BRITISH CLEANING COUNCIL

THE CLEANING, HYGIENE AND WASTE INDUSTRY

RESEARCH REPORT

2021

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BRITISH CLEANING COUNCIL
bcc
YOUR INDUSTRY • YOUR VOICE

Established 1989
abcd
Association of Building Cleaning Direct Service Providers

ahcp
committed to excellence

bache
british association of cleaning in higher education

BACS
British Association for Chemical Specialities

BICSc
THE BRITISH INSTITUTE OF CLEANING SCIENCE

BPCA
British Pest Control Association

The Business Services Association

BTA
British Toilet Association
For your convenience

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

BRITISH CLEANING COUNCIL
bcc
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Chartered Institute of Environmental Health

CIWM

CSSA
CLEANING & SUPPORT SERVICES ASSOCIATION

DCA
Domestic Cleaning Alliance

FWC
FEDERATION OF WINDOW CLEANERS

ICMMA
Industrial Cleaning Machine Manufacturers' Association

KEEP BRITAIN TIDY.

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

tsa

UKHA
UK HOUSEKEEPERS ASSOCIATION

wamitab

The National Association of Wheeled Bin Washers

Worshipful Company of Environmental Cleaners

British Cleaning Council

The Cleaning, Hygiene and Waste Industry

Research Report 2021

By

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Executive Summary

The cleaning and hygiene industry provides a vital service to the economy, ensuring that our workplaces, hospitals, schools, transport, and public spaces are clean and pleasant to use.

The industry directly employs over 957,000 people. If occupations that involve cleaning and hygiene 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, which is similar to the Transport and Storage Sector. The cleaning industry can therefore be considered a top ten employment industry in the UK.

The industry continues to grow, with a reported 66,420 businesses operating in 2020, up from nearly 60,000 in 2016. Nearly nine in ten (88%) are micro businesses, employing less than ten individuals and 99% of businesses are private firms.

The revised data for 2018, shows that the industry contributed over £55.5 billion to the economy. Turnover increased 30% since 2013, a rate much greater than all economy growth of 13%. All subsectors reported growth above national average in 2018. However, Covid-19 meant there are mixed fortunes across the sub-industries:

- Services to Buildings and Landscape Activities (SIC 81) monthly gross domestic product (GDP), in February 2021, was 13% below their February 2020 level, the last full month of "normal" operating conditions.
- Waste Collection treatment and disposal activities has seen a slight growth at 3.4% over same time period.
- Manufacture of soap and detergent cleaning and polishing perfumes and toilet preparations had a growth of 1.2% above the February 2020 level.

Demand has not been static across business areas during 2020. Cleaning in healthcare and educational settings increased to combat the spread of Covid-19, but with much of the accommodation and leisure sector closed, demand for services here decreased with staff being furloughed. The supply chain – manufacturers and distributors – also needed to adapt. Demand for some products soared while supply simultaneously shrunk, forcing many companies to take new measures to carefully manage the exceptional situation.

The dedication of the cleaning and hygiene operatives who have been doing vital work protecting the health and wellbeing of others and keeping key industries going since the pandemic began, has helped to highlight the importance of the industry. 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. For example, research commissioned by AMB UK found that:

- 61% of participants said that seeing cleaning and hygiene operatives in public spaces makes them feel that safety measures are being taken seriously.
- 45% of survey respondents agreed that the visibility of cleaning in progress would encourage them to return to a built environment, whether that is an office space, shopping centre or airport.

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.

The newly established All-Party Parliamentary Group (APPG) driven by the British Cleaning Council for the cleaning and hygiene industry is a key opportunity for the industry to keep the industry in the spotlight and look to overcome the challenges it faces. Challenges include:

