

	Landscape activities	All sectors
Managers, Directors and Senior Officials	**4%**	**10%**
Professional Occupations	**4%**	**25%**
Associate Professional and Technical Occupations	**2%**	**15%**
Administrative and Secretarial Occupations	**4%**	**11%**
Skilled Trades Occupations	**79%**	**9%**
Caring, Leisure and Other Service Occupations	**1%**	**8%**
Sales and Customer Service Occupations	**6%**	**7%**
Process, Plant and Machine Operatives	**4%**	**6%**
Elementary Occupations	**4%**	**9%**

Source Labour Force Survey Apr-June 2021

5.4 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).

5.4.1 Market value

The waste and resource management sub-industry generated a turnover of over £14bn in 2019. This was an increase of 16% since 2015, which is less than all economy growth in which turnover increased by 22% (ONS 2021).

There was growth across both activities:

- Waste collection contributed 67% of the sub-industry turnover at nearly £9.5bn. This area saw turnover increase by 13% since 2015.
- Waste treatment and disposal accounted for a third (33%) of the sub-industry total turnover, with turnover increasing from nearly £3.8bn to nearly £4.7bn between 2015 and 2019.

5.4.2 Businesses and the workforce

There are 4,220 businesses in this sub-industry, which accounts for 6% of all businesses in the cleaning industry. In this sub-industry, 72% are involved in the collection of waste and 28% in waste treatment and disposal (see annex Table 32).

78% of businesses are micro, employing less than 10 people, and just 1% employ more than 250+ individuals.

In 2020, 555 new businesses started up in this sub-industry. This was a slight increase on the previous year which saw 520 new openings. The sub-industry saw 410 businesses stop trading in 2020. The 5-year survival rate of companies in waste collection is 40% and 39% for waste treatment and disposal, which is in line with the all-businesses rate of 39%.

101,000 individuals work in the waste and resource sub-industry. Employment numbers have decreased 8% between 2019 and 2020. Nearly two thirds (64%) of the workforce are employed within the collection of waste. Treatment and disposal of waste accounts for 36% of the workforce.

The top four occupations in the sub-industry are:

- Refuse and salvage occupations accounting for 33% of the workforce.
- Large goods vehicle drivers - 21% of the workforce.
- Street Cleaners – 5%
- Public services associate professionals – 3% 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.
- The sub-industry has low levels of qualifications, particularly in waste collection. This is reflective of the occupational profile in which 66% of this sub-industry workforce is within elementary positions and process, plant and machine operatives, where skills required are generally thought to be less complex.

Table 16 Workforce characteristics in key groups of waste and resource management

	%	**Waste collection**	**Waste treatment and disposal**	**Total waste and resource management**
Gender	Male	94%	80%	**88%**
	Female	6%	20%	**12%**
Age	Under 25	13%	11%	**12%**
	25 – 54 yrs.	69%	68%	**69%**
	55 + yrs.	17%	22%	**19%**
	Full-time	98%	92%	**96%**
	Part-time	2%	8%	**4%**
Qualifications	Below L2	57%	28%	**45%**
	Level 2 & 3	29%	51%	**38%**
	Level 4+	14%	21%	**17%**
Migrants	UK Born	98%	74%	**88%**
	Overseas	2%	26%	**12%**

Source Labour Force Survey Apr-June 2021

Table 17 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	6%	5%	**6%**	**10%**
Professional Occupations	3%	7%	**5%**	**25%**
Associate Professional and Technical Occupations	3%	11%	**6%**	**15%**
Administrative and Secretarial Occupations	8%	10%	**9%**	**11%**
Skilled Trades Occupations	6%	2%	**4%**	**9%**
Caring, Leisure and Other Service Occupations	2%	0%	**1%**	**8%**
Sales and Customer Service Occupations	1%	0%	**1%**	**7%**
Process, Plant and Machine Operatives	34%	20%	**28%**	**6%**
Elementary Occupations	38%	44%	**40%**	**9%**

Source Labour Force Survey Apr-June 2021

5.4.3 Waste handled

Across England local authorities managed waste[1] increased by 1.3% to 25.9 million tonnes in 2020/21. (Defra 2021). The first national lockdown of the COVID-19 pandemic commenced in March 2020 and local authority waste collection services were heavily disrupted during April to June 2020.

Some local authorities were unable to maintain collections of dry recyclate, some garden waste collections were suspended and there was widespread closure of household waste recycling centres (HWRC). This disruption was due to staff shortages and the introduction of changes to working practice. The national lockdown and rules for the operation of some commercial enterprises had a significant impact on the generation of waste during this period.

Lockdown restrictions eased through the summer and into the autumn of 2020. Local authorities and businesses acclimatised to working under lockdown and the COVID-19 pandemic, and as a result there was less disruption to waste collection operations during the remainder of 2020.

[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.

Around 7.8% of all local authority-managed waste was sent to landfill in 2020/21. This was down 0.2 million tonnes (7.1%) from 2019/20.

Around 48.2% 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 online in recent years and this has provided local authorities with a cheaper alternative to landfill gate fees (Defra 2018).

10.7 million tonnes of local authority waste were sent for recycling in 2020/21. Amongst the 328 local authorities in England, there is considerable variation in 'household waste' recycling rates, ranging from 18% to 64% in 2020/21.

5.5 Manufacturers and the supply chain

Underpinning the above industries are the manufacturers and distributors supplying cleaning and hygiene products. This market includes areas such as:

- Cleaning products - i.e., soaps and detergents
- Cleaning machinery - i.e., pressure washers, scrubber driers, floor cleaning equipment, vacuum cleaners, steam cleaners

Manufacturers have seen an excessive demand for hand cleaning and sanitising products due to Covid-19. This means manufacturers need to speed up their processes in order to cater for the demand, which one would imagine is fairly different to what they are used to, particularly considering that they may have a reduced staff size.

Building service contractors and in-house cleaning and hygiene managers need to procure products, tools and equipment, sometimes from a number of suppliers. There is a growing trend in the cleaning industry among organisations to focus on better management of their supply chains.

It is important for organisations to review supply chain processes such as supplier lists, purchasing, and inventory management to find opportunities to increase operational efficiencies, reduce costs and environmental impact and drive consistency.

The supply chain has further been disrupted in UK - labour shortages, Brexit trade barriers, global supply problems and panic buying have all contributed.

6 Occupations

As indicated in section 4.3 – wider employment, there are a number of occupations that cut across a number of industries but could essentially be considered to be part of the cleaning and hygiene industry.

This section looks at these in some more detail.

6.1 Property, housing and estate managers

159,100 individuals are employed within this highly skilled occupation – this is 11% lower than 2020 data. Key demographics are shown in the table below.

Job holders within this group manage shopping centres, residential areas and private estates, and arrange for the sale, purchase, rental and leasing of property on behalf of clients and employers.

Common tasks in this job:

- determines staffing, financial, material and other short- and long-term requirements.
- manages general upkeep, maintenance and security of the estate's amenities.
- ensures that the amenities meet health and safety standards and legal requirements.
- advises on energy efficiency.

This job role can be found in the following sectors: Real Estate, Services to Buildings, Education and Accommodation. Employment appears to be steady, with 51% reporting to have worked with the same employer for 10 or more years and 34% between 2 and 5 years.

Coronavirus has impacted individuals' roles. 27% of property, housing and estate managers reported that their role had changed substantially within their current job due to coronavirus (LFS 2021).

19% of workers report receiving job-related training or education in the last 3 months, which is slightly less than for all occupations where 24% received training.

Looking forward, the workforce is projected to grow by 4.7% over the period 2017 to 2027, creating 9,100 jobs. In the same period, 70% of the workforce is projected to retire, creating 135,500 job openings (LMI for All 2020).

Table 18 Property, housing and estate managers demographics

	%	Property, housing and estate managers	All sectors
Gender	Male	64%	52%
	Female	36%	48%
Age	Under 25	2%	11%
	25 – 54 yrs.	64%	68%
	55 + yrs.	34%	21%
Status	Employee	65%	86%
	Self-employed	34%	13%
	Full-time	76%	76%
	Part-time	24%	24%
Qualifications	Below L2	11%	19%
	Level 2 & 3	40%	33%
	Level 4+	48%	48%
Migrants	UK Born	88%	82%
	Overseas	12%	18%
Ethnicity	White	90%	87%
	BAME	10%	13%

Source Labour Force Survey Apr-June 2021

6.2 Waste disposal and environmental services managers

Nearly 11,700 individuals are employed within this skilled occupation, a decrease of 7% since 2020. On average a worker receives £21.48 per hour (ONS 2021). Key demographics are shown in the table below.

Waste disposal and environmental services managers plan, organise, direct and co-ordinate the operations and development of waste disposal and related environmental services facilities within private companies or public authorities.

Common tasks in this job:

- determines staffing, financial, material and other short- and long-term requirements.
- manages and delegates tasks to staff and co-ordinates the maintenance and optimum utilisation of waste disposal and related equipment to provide an efficient service.
- monitors levels of waste disposal, recycling and related environmental services, compiles statistics and produces reports.
- liaises with members of the local community to educate and promote the concept of recycling and appropriate waste management.

Employment appears to be steady, with 60% reporting to have worked with the same employer for 10 or more years and 24% between 2 and 10 years.

Coronavirus has impacted individuals' roles. 21% of waste disposal and environmental service managers reported that their role had changed substantially within their current job due to coronavirus (LFS 2021).

Just 13% of workers report receiving job-related training or education in the last 3 months, which is less than all occupations where 24% received training.

Table 19 Waste disposal and environmental service managers demographics

	%	**Waste disposal and environmental service managers**	**All sectors**
Gender	Male	77%	52%
	Female	23%	48%
Age	Under 25	5%	11%
	25 – 54 yrs.	60%	68%
	55 + yrs.	36%	21%
Status	Employee	68%	86%
	Self-employed	32%	13%
	Full-time	82%	76%
	Part-time	18%	24%
Qualifications	Below L2	36%	19%
	Level 2 & 3	17%	33%
	Level 4+	47%	48%
Migrants	UK Born	100%	82%
	Overseas	<1%	18%
Ethnicity	White	100%	87%
	BAME	<1%	13%

Source Labour Force Survey Apr-June 2020

Looking forward, the workforce is projected to grow by 4.7% over the period to 2027, creating 800 jobs. In the same period, 70% of the workforce is projected to retire, creating 11,500 job openings (LMI for All 2020).