- Raising the profile from a career perspective. Many key occupations are expected to see growth, and with significant numbers retiring there will be opportunities in the period up to 2027, yet recruitment and turnover is an issue. The variety of roles in the industry is endless and the ability to progress once in the industry is immense.
- Training. Headway has been made with the approval of the Healthcare Cleaning Operative apprenticeship in February 2020 but there remains no general cleaning apprenticeship route and other areas also lack recognised and universal training accreditation. The Trailblazer Group is now in situ to seek resolution in this matter sponsored by the British Cleaning Council.
- Immigration Act and Brexit. The end of free movement is a concern for an industry which employs an above average number of migrants, particularly in cleaning. Cleaning has not been identified as a skilled role and there are concerns about future availability of labour, which again reflects the absolute need for a Government recognised training accreditation. This is more prevalent than ever before given the outstanding work of cleaning and hygiene operatives in helping to keep people safe throughout Covid-19.
- Future: Covid-19 has and will continue to impact the sector. Enabling individuals to work and ensuring their safety has been fundamental during this period. Working practices have changed, be that working from home or changing cleaning practices to provide a greater focus on deep cleans and touch point cleaning. In addition, employee welfare has been catapulted to the top of the HR agenda for business leaders.

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 over £55 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 2020 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 Covid-19

The coronavirus pandemic has been unprecedented, and the impact has been far and wide.

The UK entered its first lockdown in March 2020, with individuals told to work from home wherever possible, and only leave their homes for essential purposes. In May 2020 the Government decided to switch the public message from “stay at home” to “stay alert” and over the coming months non-essential shops restaurants, pubs and hairdressers were given the green light to reopen.

Government and Devolved Nations managed their own countries response to pandemic but the Autumn of 2020 and start of 2021 saw further lockdowns imposed. As of March 2021, Government have laid out a roadmap to move out of lockdown, with all being well restrictions easing by late June 2021.

2.1 Economic impact

The spread of Covid-19 and the actions to contain it have had a dramatic impact on the UK economy and on many other countries around the world.

Businesses within industries hardest hit by coronavirus restrictions – such as arts, hospitality, construction, retail and manufacturing (which together account for 22.7% of GDP) – have shown signs of adapting to public health restrictions. For example, more than 80% of arts, entertainment and recreation and accommodation and food businesses were temporarily closed during Spring 2020, lockdown but this had dropped to around 55% during January 2021. I In construction, around 30% of companies paused trading in Spring 2020, but this was down to less than 4% in early 2021.

These changes are likely to be a result of businesses adapting, such as hospitality companies offering takeaway only, arts organisations streaming performances online and construction companies introducing measures to make their workplaces Covid-19-secure.

However, 31% of all businesses reported that their sites were temporarily or permanently closed in March 2021 (ONS 2021), with the South East and London having the highest percentages of sites temporarily or permanently closed, both at 6%, equating to around 34,000 and 24,000 businesses, respectively.

As a service industry the cleaning and hygiene industry is directly impacted by the operating of other sectors. Latest data shows that the service sector has not recovered to pre-pandemic levels (ONS 2021). Services to Buildings and Landscape Activities (SIC 81) monthly gross domestic product (GDP) in February 2021 is 13% below its February 2020 level, the last full month of “normal” operating conditions.

Production industries as a whole have also not recovered to pre-pandemic levels, with some of its industries more severely affected than others (ONS 2021).

- Waste Collection treatment and disposal activities, in February 2021 had seen a slight growth at 3.4% above its February 2020 level.
- Manufacture of soap and detergent cleaning and polishing perfumes and toilet preparations grew by 1.2% above the February 2020 level.

2.2 High and Low Demand

The impact of coronavirus has varied from business to business within the cleaning and hygiene industry and its supply chain.

When the country entered locked down in March 2020 the need for cleaning supplies (and paper products) shifted from the institution to the home. Consumers snapped up cleaning products seconds after they arrived on store shelves. Cleaning and disinfectant product manufacturers, and their retail customers, subsequently struggled to keep up with the demand. However, demand for cleaning products for the catering, leisure and hospitality industries reduced significantly and continues to remain low with these sectors predominately closed. This has meant that demand for some products has soared while supply has simultaneously shrunk, forcing many companies to take new measures to carefully manage the exceptional situation.

With much of the accommodation sector closed (hotels, holiday parks) a great many cleaning and hygiene operatives have been furloughed. With Step 3 of the roadmap out of lockdown, it is anticipated that all accommodation will be opened potentially from mid-May 2021, meaning that cleaning and hygiene operatives and housekeeping roles will be in demand, ending furlough for such roles.