6.3 Gardeners and landscape gardeners

Over 154,500 individuals work within this occupation – this is up 11% from 2020 data, where 153,300 were employed.

Considering circumstances 12 months ago (i.e., period between April and June 2020) when the country was in lockdown, 12% of those in these occupations reported they had been on furlough and a further 17% were receiving support through the Self-Employed Income Support Scheme.

Gardeners and landscape gardeners cultivate flowers, trees, shrubs and other plants in public and private gardens, construct features to improve the appearance of existing terrain, and cut and lay turf.

Common tasks in this job:

- levels ground and installs drainage system as required.
- prepares soil and plants and transplants, prunes, weeds and otherwise tends plant life.
- protects plants from pests and diseases.
- cuts and lays turf using hand and machine tools and repairs damaged turf.

Just 6% of workers reported receiving job-related training or education in the last 3 months, which is much less than all occupations where 24% reported that they had received training. This could be a reflection of the fact that two thirds are self-employed and may find it harder to take time off for training.

Table 20 Gardeners and landscape gardeners demographics

	%	Gardeners and landscape gardeners	All sectors
Gender	Male	81%	52%
	Female	19%	48%
Age	Under 25	8%	11%
	25 – 54 yrs.	59%	68%
	55 + yrs.	34%	21%
Status	Employee	36%	86%
	Self-employed	63%	13%
	Full-time	70%	76%
	Part-time	30%	24%
Qualifications	Below L2	36%	19%
	Level 2 & 3	39%	33%
	Level 4+	25%	48%
Migrants	UK Born	93%	82%
	Overseas	7%	18%
Ethnicity	White	99%	87%
	BAME	1%	13%

Source Labour Force Survey Apr-June 2021

The workforce is projected to grow by 3.1% over the period to 2027, creating 4,500 jobs. In the same period, 98% of the workforce is projected to retire, creating 143,000 job openings (LMI for All 2020).

6.4 Pest control officers

The Labour Force Survey reports that there are nearly 11,200 pest control officers in the UK, working in commercial and domestic companies. The number working in pest control is likely to be much greater depending on how individuals report their role. For example, if an individual was the owner of a sole enterprise, they may classify themselves as a manager/director of a pest control company, not an officer, however the LFS does not have a specific occupation code for this level.

Pest control officers investigate the presence of pests that are hazardous to public health or cause nuisance, lay traps to capture pests and treat areas of infestation.

Common tasks in this job:

- receives reports from public, property owners and authorities regarding the presence of pests and infestations.
- visits sites to investigate the presence of rodents, infestations and other pests that may be hazardous to public health.
- lays traps to capture pests and fumigates and disinfects areas to remove infestations.
- advises property owners on courses of action to prevent the return of pests.

The occupation is dominated by male workers (77%). It also employs a greater proportion of under 25's compared to all sectors. Three in ten (30%) do not hold a level 2 qualification (Table 21).

The BCPA, which has 700+ members, reported that they introduced a national standard for mandatory training 10+ years ago and all their members have level 2 or equivalent qualifications, with a commitment to undertake 20 hours of training each year.

Table 21 Pest control officers demographics

	%	Pest Control Officers	All sectors
Gender	Male	77%	52%
	Female	23%	48%
Age	Under 25	24%	11%
	25 – 54 yrs.	40%	68%
	55 + yrs.	35%	21%
Status	Employee	69%	86%
	Self-employed	31%	13%
	Full-time	85%	76%
	Part-time	15%	24%
Qualifications	Below L2	30%	19%
	Level 2 & 3	48%	33%
	Level 4+	22%	48%
Migrants	UK Born	89%	82%
	Overseas	11%	18%
Ethnicity	White	89%	87%
	BAME	11%	13%

Source Labour Force Survey Apr-June 2021

Pest management is said to be the second oldest profession. We have always had pests, which survive by living around humans and can bring a risk to public health that can be huge. However, pest behaviour has changed. With the closure of restaurants, pubs and hospitality during lockdowns, rodents have had to seek new sources of food. This in turn changed work opportunities – the commercial side decreased, while domestic work increased.

The British Pest Control Association (BPCA) reports that recruitment of pest control workers continues to be an issue. It is a problem as the profession is not on most people's radar. People tend to end up working in the sector by chance. They also suffer from churn of people. Individuals may not necessarily be leaving the sector rather moving around within.

With the workforce projected to grow by 11.6% over the period to 2027, creating 1,200 jobs and 57% of the workforce is projected to retire, creating a further 5,800 job openings in the same period, this area of the industry needs to consider future workers. Current employees should be encouraged to progress, while companies should also plan to attract new entrants. The BPCA Training Pathway is designed to suit all learning styles and enables professionals to grow and develop throughout their career. The range of interactive and accessible programmes throughout the pathway provides the knowledge and skills needed to progress your career in the pest management industry.

6.5 Housekeepers, cleaning and housekeeping managers and supervisors and related occupations

There are 42,300 individuals employed as a housekeeper across the UK and a further 64,900 working as a cleaning or housekeeping manager or supervisor role. Numbers in both occupations fell between 2020 and 2021 – 14% for housekeeper and 11% for supervisors and manager positions.

Considering the circumstances 12 months ago (i.e., period between April and June 2020) when the country was in lockdown, 22% of housekeepers reported they had been on furlough, with this increasing to 28% for managers.

Housekeepers and related workers perform domestic cleaning and other housekeeping tasks within private households, hotels, schools, hostels and other non-private households, while cleaning and housekeeping managers or supervisors manage and supervise cleaning and other housekeeping tasks.

These roles can be found across a number of sectors including Food & Beverage services, Health, Social work, Services to Buildings, Accommodation and Education.

Both occupations are dominated by female workers (Table 22). However, the UK Housekeepers Association (UKHA) reports that this is changing, with more men working in these roles.

Migrant workers also account for a greater than average proportion. Two in five (42%%) of managers or supervisors are migrants. This is significantly greater than across all occupations where just 18% are migrant workers.

Part-time working is also common in these roles, but in most instances, this is a 'desired contract'. For example, of the housekeepers who work part-time, 76% cited that they do not want a full-time position. While for managers and supervisors, 70% of those working part-time cited that they do not want a full-time position. However, 13% would have preferred a full-time position if they were able to find one.

Coronavirus has impacted individuals' roles. 31% of housekeepers and 37% of managers and supervisors reported that their role had changed substantially within their current job due to coronavirus (LFS 2021).

Data reveals from the Labour Force Survey indicates more training is occurring. In 2021, 26% of housekeepers reported receiving training in the last 3 months compared to 11% in 2020, while 26% of managers and supervisors had training compared 16% in 2020.

The UKHA supported members with the production of a Covid-19 Toolkit for Housekeeping Teams. It gives both consumers and the industry a recognised set of procedures and assurances, supporting the eventual transition back to normal levels of occupancy.

Table 22 Housekeeper and related occupations demographics

		Housekeepers	Cleaning and housekeeping managers and supervisors	All sectors
Gender	Male	16%	33%	52%
	Female	84%	67%	48%
Age	Under 25	11%	3%	11%
	25 – 54 yrs.	48%	74%	68%
	55 + yrs.	41%	23%	21%
Status	Employee	95%	97%	86%
	Self-employed	5%	3%	13%
	Full-time	44%	74%	76%
	Part-time	56%	26%	24%
Qualifications	Below L2	47%	47%	19%
	Level 2 & 3	31%	39%	33%
	Level 4+	22%	14%	48%
Migrants	UK Born	81%	58%	82%
	Overseas	19%	42%	18%
Ethnicity	White	86%	84%	87%
	BAME	14%	16%	13%

Source Labour Force Survey Apr-June 2021

Both occupations are projected to contract by 1.3% over the period to 2027. In the case of housekeepers, 600 jobs will be lost but in the same period, 68.7% of the workforce is projected to retire, creating 32,000 job openings, highlighting the fact that the workforce has many older workers: 47% are over 55 years of age. Manager and supervisor positions will lose 1,000 jobs, but with 68.7% of the workforce projected to retire, there will be a further 51,400 job openings (LMI for All 2020). Individuals working in this area do have opportunities to progress through the ranks from junior positions up to manager.

However, recruitment and turnover are large challenges in this area of the industry. The UKHA reports that it is hard to get individuals to enter such roles. In addition, the pressure in such roles can be high, particularly in areas of room cleaning where some staff are given just 15 minutes to clean a room.

6.6 Caretakers

Caretakers supervise and undertake the care and maintenance of church, school, office and other buildings, and their facilities, fixtures and contents. Across the UK, there are nearly 60,000 people working as caretakers. The role is predominately undertaken by males and has an ageing workforce with 48% over the age of 55 (Table 23).

Table 23 Caretakers demographics

	%	Caretakers	All sectors
Gender	Male	79%	52%
	Female	21%	48%
Age	Under 25	2%	11%
	25 – 54 yrs.	50%	68%
	55 + yrs.	48%	21%
Status	Employee	96%	86%
	Self-employed	4%	13%
	Full-time	58%	76%
	Part-time	42%	24%
Qualifications	Below L2	55%	19%
	Level 2 & 3	32%	33%
	Level 4+	12%	48%
Migrants	UK Born	76%	82%
	Overseas	24%	18%
Ethnicity	White	81%	87%
	BAME	19%	13%

Source Labour Force Survey Apr-June 2021

Common tasks in this job:

- locks and unlocks doors and entrances at appropriate times.
- supervises and/or undertakes the cleaning and maintenance of premises.
- controls heating, lighting and security systems.
- undertakes minor repairs and notifies owner of need for major repairs.

Caretaker positions can be found in a variety of sectors, including Education, Membership Organisations, Food & Beverage Services, Real Estate and Social Work.

Part-time working is also common in this role – with 42% in a part-time position, but in most instances, this is a 'desired contract'. For example, 60% cited that they do not want a full-time position. However, 30% would have preferred a full-time position if they were able to find one.

Considering the circumstances 12 months ago (i.e., period between April and June 2020) when the country was in lockdown, 28% of caretakers reported they had been on furlough. 26% reported that their role has changed substantially within current job due to coronavirus (LFS 2021).

Just 14% of workers reported receiving job-related training or education in the last 3 months, which is slightly lower than all occupational average where 24% received training.

Looking forward, the workforce is projected to contract by -1.3% over the period to 2027, losing 1,200 jobs. In the same period, 68.7% of the workforce is projected to retire, creating 63,800 job openings (LMI for All 2020).

6.7 Window cleaning and hygiene operatives

According to the Labour Force Survey (LFS) there are 37,500 window cleaning and hygiene operatives across the UK. However, the Federation of Window Cleaners (FWC) estimates that the numbers are much greater. The discrepancy could be due to how people consider their roles - for example if the individual was the owner of a sole enterprise, they may classify themselves as a manager/director, which would not be captured in the LFS as a window cleaning profession.

Depending on the size of the company, positions in this field can include window cleaning operatives and window cleaning supervisors. Then it goes up to window cleaning managers and foreman and Directors and Business owners. Therefore, there is the opportunity to progress in this industry.

Common tasks in this job:

- secures ladders and other equipment to gain safe access to glass.
- selects appropriate cleaning or polishing equipment.
- washes and polishes glass with brushes, cloths, sponges, water and solvents.

Research by Opinium found that one in four households hire window cleaning and hygiene operatives (Crouch 2016). With window cleaning and hygiene operatives having access to people's properties more than any other trade, the Federation of Window Cleaning and hygiene operatives strongly encourages the public to use a bona-fide window cleaner, therefore improving safety, efficiency and status of the cleaner.

The majority (73%) of the workforce are self-employed and over half (64%) do not hold a level 2 qualification (Table 24). The job is not considered to be an easy one and having the right attitude to work is essential. Many new recruits give up quickly as they don’t think it is for them. This therefore impacts on recruitment costs.

Considering the circumstances 12 months ago (i.e., period between April and June 2020) when the country was in lockdown, 7% of window cleaners reported they had been on furlough, with a further 17% receiving support through the Self-Employed Income Support Scheme.

21% reported that their role has changed substantially within current job due to Coronavirus (LFS 2021). For example, work practices became 'paperless' – sign off from jobs included taking pictures and sending to clients rather then previously signed tickets. On the domestic side, businesses have expanded from pure window cleaning to fascia and soffit cleaning – there is greater fabric maintenance.

Table 24 Window cleaning and hygiene operatives demographics

	%	**Window Cleaners**	**All sectors**
Gender	Male	89%	52%
	Female	11%	48%
Age	Under 25	6%	11%
	25 – 54 yrs.	59%	68%
	55 + yrs.	35%	21%
Status	Employee	27%	86%
	Self-employed	73%	13%
	Full-time	58%	76%
	Part-time	42%	24%
Qualifications	Below L2	64%	19%
	Level 2 & 3	32%	33%
	Level 4+	4%	48%
Migrants	UK Born	96%	82%
	Overseas	4%	18%
Ethnicity	White	100%	87%
	BAME	<1%	13%

Source Labour Force Survey Apr-June 2021

The workforce is projected to grow by 0.2% over the period to 2027, creating 100 jobs. In the same period, 63.6% of the workforce is projected to retire, creating 28,100 job openings (LMI for All 2020).

Data from the Labour Force Survey reveals that no worker reported receiving job-related training or education in the last 3 months, compared to the occupational average where 24% received training. This could be linked to the high proportion of self-employment, working long hours (on average 40hrs a week) making it difficult for them to afford the money or time to invest in skill development.

The Federation of Window Cleaners confirmed that training has been a problem for this area. There are limited specific training courses available for window cleaning. Therefore, much training is done 'on-the-job'. Health and safety is a key area; i.e. rope access window cleaning and cradle system cleaning requires specific training to be able to operate. While with water-fed poles, individuals need to consider and plan the safe height clearance of equipment.

Training of new recruits can take 8 to 10 weeks and depending on the environment could be a year before they are left fully unsupervised to work.

6.8 Cleaning Operatives

Cleaning operatives can be classified across three key roles:

- Cleaning and hygiene operatives and domestics
- Industrial cleaning process occupations
- Elementary cleaning occupations

Together there are over 575,700 employed in these occupations – a 5% increase from 2020.

There appears to be a shift in the classification of occupations, with a greater number reportedly working in industrial cleaning process occupations and far fewer in cleaning and hygiene operatives and domestics over the last year. This shift could be a reflection of the increased use of industrial equipment to clean premises, rather than traditional 'hands on' cleaning.

Table 25 Cleaning operatives, 2019 - 2021

	Employment			**Difference 2019-2021**
Industry Occupations	**2019**	**2020**	**2021**	
Industrial cleaning process occupations	27,800	30,800	268,000	240,200
Cleaning and hygiene operatives and domestics	599,800	511,300	291,700	-308,100
Elementary cleaning occupations N.E.C.	4,600	5,700	16,000	11,500
Total	**632,200**	**547,700**	**575,700**	**-56,500**

Source Labour Force Survey Apr – June 2019 & 2020 & 2021

Data rounded to nearest 100, N.E.C. Not elsewhere classified

6.8.1 Cleaning & hygiene operatives and domestics

291,700 individuals (51%) work as cleaning and hygiene operatives and domestics. They clean interiors of private houses, shops, hotels, schools, offices and other buildings. Common tasks in this job:

- scrubs, washes, sweeps and polishes floors, corridors and stairs.
- dusts and polishes furniture and fittings.
- cleans toilets and bathrooms.
- washes down walls and ceilings.

Cleaning and hygiene operatives can be found in a variety of sectors including Services to Buildings, Accommodation, Employment activities, Food & Beverage Services, Health and Education.

The workforce is dominated by women (79%). Three quarters (70%) of the workforce work part-time (Table 26). Of these working part-time 64% report they work part-time due to not wanting a full-time position, 8% report to being ill or disabled and 8% are students. The remaining 19% would like a full-time position but have been unable to find one.

The rates of pay between key occupations vary, as you would expect, according to seniority of position. For example, on average, full-time positions for cleaning and hygiene operatives are paid £9.50 per hour, working on average 37.8hrs. But wages may range between £8.83 and £12.34 (ONS 2021).

Just 10% of workers reported receiving job-related training or education in the last 3 months, which is much lower than the all-occupational average, where 24% received training.

Considering the circumstances 12 months ago (i.e., period between April and June 2020) when the country was in lockdown, 27% of workers in this occupation reported they had been on furlough and 6% were receiving support through the Self-Employed Income Support Scheme.

29% report that their role has changed substantially within their current job due to coronavirus (LFS 2021).

The workforce is projected to grow by 0.2% over the period to 2027, creating 1,400 jobs. In the same period, 63.6% of the workforce is projected to retire, creating 455,200 job openings (LMI for All 2020).

6.8.2 Industrial cleaning process occupations

268,000 individuals (47%) work in industrial cleaning process occupations. Job holders in this group clean manufactured goods, plant and machinery, and industrial, commercial, and other premises. It has previously been considered a low skilled occupation, and this is reflected in the fact that 59% of workers are not qualified to a level 2. However, there are opportunities for young people with 11% of the workforce under 25 (Table 26).

Common tasks in this job:

- uses industrial hoovering, polishing, pressure washing, steam cleaning and sandblasting equipment to clean commercial and industrial premises, public buildings and building exteriors.
- dismantles engines, boilers, furnaces and other industrial plant and machinery, cleans component parts and reassembles equipment.
- washes, rinses, dries and cleans manufactured goods, and stacks cleaned articles ready for removal.

This role can be found across the following sectors: Food products, Services to Buildings, Wholesale Trade, Retail Trade and Land Transport.

Part-time working is also common in this role – with 65% in a part-time position, but in most instances, this is a 'desired contract'. For example, 65% cited that they do not want a full-time position. However, 19% would have preferred a full-time position if they were able to find one.

Considering the circumstances 12 months ago (i.e., period between April and June 2020) when the country was in lockdown, 25% of workers in this occupation reported they had been on furlough and 6% were receiving support through the Self-Employed Income Support Scheme.

25% report that their role has changed substantially within their current job due to coronavirus (LFS 2021).

One in ten (10%) of workers reported receiving job-related training or education in the last 3 months, which is lower than all occupational average where 24% received training.

The workforce is projected to contract by -2.1% over the period to 2027, losing 600 jobs. In the same period, 53.7% of the workforce is projected to retire, creating 16,300 job openings (LMI for All 2020).

Table 26 Cleaning Operatives demographics

	%	Cleaning operatives and domestics	Industrial cleaning process occupations	Elementary Cleaning Occupations NEC	All sectors
Gender	Male	21%	40%	56%	52%
	Female	79%	60%	44%	48%
Age	Under 25	10%	11%	28%	11%
	25 – 54 yrs.	54%	61%	37%	68%
	55 + yrs.	36%	28%	34%	21%
Status	Employee	81%	87%	67%	86%
	Self-employed	18%	13%	33%	13%
	Full-time	30%	35%	58%	76%
	Part-time	70%	65%	42%	24%
Qualifications	Below L2	57%	59%	61%	19%
	Level 2 & 3	32%	30%	4%	33%
	Level 4+	11%	11%	35%	48%
Migrants	UK Born	71%	68%	81%	82%
	Overseas	29%	32%	19%	18%
Ethnicity	White	85%	82%	84%	87%
	BAME	15%	18%	16%	13%

Source Labour Force Survey Apr-June 2021

Domestic cleaning and hygiene operatives

Domestic cleaning and hygiene operatives are a key part of the cleaning industry. One in ten (9%) of households pay cleaning and hygiene operatives to come into their homes (Crouch 2016). In the UK, £26 billion was spent in 2016 on paying people to carry out domestic chores in their homes. However, despite the rising use of domestic cleaning and hygiene operatives very little is known about the true size, and the characteristics, of the people who make up this workforce.