Domestic and commercial window cleaning stopped overnight with the first lockdown. The Federation of Window Cleaners (FWC) said that 80% of members were furloughed, with just 20% working (ThisWeekinFM.com 2020). However, as window cleaning is not a job that can be undertaken from home and is a hygiene support activity – i.e., cleaning touch points such as doors/ windows etc. it has continued. Some companies have diversified into sanitising and fighting the coronavirus on client premises, public transport, buildings and offices.

The Domestic Cleaning Alliance (DCA) surveyed its membership in August 2020. They found almost all respondents had stopped providing all services on the day of the lockdown announcement or had stopped earlier– however prospects have improved recently (ThisWeekinFM.com 2020).

However, cleaning in healthcare and educational settings increased to combat the spread of Covid-19. Cleaning and hygiene operatives in the healthcare sector played a key role during the pandemic and have done an incredible job, with many going above and beyond, working longer hours, taking on extra responsibilities and adopting new standards and practices to prevent Covid-19 contamination. AHCP members played a vital role getting the Nightingale Hospitals set up and staffing them.

2.3 Labour market and working patterns

Government advice during national lockdown is to Stay at Home. Individuals can only leave home for work purposes where it is unreasonable for individuals to do their job from home.

Where is not possible to work from home, people should go into work where it is safe and they are not symptomatic, following relevant Public Health England (PHE) guidance.

Consequently, there have been changes in working patterns with office-based staff working from home. But for many roles this has not been possible, and these have had to consider how they could operate in safe manner. This includes companies ensuring that they had Covid-19 Risk Assessments in place, sufficient PPE, the creation and provision of new Covid-19 training process on disinfection and sanitisation.

Trade associations, along with Government, have been providing advice, guidance and resources on how to work safely (Gov.UK 2021). However, the divergence in advice between the four UK nations has also caused confusion for the sector. Especially for those who operate across the four countries.

2.3.1 Wellbeing

Enabling individuals to work and ensuring their safety has been fundamental during this period. 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.

2.4 Key worker status

Key workers – employees who provide an essential service – are allowed to continue their work unimpeded during Covid-19 restrictions, with schools open to help facilitate this. Across the country, 10.6 million of those employed (33% of the total workforce) were in key worker occupations and industries (ONS 2020).

As a service industry, some areas were clearly identified as an essential service, for example the waste industry, and food industries received keyworker status, but for others there was uncertainty.

The British Pest Control Association (BPCA) lobbied Government ministers (BCPA 2020) for pest management professionals to be designated keyworker status. George Eustice, Secretary of State for Environment, Food and Rural Affairs (Defra) confirmed that pest management was an essential sector, with pest management covered in the key worker list under the "food and necessary goods" section, specifically concerning hygiene in April 2020 (BPCA 2020).

The Cleaning and Hygiene Suppliers Association (CHSA), which represents manufacturing and cleaning and hygiene companies, also lobbied hard to ensure that delivery and manufacturing of cleaning and hygiene supplies were also considered a key worker occupation.

However, cleaning and hygiene operatives only have key worker status if they work within the following industries (ONS 2020):

- Hospital activities.
- General medical practice activities.
- Dental practice activities.
- Other human health activities.
- Residential nursing care activities.
- Residential care activities for learning disabilities, mental health and substance abuse.
- Residential care activities for the elderly and disabled.
- Other residential care activities.

The British Cleaning Council will continue to lobby for all cleaning and hygiene operatives to be given keyworker status through the APPG process.

2.5 Invisible to visible 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. 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).

Of the 1,000 research participants:

- 61% said that seeing cleaning operatives in public spaces makes them feel that safety measures are being taken seriously.
- Nearly half (48%) agreed it reminds them to stay alert.

- A quarter of people said that visible cleaning instilled a sense of trust in the environment and 27% agreed it made them feel safe.
- 45% of survey respondents agreed that the visibility of cleaning in progress would encourage them to return to a built environment, whether that is an office space, shopping centre or airport.

Covid-19 represents a turning point for the facilities services industry where, in the past, facilities services often went unnoticed. It now has national awareness given the primary requirement for hygiene to be first and foremost and therefore represents a gateway for the UK to reopen and stay that way.

2.6 Future of the cleaning industry

2.6.1 Cleaning

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.

The UKHA expects there to be much more cleaning and sanitising in future, to a higher level, in hotels.

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 you will catch it. Touch points are secondary vectors of transmission. People are not informed enough about the consequences of action.

2.6.2 Office requirements

The vast remote working programme over the course of the Covid-19 pandemic has forced many companies to reconsider how they do business and office space needed. Many companies are looking to cut their office space as companies move to greater flexible working. For example, Deloitte anticipates that up to a third of workers will work remotely post-pandemic and Deutsche Bank says 80% of UK staff could work from home for up to two days a week (Financial News 2021).

How this will impact the commercial cleaning and hygiene industry remains to be seen.

2.6.3 Digital

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.

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

Home working was initially seen as a temporary solution. Consequently, not everyone will have the correct set up - working at a coffee table with a laptop is not acceptable long term. However, there are also benefits to working from home and it is likely there will be more flexible working patterns. Moving forward, there appears to be a need for organisations to accelerate the formalisation of plans for both their staff welfare and flexible-working policies. This will give their employees the much-needed clarity and, equally importantly, assist the business's own talent attraction and management.

To note, the statistics available in the following chapters do not account for the effect of the coronavirus pandemic – the data is pre-pandemic.

3 Economic landscape

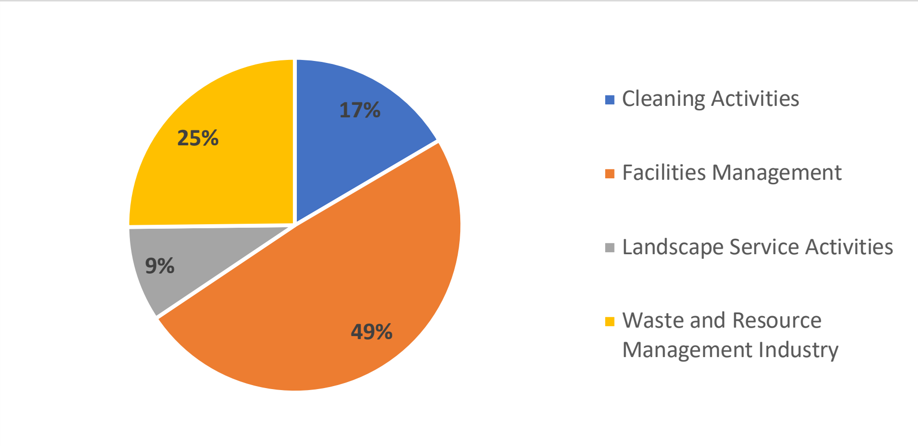
3.1 Sector turnover

The revised data for 2018 shows that the industry contributed over £55.5bn to the economy in 2018. It provides a vital service to us all ensuring our workplaces, hospitals, schools, transport and public spaces are clean, safe and pleasant to use.

Turnover has increased by 30% since 2013, greater than all economy growth in which turnover increased by 13% (ONS 2020).

49% of the industry turnover was from facilities management, while waste and resource management contributed 25%, cleaning activities 17% and landscape services 9% (Figure 1).

Figure 1 Turnover by subindustry



Source Annual Business Survey - 2018 Revised Results (ONS 2020)

3.2 Businesses

3.2.1 Number and size

The cleaning and hygiene industry is quite competitive with both small and medium companies competing for the same pie size 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 and 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 66,420 businesses operate (ONS 2020).

In terms of growth there have been some significant differences across the nations and regions over the last year. In England business numbers increased by 3% between 2019 and 2020, 2% in Scotland, 1% in Wales, while in Northern Ireland the number remained stable. The North East saw an increase of 7%, while all other regions increased by 2-3% (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).