Part of the reason for this is in private households, cleaning and hygiene operatives are generally self-employed and often this activity is “undeclared”, meaning that they are not known to the authorities. Payment can often be cash in hand. We know anecdotally that the workforce is predominantly female, and most of the workers are working part-time. One element of domestic work is that it can switch from being a job to ‘non’-work in a moment, since domestic workers can be hired or fired on a whim (Singha 2019). However, more research is required to have a greater understanding of this rapidly expanding sector.

Non-domestic, commercial cleaning

In addition to domestic cleaning, there is also commercial cleaning. Cleaning companies will formally organise workers on the site of a third party (the client). Companies may coordinate and manage work across numerous sites and across all hours of the day.

Commercial cleaning requires training in safe use of chemicals and handling of heavy equipment, teamwork and efficient use of time. However, due to the previously held assumption that cleaning was unskilled manual work, which has been shown throughout the pandemic to be incorrect, training could be hastily delivered (Singha 2019). However, Smith (2009 in Singha 2019) noted that agency cleaning and hygiene operatives are knowledgeable about a range of cleaning-related information, such as health and safety issues related to cleaning materials and handling industrial vacuum cleaners.

Path Towards Automation

Large-scale, industrial cleaning relies less on manpower and more on technology and machinery.

As autonomous cleaning equipment become more sophisticated and prevalent in the cleaning industry, workers are expected to fill higher-value work from hands-on cleaning activities to equipment fleet management or maintenance, or customer service.

6.9 Refuse and salvage occupations

43,500 individuals work in a refuse and salvage occupation. Nearly all workers are male, working full time (Table 27).

Refuse and salvage collectors supervise and undertake the collection and processing of refuse from household, commercial and industrial premises. The role is considered to be unskilled, with many in the workforce not having a level 2 qualification. Common tasks in this job:

- rides in or on refuse vehicle and alights to pick up domestic refuse.
- carries waste material in dustbins or other containers from premises to refuse vehicle.
- empties refuse into vehicle manually or using an electronic tipping device.
- returns dustbins or other containers to premises.

Refuse and salvage occupations are paid on average £10.34 per hour, with hourly rates ranging from £9.01 to £12.09.

Table 27 Refuse and salvage occupations demographics

	%	Refuse and salvage occupations	All sectors
Gender	Male	95%	52%
	Female	5%	48%
Age	Under 25	16%	11%
	25 – 54 yrs.	65%	68%
	55 + yrs.	18%	21%
Status	Employee	94%	86%
	Self-employed	6%	13%
	Full-time	95%	76%
	Part-time	5%	24%
Qualifications	Below L2	50%	19%
	Level 2 & 3	39%	33%
	Level 4+	11%	48%
Migrants	UK Born	89%	82%
	Overseas	11%	18%
Ethnicity	White	87%	87%
	BAME	13%	13%

Source Labour Force Survey Apr-June 2020

14% of workers reported receiving job-related training or education in the last 3 months, which is lower than the all-occupational average where 24% received training. However, this is greater than previous year where just 7% received training.

The workforce is projected to grow by 0.2% over the period to 2027, creating 100 jobs. In the same period, 63.6% of the workforce is projected to retire, creating 27,500 job openings (LMI for All 2020).

6.10 Vehicle valeters and cleaning & hygiene operatives

There are 26,800 car cleaning and hygiene operatives across the UK. However, the number could be considerably higher due to unregulated hand car washes which have appeared across the UK in recent years. Hand car washers are now regularly seen at supermarkets and road-side petrol stations that have closed down.

Vehicle valeters and cleaning and hygiene operatives clean, wash and polish the interiors and exteriors of ships, aircraft, trains and road vehicles. Common tasks in this job:

- vacuums, brushes and washes vehicle upholstery and interior surfaces.
- empties waste bins and removes rubbish.
- reports any damage or vandalism to the fabric of the vehicle interior.
- washes, cleans and polishes as appropriate the exterior surfaces of vehicles.

Migrant labour is high is this occupation, accounting for 51% of the workforce. Migrant labour is often labelled by employers as 'good workers' who are 'better motivated' and more likely than indigenous labour to accept poor pay and precarious working conditions (Clark and Colling 2019). However, the Car Wash Advisory Service reports that many have significant issues with modern slavery, environmental damage, health and safety and tax evasion (CWAS 2019).

Key skills for working as car washers includes the ability of team members to multi-task and work quickly. The workforce is projected to grow by 0.2% over the period to 2027, creating 100 jobs. In the same period, 63.6% of the workforce is projected to retire, creating 22,300 job openings (LMI for All 2020).

Table 28 Vehicle valeters and cleaning & hygiene operatives' demographics

	%	**Vehicle valeters and cleaning and hygiene operatives**	**All sectors**
Gender	Male	84%	52%
	Female	16%	48%
Age	Under 25	33%	11%
	25 – 54 yrs.	55%	68%
	55 + yrs.	12%	21%
Status	Employee	67%	86%
	Self-employed	33%	13%
	Full-time	75%	76%
	Part-time	25%	24%
Qualifications	Below L2	69%	19%
	Level 2 & 3	21%	33%
	Level 4+	11%	48%
Migrants	UK Born	49%	82%
	Overseas	51%	18%
Ethnicity	White	59%	87%
	BAME	41%	13%

Source Labour Force Survey Apr-June 2021

7 Recruitment and Skills

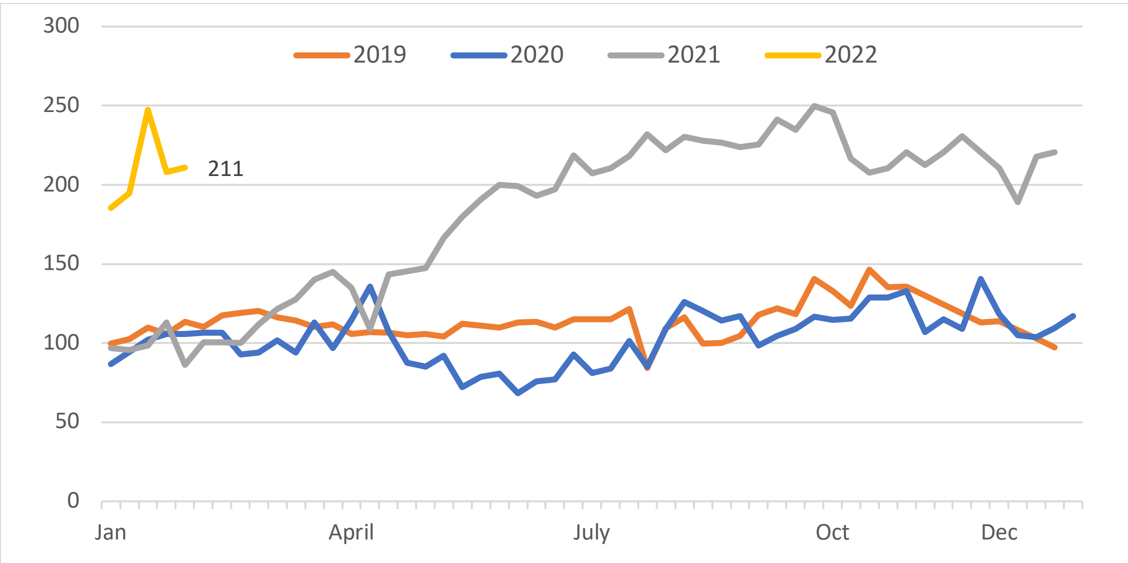
7.1 Vacancies and Recruitment

Across the UK the number of job vacancies in October to December 2021 rose to a new record of 1,247,000, an increase of 462,000 from the pre-coronavirus (COVID-19) pandemic level in January to March 2020 (ONS 2022).

The number of vacancies continues to rise across most industries. Businesses, particularly those with 10 or more employees, are reporting difficulties filling vacancies and a shortage of workers. This was echoed in the interviews with Industry stakeholders.

Looking at online job adverts, Adzuna has produced data which considers Domestic Help[2] (Figure 8). Since April 2021 we can see a continuing increase in the number of online job adverts. The Domestic Cleaning Alliance reports that recruitment is a large challenge. Business is available, but the staff is an issue. Many business owners are currently having to undertake hands on cleaning duties in addition to running the business.

Figure 8 Total job adverts by Adzuna Category 'Domestic Help', UK, Index: 100 = February 2020 average



Experimental job advert indices covering the UK job market for January 2019 – February 2022 produced by Adunza (ONS 2022)

Similar trends are seen across Catering and Hospitality, Wholesale and Retail and Construction. Employers in the cleaning sector need to adapt to a rapidly changing workforce if they are to win the 'frantic' battle for workers.

Companies are having to rethink their own culture, policies and expectations, while workers are reconsidering their workload and are seeking a happy medium that builds a work-life balance they never had before.

[2] The Adzuna categories used do not correspond to Standard Industrial Classification (SIC) categories, so are not comparable with the Office for National Statistics' (ONS) Vacancy Survey.

Recruitment in the industry occurs through a mix of formal and informal methods. Large companies use 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 companies 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.

The immigration system introduced in the wake of Brexit classified cleaning and hygiene operatives as low-skilled, making it much more difficult for overseas staff to find work in the sector. The cleaning and hygiene industry has always depended on employees of all nationalities, but UK nationals have been traditionally hard to attract to the industry.

However, the opportunities for progression for people are huge. Individuals can progress very quickly from the first rung into supervisory/managerial roles. The career pathways in the sector can help to attract individuals and this opportunity needs to be clearly demonstrated to potential entrants. Currently, people tend to see cleaning as a short-term fix not a long-term career, but with the work of the industry in training, the Apprenticeship Levy and The Chartered Practitioners Register, this will undoubtedly change.

7.2 Staff absence

Industry leaders have warned that cleaning staff in healthcare, hospitality and other parts of the sector are facing burnout because of increased workloads due to the COVID-19 pandemic and severe staff shortages.

The extra procedures and protocols put in place during the pandemic to protect people’s health along with the current staff shortages in the sector, compounded by staff absences due to winter illnesses and the disease itself and increasing numbers of personnel leaving the industry, have created a dangerous cocktail which has raised concerns for the health of staff.

In the healthcare sector, workers are struggling to keep up with the pace. The health and wellbeing of the workforce is at stake here.

Staff are taking on extra duties and managers are rolling up their sleeves to help with the practical cleaning aspects yet are still unable to fill the gaps as well as manage and audit the cleaning service effectively. Many long-standing cleaning operatives with years of experience are choosing to leave the profession citing their roles as undervalued and the risk factors as too high.

Longer shifts and overtime have become commonplace in an effort to support colleagues in healthcare, but this is not sustainable and will impact on people’s physical and mental health. Anxiety and depression are a concern.

The healthcare sector is increasingly working with agencies to meet the demands of healthcare cleaning operatives. However, workforce shortages have consequently seen agency fees for workers increase substantially over the last year,but few staff being supplied are not trained.

7.3 Internal skills challenge, training and future skills

The 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.

Training staff in the workplace is widely recognised as a key means to improving skills and productivity, thereby maintaining and improving competition and stimulating economic growth. Staff feel more respected if they are trained and cared for.

Digital transformation has been accelerated across the sector, particularly for training and assessment and working patterns.

The industry made a swift switch to digital content – webinars, meetings, training and assessments and it is not considered likely to change much moving forwards. Working digitally has been successful. People are now comfortable with Zoom/ Teams. The future will see a more hybrid content. With the sector adapting to online training, there are opportunities to expand training delivery. Apps can be developed and made available on phones to give people some basic training. Every morning people in the sector could take part in a little simple training.

The BPCA reported that as an organisation they always ran half day conferences, face to face events that were attended by 50/100 people. However, a recent digital conference saw attendances of 200/300. They had a better penetration of their market, with people also joining from the international market.

From interviews undertaken, there remains a common theme for the need of standardisation and consistency, perhaps even regulation.

Delivering a high-quality healthcare cleaning service is complex, demanding and not to be underestimated. The National Standards of Healthcare Cleanliness 2021 apply to all healthcare environments and replaces the 2007 guidance (NHS 2021). The 2021 standards reflect modern methods of cleaning, infection prevention and control (IPC) and other changes and important considerations for cleaning services during a pandemic; and emphasises transparency to assure patients, the public and staff that safe standards of cleanliness have been met.

However, a repeated request across all areas of the industry was the need for basic, entry level qualification(s). It was highlighted that in other countries like Scandinavian ones, individuals have to have a basic and uniform level of training or to have attended certificated courses before they can work in the industry. The training accreditation is also transferrable if operatives change employers.

Teamworking skills are also key in industry. There is a shift to team cleaning rather than lone cleaning. In some instances, working as a team can be more efficient than lone cleaning but people need the skills to work in a team which also requires good communication skills.

A further consideration for the industry is succession planning. The industry is an ageing workforce and many will be retiring in the coming 10 to 15 years, taking their valuable skills with them. The industry needs to consider a work plan to take the workforce forward. This is an industry where you can develop your own managers, but you need to be able to attract entrants, particularly younger people. However, whilst the industry is not on people's radar there is a great deal of work being undertaken to change the perception or view of the industry as a career choice.

7.4 Apprenticeships in the industry

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

Previous concerns across the industry that there are no apprenticeship standards available for cleaning and hygiene operatives have been alleviated somewhat over the last year with the approval of Healthcare Cleaning Operative Apprenticeship in February 2020. This now provides employers paying into the levy, such as healthcare and local authorities, with the ability to spend their allocation on these operational roles.

However, the concerns that apprenticeships stipulate that 20% of an apprentice's time must be spent in off-the-job training activities such as the teaching of theory, practical training, or time spent writing assessments or assignments, is a barrier. This 20% cannot happen outside paid working hours, which means your apprentice is out of circulation for one day a week – a hefty cost in both business and financial terms, especially if they fulfil a hands-on operational role.

Greater flexibility around the levy would be welcomed in the sector.eg one that incentivises more flexible training thus allowing businesses to buy training modules with their levy funds, that better meets their businesses' needs, not just full qualifications. This would aid the industry in which the current apprenticeship offer is limited.

7.4.1 Healthcare Cleaning Operative Apprenticeship

The approval of the Healthcare Cleaning Operative Apprenticeship in February 2020 is particularly relevant in today's climate of Covid-19. Healthcare and hygiene environments require specific attention to infection control, safety and sanitation for the health and wellbeing of service users and this qualification can help to ensure that cleaning and hygiene operatives meet the standard. This apprenticeship is suitable for those whose role is solely to clean in establishments like:

- Hospitals.
- Care homes where the operative uses a range of cleaning methods.
- Doctors / dentist surgeries where the operative role includes the cleaning of service user equipment.
- Healthcare settings within prisons and schools where a range of cleaning methods are used and equipment used for providing a healthcare service is also cleaned.
- Large childcare settings where cleaning operatives are responsible for deep cleans and cleaning service user equipment such as children's toys.
- Leisure facilities where the operative cleans areas including the poolside and changing rooms.
- Large first aid facilities in establishments such as airports where the cleaning operative has a broad range of duties.

This apprenticeship attracts levy funding of a maximum of £4k per person.

140 individuals started this apprenticeship in 2020 – 21. Considering the pressures the healthcare system was under with Covid-19, it is encouraging to see this investment. But the reality is that the healthcare sector was having to concentrate on doing the job under the pressure of Covid-19, rather than investing in apprentices.

Table 29 Apprenticeship starts (England)

Standard	Level	2019 - 20	2020 -21	2021 – 22*
Healthcare Cleaning Operative	**2**	20	140	40

Source (Gov.UK 2021)

*Figures for 2021/22 are provisional and cover quarter 1 data reported to date (Aug to Oct 2021). All other years are final, full year figures

7.4.2 Cleaning Hygiene Operative

A Trailblazer group of industry employers and sector experts, sponsored by the British Cleaning Council (BCC), has developed the first draft of the much-needed training programme and apprenticeship for the sector.

At the time of writing this report, consultation on the proposal for the apprenticeship was underway. Feedback from the sector is crucial for informing the proposal, which will be considered by the approving body The Institute for Apprenticeships and Technical Education (IfATE) in the next stage of the process. If approved, it is hoped the final Cleaning Hygiene Operative Scheme will be in place in the second half of this year.

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 30 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 Specialities (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
Business Services Association (BSA)	http://www.bsa-org.com/
British Toilet Association	www.britloos.co.uk
British Pest Control Association (BPCA)	www.bpca.org.uk
Chartered Institute of Environmental Health (CIEH)	www.cieh.org
Chartered Institution of Wastes Management (CIWM)	www.ciwm.co.uk
Cleaning & Hygiene Suppliers' Association	www.chsa.co.uk
Cleaning and Support Services Association (CSSA)	http://www.cssa-uk.co.uk
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
Textile Services Association (TSA)	https://tsa-uk.org/
United Kingdom Housekeepers Association	www.ukha.co.uk
Worshipful Company of Environmental Cleaners	www.wc-ec.com

8 Health and safety

The cleaning industry operates in a variety of environments, such as homes, offices, industries, schools, shops, offices, aircrafts and hospitals. The risks that the workforce is exposed to, therefore, depend not only on the tasks they perform, but also on the premises they work in. The main hazards can be chemical, biological and/or physical.

8.1 Cleaning industry liaison forum

HSE in partnership with members of the Cleaning Industry Liaison Forum, continue to promote good practice throughout the industry. The forum comprises representatives from industry trade associations, trade unions and other industry stakeholders.

Its aim is to 'Improve health and safety in the cleaning industry'. A number of BCC members are part of this forum, with campaigns and case studies available on their website (HSE 2019).

One such campaign run by the Equality and Human Rights Commission, is 'Cleaners' Rights'. Launched in 2015 the campaign seeks to improve working conditions in the commercial cleaning sector and to improve understanding of workplace rights by cleaning operatives and their managers. Guidance and Resources are available to download at:

https://www.equalityhumanrights.com/en/cleaners-rights

8.2 Industrial accidents and work-related illness

Data published by the HSE for 2019/2020 (provisional reveals:

- There were 142 fatal injuries in GB (HSE 2021). Of these:
    - 3 fatal injuries were within Waste collection, treatment and disposal activities: materials recovery (SIC 38).
    - 9 were within Services to buildings and landscape activities (SIC 81).
- 51,211 non-fatal injuries to workers were reported via RIDDOR across all industries.
    - 1,476 were reported within Waste collection, treatment and disposal activities, materials recovery.
    - 1,131 non-fatal injuries were reported by employers in Services to buildings and landscape activities (SIC 81).

The consequences of industrial accidents can be significant.

Across the Water Supply and Waste Management industry, there were 8 convictions for offences prosecuted by HSE, with fines totalling £1.5million in 2020/21.

9 Drivers of change in the industry

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

9.1 Political

All-Party Parliamentary Group for the UK Cleaning and Hygiene Industry

In February 2021 an All-Party Parliamentary Group (APPG) for the cleaning and hygiene sector was established. 53 MPs and three members of the House of Lords have joined the group.

The APPG will represent the interests of the cleaning and hygiene sector in parliament and influence MPs, ministers and government.

It is almost a year since the APPG was set up and whilst traction has been seen in the Apprenticeship Levy/Trailblazer group, there has not been the same level of commitment and drive in relation to the main areas of concern and strategy that had been shown at the outset This includes

- Protection and recognition of the role of cleaning and hygiene operatives and personnel as being in an essential and key occupation.
- Recognition that cleaning and hygiene is both critical and essential in restoring the confidence of the nation in returning to work and normality, thus aiding the UK economy to recover.
- Being fully committed to the adoption and recognition of the Apprenticeship Levy as a universal training and accreditation in cleaning and hygiene across the UK.

Unfortunately, the use of the APPG to bring attention to the resourcing issues was not considered a good idea by members during a meeting in December 2021. The BCC were advised the government would not give any leeway in relation to the Immigration Act (Gov.UK 2020) or in temporary visas, despite adaptations being made for HGV Drivers, fruit pickers and poultry workers.

9.2 Economic

Economy

Looking forward, the extraordinary cost of living squeeze, with energy and other prices leading to falls in average living standards, is the significant iceberg for the economy in 2022.

The industry has seen wage cost rises, supply cost rises and subsequently there has been a need to pass these increases on to the customer.

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. Alternatively 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).

9.3 Social

Invisible to visible sector

Covid-19 represents a turning point for the industry where, in the past, it often went unnoticed. It now has national awareness and represents a gateway for the UK to reopen and stay that way.

Once a service that was kept behind the scenes, cleaning in public spaces is now proving to be the key factor in regaining consumer confidence. Independent research commissioned by ABM UK has explored the perception of built environments with regards to the visibility of cleaning and hygiene operatives now, compared to life pre-Covid-19. It shows that the mere sight of disinfection happening in public spaces can go a long way to creating the confidence people need to feel safe and return to the site (C&M 2020).

Wellbeing

Many people are mentally and physically exhausted from the demands of responding to the pandemic – particularly those in the healthcare environment.

Enabling individuals to work and ensuring their safety has been fundamental over the last two years. However, people have also been affected in a number of ways in terms of fear, wellbeing, mental health and health in general.

Lockdown has brought social isolation to many, particularly people living alone or those who have been shielding. More than two-thirds of adults in the UK (69%) report feeling somewhat or very worried about the effect Covid-19 is having on their life. The most common issues affecting wellbeing are worrying about the future (63%) and feeling stressed or anxious (56%) (Marshall, Bibby and Abbs 2020).

Employee welfare has been catapulted to the top of the HR agenda for business leaders, with organisations offering more welfare support. Businesses have become more innovative with different ways to try and support their staff. For example, holding social activities of a virtual nature including daily coffee mornings, wine tasting in the evenings, quizzes, photography contests, and a buddy approach.

Communication is also fundamental, with companies providing regular updates on the approach and changes to staff.

Public Facilities

The British Toilet Association (BTA) reports that public toilets are in "crisis" and rapidly vanishing, with many of those that remain displaying totally unacceptable levels of cleanliness and hygiene. The COVID-19 pandemic has only made the situation worse.

The BTA 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.

However, this is a narrow view as toilets are needed. Tourists needs them as people are now travelling more and need to access toilets. Public toilets are also part of public health and public decency, given that not using the toilet when needed can lead to health problems.

Anyone suffering with an accessibility issue or those caring for someone who has limited mobility or a medical condition are socially excluded and potentially deemed prisoners in their own homes.

With no legal requirement in place to force local authorities to provide or run public toilets, the BTA believes the majority of councils across the UK do not allocate sufficient resources or funds to the provision of public toilets.

It is calling for the government to make sanitation and hygiene a major priority and support local authorities to stop the closures, open new facilities and establish a new set of standards of hygiene and cleanliness.

Government needs to recognise the wider value of public facilities. The Government funds Keep Britain Tidy, which organises talks in schools, litter picks, campaigns etc., but there is no voice for public facilities at government level.

No minister wants to be the minister for public toilets.

There are now opportunities to make profit out of public toilets. Some public toilets are being designed attached to flower shops or coffee shops. This has double benefits for councils as it means they can actually turn a profit from the spaces by renting out shop areas. It also makes antisocial behaviour in and around the toilets less likely.

Wider benefits

Cleaning as an industry has potentially an even greater role to help improve people's health and wellbeing. If we could clean in the right way and promote the importance of cleaning, we can help to reduce pressure on the NHS. It will also increase the confidence within the working population in returning to work post the Covid-19 pandemic and both the government and general public simply have to take it seriously.

Cleaning working patterns

Representatives in the industry do believe that Covid-19 will change the way the industry operates.

Companies are learning a lot more about infection control. Cleaning and hygiene operatives, who used to just clean, are now learning the importance of sanitising every surface. The focus has shifted, and infection control is becoming common knowledge throughout the industry.

Office cleaning is likely to change. There is now an increased appetite for daytime cleaning. People feel safer seeing cleaning being carried out. Consequently, night-time cleaning may decrease, which could be a benefit for workers who find a night shift demoralizing as well as being beneficial from a health and safety perspective.

There will be more of a focus on deep cleans and touch point cleaning, which will require more targeted resourcing.

However, any changes will be led by the customer. There is a big difference between the science and what the customer requires. Science shows the importance of the atmosphere in spreading viruses – coughing/ shouting increases the risk that you will catch it. Touch points are secondary vectors of transmission. People are not informed enough about the consequences of their actions.

9.4 Technological

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

New, sophisticated technology and equipment continues to change the industry. The technology landscape almost seems to change with each passing day, and it is impossible to imagine 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. The industry needs to be ready to embrace these technologies, ensuring staff are fully trained.

Robotics

Robots are now available to perform a number of cleaning functions, presenting a promising alternative to costly human labour for anything from floor cleaning to window cleaning.

Used as a supplement to human employees, cleaning robots eliminate the need for workers to perform many simple and repetitive tasks and allow them to focus more on complex, thought intensive tasks that robots cannot perform (at least, not yet). Robots introduce a new level of efficiency that human cleaners are simply incapable of attaining due to inherent limits of human productivity; a person can only mop so many square feet per hour. Robots may indeed be the future of cleaning, eliminating the need for a window washer to put himself in the precarious position of dangling high above street level, the need for service sheets on the inside of restroom doors, and the need for human cleaning staff to perform time-consuming tasks day after day.

Battery technology

Battery technology is essential to reducing our reliance on fossil fuels. With the increase in robotics, handheld vacuum cleaners etc. they are set to be more important in the sector. However they must be more sustainable vacuum cleaners and easily disposable.

Not managed correctly, the development of batteries could bring a huge amount of waste materials, pollution from toxic waste, and shortage of raw materials. This must be a consideration for the sector.

9.5 Environmental

Sustainable packaging

Businesses or organisations which produce or uses packaging, or sells packaged goods, may be classed as an obligated packaging producer (Gov.UK 2020). Obligated packaging producers must follow rules which help to:

- reduce the amount of packaging produced in the first place.
- reduce how much packaging waste goes to landfill.
- increase the amount of packaging waste that is recycled and recovered.

Many products used across the sector come in plastic and this needs to be recyclable. The recyclable logo is an internationally recognised symbol used to designate recyclable materials, making it easily recognisable to end users/cleaning and hygiene operatives.

The CHSA provides accreditation schemes for distributors, and manufacturers of cleaning chemicals, soft tissue products, plastic refuse sacks and industrial cotton mops guaranteeing that what's on the box is what's in the box' (CHSA 2021).

- Buying from an accredited member of the CHSA's Chemical Manufacturers Accreditation Scheme will be certain that the supplier is ethical and committed to maintaining the highest standards.
- Buying from an accredited member of the Soft Tissue Scheme is the only way to be certain the dimensions and count of every product within the scheme are as indicated on the label.
- The Accreditation Scheme for Plastic Refuse Sacks defined commonly used terms, which means buyers can be certain that plastic sacks stamped with the Accreditation Scheme mark are fit for purpose, and the dimensions and count are as indicated on the label.
- Members of our Accreditation Scheme for Cotton Mops guarantee the weight, absorbency and cotton content of their cotton mops.

Green / Environmental methods

In recent times, more people have grown conscious of the need to conserve the environment by using less harsh cleaning agents and solutions. This has created a new market for industry "green" products which are deemed environmentally friendly. These products are basically non-toxic and use nature-provided ingredients that promote sustainability. The green movement can be used to rebrand and attract new market segments that are clearly drawn towards these environmentally safe products and services. However, if a product is more expensive than a less sustainable one, many clients will not be prepared to pay. In certain areas the industry continues to make great strides – like recycling. In other areas however the costs are more prohibitive.

Electric Vehicles

In June 2019, the UK became the first major economy to pass a net zero law to end its contribution to climate change by 2050. Net zero will require all sectors of the UK economy to deliver substantial further emissions reduction.

There is an increasing range of facilities management and waste management electric vehicles available that help the sector to reduce emissions. This includes electric refuse collection vehicles, electric bin tugs, road legal waste tippers or electric pedestrian trucks with mesh cages for bags of rubbish.

However, moving to electric vehicles by 2050 will be a challenge for the sector.

9.6 Legislation

Plastic Packaging Tax

The Plastic Packaging Tax is a new tax that will be introduced on 1st April 2022. The tax is designed to encourage the use of more recycled plastic and will apply to plastic packaging produced in, or imported into, the UK that does not contain at least 30% recycled plastic.

The rate of the Plastic Packaging Tax will be set at £200 per tonne of plastic packaging placed onto the UK market (GOV.UK 2022)..

The Plastic Packaging Tax will apply to businesses that manufacture or import plastic packaging components or import packaged goods into the UK. The UK government has estimated that it will affect around 20,000 packaging producers and importers.

UK REACH

The Registration, Evaluation, Authorisation and Restriction of Chemicals (UK REACH) requires registrations for substances on the market in Great Britain previously submitted under EU REACH prior to Brexit to be submitted again (HSE 2022).

As of 1st January 2021, the UK REACH and the EU REACH regulations operate independently from each other. Companies that supply and purchase substances, mixtures or articles to and from the EU/EEA/Northern Ireland and Great Britain (England, Scotland and Wales) will need to ensure that the relevant duties are met under both pieces of legislation.

In December 2021, Defra committed to exploring alternative arrangements for UK REACH transitional registrations in order to support chemical businesses whilst upholding the highest standards to safeguard public health and the environment (Defra, HSE 2021).

The government will consult on extending the deadlines for providing the full registration data. Alongside this, the government will engage with industry and other stakeholders to explore whether there are opportunities to reduce the need for industry to replicate existing EU REACH data, by placing a greater emphasis on understanding how chemicals are used in GB. The consultation will take place during 2022.

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11 Annex: Data Tables

11.1 Turnover

Table 31 Turnover (£ million)

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018 (R)	2019	% change 2013 - 19
Cleaning Activities	81.21	General cleaning of buildings	5,000	5,614	5,603	5,526	5,989	5,279	5,552	6,249	6,320	6,471	23%
	81.22	Other building and industrial cleaning activities	766	744	745	745	870	683	796	912	872	1,051	54%
	81.29	Other cleaning activities	1,545	1,502	1,350	1,257	1,437	1,532	1,724	1,888	2,009	2,210	44%
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	10,653	11,679	13,303	13,359	18%
	77.33	Renting and leasing of office machinery and equipment	720	630	732	578	602	564	758	727	597	653	16%
	81.10	Combined facilities support activities	9,853	9,272	10,285	11,034	11,280	12,812	14,572	15,593	15,151	16,056	25%
Landscape Service Activities	81.30	Landscape service activities	3,015	3,403	3,461	3,593	3,538	3,936	4,546	4,449	5,047	4,933	25%
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	5,458	6,173	6,330	6,367	7,870	8,203	7,464	8,391	9,015	9,250	13%
	38.12	Collection of hazardous waste	132	154	154	289	170	149	182	244	300	229	54%
	38.21	Treatment and disposal of non-hazardous waste	2,357	3,167	2,702	3,368	2,736	3,065	3,155	3,657	3,715	3,729	22%
	38.22	Treatment and disposal of hazardous waste	315	431	432	612	597	792	1,132	1,072	991	954	20%
			37,200	**39,191**	**40,958**	**42,584**	**45,405**	**48,370**	**50,534**	**54,861**	**57,320**	**58,895**	**22%**

Source Annual Business Survey (ONS 2021), R- Revised data since 2021 report

11.2 Businesses

Table 32 UK Business Count - enterprises, 2010 - 2021

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
Cleaning Activities	81.21	General cleaning of buildings	9,020	8,305	8,480	8,165	8,780	11,095	11,390	12,055	12,055	12,055	12,295	12,540
	81.22	Other building and industrial cleaning activities	2,175	2,265	2,480	2,625	2,650	3,125	3,170	3,380	3,380	3,380	3,540	3,845
	81.29	Other cleaning activities	2,875	2,835	3,315	3,540	3,810	4,565	4,900	5,595	5,595	5,595	5,790	6,185
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	16,915	16,915	16,915	17,230	17,795
	77.33	Renting and leasing of office machinery and equipment	425	395	370	355	420	445	455	440	440	440	450	455
	81.10	Combined facilities support activities	1,350	1,675	2,050	2,210	2,375	2,630	2,890	3,305	3,305	3,305	3,440	3,660
Landscape Service Activities	81.30	Landscape service activities	16,335	15,815	16,005	15,810	15,820	17,700	18,000	19,075	19,075	19,075	19,560	20,300
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	2,685	2,685	2,685	2,770	2,890
	38.12	Collection of hazardous waste	55	80	100	105	115	120	115	125	125	125	135	130
	38.21	Treatment and disposal of non-hazardous waste	640	700	795	905	925	935	960	1,075	1,075	1,075	1,080	1,080
	38.22	Treatment and disposal of hazardous waste	40	50	65	85	90	105	110	115	115	115	125	120
			45,970	**44,955**	**47,020**	**47,665**	**49,810**	**56,975**	**59,265**	**60,870**	**63,490**	**64,765**	**66,420**	**69,005**

Source NOMIS UK Business Count – enterprises by industry and employment size band (ONS 2021)

Table 33 Businesses in the Industry by nation and region, 2010 - 2021

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
UK	45,970	44,955	47,020	47,665	49,810	56,975	59,265	60,870	63,500	64,765	66,420	69,005
England	38,955	38,085	39,985	40,655	42,785	49,090	51,320	52,945	55,400	56,490	58,030	60,420
Scotland	3,265	3,255	3,385	3,410	3,480	4,020	4,130	4,100	4,175	4,280	4,350	4,460
Wales	2,415	2,355	2,375	2,365	2,365	2,670	2,660	2,625	2,655	2,720	2,760	2,795
Northern Ireland	1,320	1,270	1,275	1,245	1,180	1,180	1,150	1,195	1,270	1,275	1,275	1,330
East of England	5,020	4,910	5,050	5,065	5,185	5,955	6,145	6,400	6,575	6,900	7,055	7,410
East Midlands	3,115	2,965	3,085	3,100	3,220	3,620	3,800	3,845	3,960	4,030	4,140	4,235
London	6,440	6,340	7,100	7,520	8,405	9,560	10,200	10,725	11,135	11,490	11,850	12,430
North East	1,120	1,125	1,170	1,195	1,300	1,510	1,565	1,565	1,615	1,645	1,760	1,790
North West	4,495	4,320	4,490	4,525	4,745	5,520	5,725	5,880	6,060	6,260	6,425	6,740
South East	7,400	7,285	7,710	7,750	8,065	9,305	9,845	10,245	10,580	11,065	11,365	11,790
South West	4,695	4,580	4,590	4,600	4,725	5,520	5,680	5,785	5,925	6,110	6,215	6,395
West Midlands	3,675	3,510	3,655	3,660	3,785	4,270	4,425	4,515	5,495	4,800	4,915	5,140
Yorkshire and Humber	3,040	3,030	3,150	3,235	3,350	3,805	3,945	3,965	4,055	4,190	4310	4,485

Source NOMIS UK Business Count – enterprises by industry and employment size band (ONS 2021)

Table 34 UK Business by size, 2021

			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	7,180	2,355	2,255	315	245	190	**12,540**
	81.22	Other building and industrial cleaning activities	3,030	445	300	35	20	15	**3,845**
	81.29	Other cleaning activities	4,370	1,010	685	65	35	20	**6,185**
Facilities Management	68.32	Management of real estate on a fee or contract basis	14,285	2,145	1,200	80	40	45	**17,795**
	77.33	Renting and leasing of office machinery and equipment	335	60	50	10	0	0	**455**
	81.10	Combined facilities support activities	2,795	375	310	65	50	70	**3,665**
Landscape Service Activities	81.30	Landscape service activities	17,370	1,915	930	55	20	10	**20,300**
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	1,900	400	460	75	30	30	**2,895**
	38.12	Collection of hazardous waste	85	20	20	5	0	0	**130**
	38.21	Treatment and disposal of non-hazardous waste	655	145	200	50	20	10	**1,080**
	38.22	Treatment and disposal of hazardous waste	85	10	20	5	0	5	**125**
		Total	**52,090**	**8,875**	**6,435**	**755**	**460**	**390**	**69,005**
		%	75%	13%	9%	1.1%	0.7%	0.6%	100%

Source NOMIS UK Business Count – enterprises by industry and employment size band (ONS 2021)

Table 35 Business public or private, 2021

			Private				
Sub-Industry	**SIC**	**Definition**	**Company (incl. building society)**	**Sole proprietor**	**Partnership**	**Non-profit body or mutual association**	**Public company**
Cleaning Activities	81.21	General cleaning of buildings	8,625	3,165	705	50	0
	81.22	Other building and industrial cleaning activities	2,765	915	160	5	0
	81.29	Other cleaning activities	4,955	1,005	215	10	0
Facilities Management	68.32	Management of real estate on a fee or contract basis	15,910	835	585	440	25
	77.33	Renting and leasing of office machinery and equipment	415	20	20	5	0
	81.10	Combined facilities support activities	3,330	180	50	100	5
Landscape Service Activities	81.30	Landscape service activities	11,245	7,450	1,535	70	5
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	2,470	320	75	25	0
	38.12	Collection of hazardous waste	115	10	0	0	0
	38.21	Treatment and disposal of non-hazardous waste	940	85	40	15	5
	38.22	Treatment and disposal of hazardous waste	110	5	5	5	5
		Total	**50,870**	**13,995**	**3,385**	**715**	**45**
		%	**74%**	**20%**	**5%**	**1.0%**	**0.1%**

Source NOMIS UK Business Count – enterprises by industry and employment size band (ONS 2021)

Table 36 Count of births of new enterprises for 2010 to 2020

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
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	3,720	3,045	2,560	2,830
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	750	560	545	530
Landscape Service Activities	81.30	Landscape service activities	985	870	980	1,280	1,170	1,435	1,755	1,925	1,775	1,560	1,500
Waste and Resource Management Industry	38.1	Collection of non-hazardous waste Collection of hazardous waste	355	385	425	350	340	350	340	365	385	390	430
	38.2	Treatment and disposal of non-hazardous waste Treatment and disposal of hazardous waste	145	165	225	165	130	140	175	170	175	130	125
Total			**3,490**	**3,865**	**4,080**	**5,005**	**4,850**	**5,400**	**5,745**	**6,930**	**5,940**	**5,185**	**5,415**

Source Business Demography – 2020 Enterprise Births, Deaths and Survivals Table 1.2 (ONS 2021)

Table 37 Count of deaths of new enterprises for 2010 to 2020

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Cleaning Activities	81.2	General cleaning of buildings Other building and industrial cleaning activities Other cleaning activities	2,270	1,965	2,100	2,010	2,025	2,520	2,500	2,425	2,960	2,605	2,150
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	515	540	425	415	380
Landscape Service Activities	81.3	Landscape service activities	1,390	1,250	1,340	1,275	1,265	1,315	1,335	1,365	1,310	1,455	1,135
Waste and Resource Management Industry	38.1	Collection of non-hazardous waste Collection of hazardous waste	195	265	280	325	330	310	275	265	270	310	280
	38.2	Treatment and disposal of non-hazardous waste Treatment and disposal of hazardous waste	85	80	110	130	155	135	140	115	120	130	130
Total			**4,145**	**3,850**	**4,160**	**4,050**	**4,075**	**4,640**	**4,765**	**4,710**	**5,085**	**4,915**	**4,075**

Source Business Demography – 2020 Enterprise Births, Deaths and Survivals Table 1.2 (ONS 2021)

Table 38 Survival of newly born enterprises by births of units in 2015 (%)

Sub-Industry	SIC	Definition	No of Births (2015)	1-year survival (%)	2-year survival (%)	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	2,845	92.4	72.2	59.1	49.9	42.9
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	630	88.9	69.0	54.8	46.8	38.1
Landscape Service Activities	81.30	Landscape service activities	1,435	94.4	80.5	69	61	54.7
Waste and Resource Management Industry	38.1	Collection of non-hazardous waste Collection of hazardous waste	350	90.0	71.4	54.3	45.7	40.0
	38.2	Treatment and disposal of non-hazardous waste Treatment and disposal of hazardous waste	140	85.7	64.3	46.4	42.9	39.3
Cleaning Industry Total			**5,400**	**92.2**	**73.8**	**60.6**	**52.0**	**45.2**
All Businesses			**382,755**	**89.7**	**71.3**	**55.3**	**46.0**	**39.6**

Source Business Demography – 2020 Enterprise Births, Deaths and Survivals Table 5.2a (ONS 2021)

11.3 Employment

Table 39 Employment (GB)

Sub-Industry	SIC	Definition	2015	2016	2017	2018	2019	2020	% Change 2015 - 2020
Cleaning Activities	81.21	General cleaning of buildings	386,000	362,000	361,000	386,000	369,000	370,000	-4%
	81.22	Other building and industrial cleaning activities	25,000	23,000	23,000	28,000	26,000	27,000	8%
	81.29	Other cleaning activities	51,000	49,000	51,000	58,000	52,000	53,000	4%
Facilities Management	68.32	Management of real estate on a fee or contract basis	104,000	97,000	105,000	112,000	113,000	105,000	1%
	77.33	Renting and leasing of office machinery and equipment	3,500	3,000	3,000	3,500	4,000	3,500	0%
	81.10	Combined facilities support activities	183,000	195,000	186,000	199,000	189,000	200,000	9%
Landscape Service Activities	81.30	Landscape service activities	72,000	72,000	81,000	62,000	90,000	81,000	13%
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	59,000	71,000	65,000	77,000	72,000	64,000	8%
	38.12	Collection of hazardous waste	1,000	1,500	4,000	2,250	1,500	1,000	0%
	38.21	Treatment and disposal of non-hazardous waste	28,000	32,000	41,000	37,000	29,000	29,000	4%
	38.22	Treatment and disposal of hazardous waste	7,000	7,000	7,000	8,000	7,000	7,000	0%
		Total	**920,000**	**912,000**	**928,000**	**972,000**	**953,000**	**941,000**	**2%**

Source NOMIS Business Register and Employment Survey (ONS 2021)

Table 40 Employment by nation and region

	2015	2016	2017	2018	2019	2020	Growth 2015-2020
East of England	100,000	106,000	106,000	115,000	109,000	118,000	18%
East Midlands	47,000	40,000	41,000	46,000	48,000	43,000	-9%
London	198,000	187,000	175,000	196,000	187,000	178,000	-10%
North East	31,000	29,000	33,000	35,000	28,000	29,000	-6%
North West	100,000	105,000	110,000	95,000	89,000	82,000	-18%
Scotland	86,000	86,000	85,000	78,000	87,000	91,000	6%
South East	133,000	147,000	131,000	139,000	143,000	125,000	-6%
South West	64,000	64,000	67,000	76,000	68,000	72,000	13%
Wales	30,000	28,000	30,000	33,000	33,000	30,000	0%
West Midlands	65,000	64,000	81,000	91,000	90,000	103,000	58%
Yorkshire and Humber	66,000	56,000	70,000	66,000	70,000	69,000	5%

Source NOMIS Business Register and Employment Survey (ONS 2021)

Table 41 Employment by UK sectors - top 10 indicating where Cleaning Industry fits

Sector	Number employed	% UK employment
Health (Q)	4,047,000	13%
Retail (Part G)	2,832,000	9%
Professional, scientific & technical (M)	2,678,000	9%
Education (P)	2,637,000	9%
Business administration & support services (N)	2,628,000	9%
Manufacturing (C)	2,341,000	8%
Accommodation & food services (I)	2,183,000	7%
Transport & storage (inc postal) (H)	1,540,000	5%
Construction (F)	1,502,000	5%
Cleaning Industry	**1,470,000**	**5%**
Total UK employment	**30,547,000**	

Source NOMIS Business Register and Employment Survey 2020 (ONS 2021) & Labour Force Survey Apr-June 2021 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division. 2021)

11.4 Workforce characteristics

Table 42 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 and hygiene operatives and domestics Window cleaning and hygiene operatives Industrial cleaning process occupations Street cleaning and hygiene operatives Refuse and salvage occupations Vehicle and Valeters

Table 43 Age of workforce (%)

Sub-Industry	Under 25	25 to 34	35 to 44	45 to 54	55 to 64	65+
Cleaning Activities	9%	15%	23%	25%	24%	4%
Facilities Management	8%	23%	19%	25%	20%	4%
Landscape Service Activities	10%	13%	18%	26%	24%	8%
Waste and Resource Management Industry	12%	24%	22%	23%	17%	2%
All Cleaning Industry	**9%**	**17%**	**21%**	**25%**	**23%**	**5%**
All sectors	**11%**	**23%**	**23%**	**22%**	**17%**	**4%**

Source Labour Force Survey Apr-June 2021 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division. 2021)

Table 44 Country of birth (%)

Sub-Industry	UK	Europe	Other
Cleaning Activities	71%	17%	13%
Facilities Management	80%	7%	13%
Landscape Service Activities	92%	5%	3%
Waste and Resource Management Industry	88%	8%	3%
All Cleaning Industry	**79%**	**11%**	**10%**
All sectors	**82%**	**8%**	**10%**

Source Labour Force Survey Apr-June 2021 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division. 2021)

Table 45 Proportion of workforce who are born outside of the UK by region

Nation / Region	Cleaning Industry	All sector
Scotland	23%	12%
Wales	4%	8%
Northern Ireland	16%	9%
East of England	19%	17%
East Midlands	14%	18%
London	60%	40%
North East	4%	8%
North West	13%	14%
South East	23%	19%
South West	12%	11%
West Midlands	10%	17%
Yorkshire and The Humber	10%	12%

Source Labour Force Survey Apr-June 2021 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division. 2021)

Table 46 Ethnicity (%)

Sub-Industry	White	BAME
Cleaning Activities	87%	13%
Facilities Management	85%	15%
Landscape Service Activities	98%	2%
Waste and Resource Management Industry	95%	5%
All Cleaning Industry	**90%**	**10%**
All sectors	**87%**	**13%**

Source Labour Force Survey Apr-June 2021 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division. 2021)

11.5 Pay

Table 47 Hourly paid Gross for all employees by industry, 2021

Sub-Industry	SIC	Definition	Number of jobs	Average Pay (median)	Annual % change	Pay Range
Cleaning Activities	81.21	General cleaning of buildings	156,000	£9.15	1.7%	£8.86 - £12.98
	81.22	Other building and industrial cleaning activities	14,000	£9.50	3.8%	£8.32 - £14.18
	81.29	Other cleaning activities	29,000	£9.93	6.6%	£8.83 - £11.69
Facilities Management	68.32	Management of real estate on a fee or contract basis	80,000	£13.81	0.2%	£9.20 - £21.03
	77.33	Renting and leasing of office machinery and equipment	*	£9.83	*	*
	81.10	Combined facilities support activities	130,000	£11.82	-1.7%	£8.91 - £23.81
Landscape Service Activities	81.30	Landscape service activities	51,000	£11.07	5.7%	£8.95 - £14.30
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	57,000	£12.52	-0.3%	£9.46 - £17.50
	38.12	Collection of hazardous waste	*	*	*	*
	38.21	Treatment and disposal of non-hazardous waste	15,000	£13.02	6.6%	£10.00 - £15.83
	38.22	Treatment and disposal of hazardous waste	*	*	*	*
All industries			27,085,000	£14.10	2.8%	£9.03 – £29.59

Source Annual Survey of Hours and Earnings 2021 Provisional (ONS 2021) Table 16.5a * data unavailable

Table 48 Hourly pay and paid hours worked averages for key occupations, 2021

	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	102,000	£18.70	7.5%	37.4	18,000	£14.83	-4.0%	20.0
1255 Waste disposal and environmental services managers	10,000	£21.48	-0.2%	37.3	*	£11.85	*	*
5113 Gardeners and landscape gardeners	30,000	£10.84	2.9%	39.9	8,000	£10.00	8.9%	18.7
5114 Groundsmen and greenkeepers	36,000	£10.55	4.2%	38.9	*	£10.02	5.6%	*
6132 Pest control officers	*	£11.73	6.6%	37.0	*	£10.48	-2.4%	24.0
6231 Housekeepers and related occupations	15,000	£9.79	0.9%	37.5	21,000	£9.30	1.8%	20.0
6232 Caretakers	42,000	£11.34	3.4%	37.0	25,000	£10.00	3.1%	15.2
6240 Cleaning and housekeeping managers and supervisors	24,000	£10.72	4.7%	38.6	21,000	£10.00	4.6%	20.0
8211 Large goods vehicle drivers	183,000	£12.64	7.0%	45.0	9,000	£11.86	-0.8%	22.2
9132 Industrial cleaning process occupations	12,000	£10.03	3.1%	38.7	8,000	£9.01	3.3%	13.5
9231 Window cleaning and hygiene operatives	*	£10.09	12.9%	37.0	*	£9.10	4.3%	19.9
9232 Street cleaners	6,000	£10.62	1.3%	37.0	*	£9.23	5.1%	*
9233 Cleaning and hygiene operatives and domestics	110,000	£9.50	1.8%	37.5	421,000	£9.24	2.7%	14.8
9235 Refuse and salvage occupations	23,000	£10.35	1.1%	37.0	*	£9.36	1.4%	23.6
9236 Vehicle valeters and cleaners	10,000	£9.24	6.0%	40.0	*	£8.91	8.8%	16.1
9239 Elementary cleaning occupations n.e.c.	*	£9.45	-2.4%	37.0	*	£9.20		19.0
All occupations	19,541,000	£15.65	3.3%	37.5	7,544,000	£10.64	2.5%	18.7

Source Annual Survey of Hours and Earnings 2021 Provisional (ONS 2021) Table 14.5a and Table 14.10a * data unavailable

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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