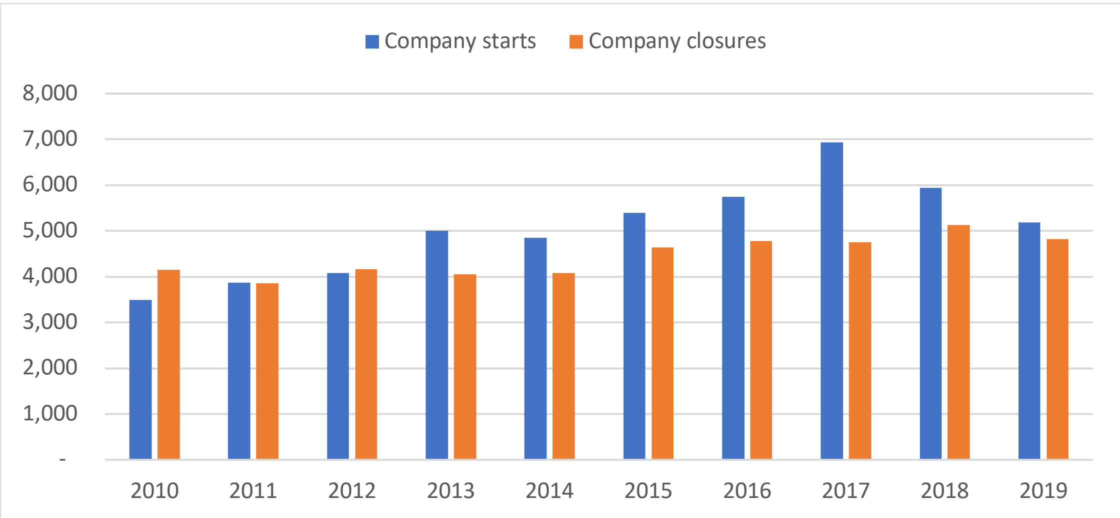
3.2.2 Start-ups, closures and survival rates

The number of new businesses in the cleaning and hygiene industry decreased by 13% from 5,940 to 5,190 between 2018 and 2019. This was in contrast to the all-sector data in which the number of new businesses increased by 14% from 370,160 to 390,230 (ONS 2020).

During the same period the number of businesses that ceased trading decreased from 5,065 to 4,820 between 2018 and 2019, a decrease of 5%. This goes against the UK trend where the proportion of closures increased by 8% (ONS 2020).

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 2020).

Figure 2 Company start-ups and closures in the industry, 2010 - 2018



Source Business Demography - 2019 Enterprise Births, Deaths and Survivals (ONS 2020)

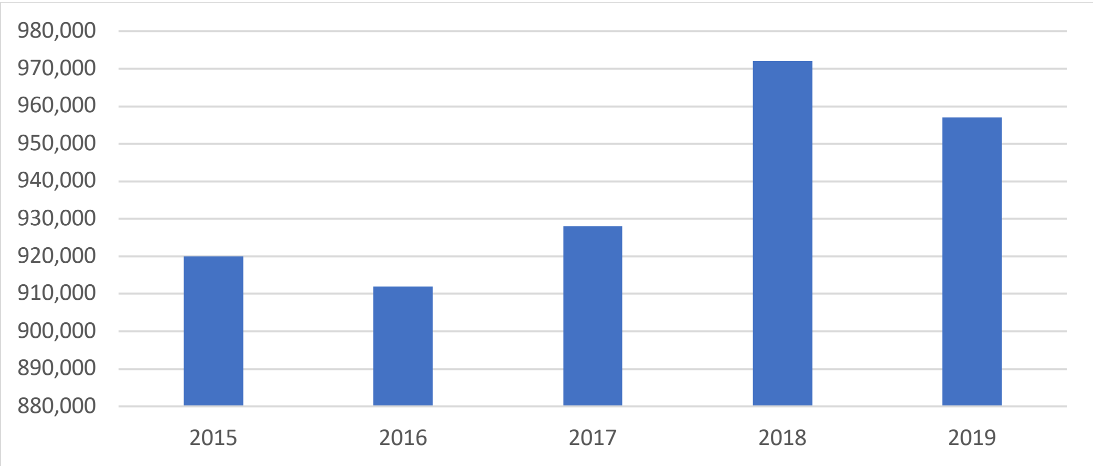
4 Workforce size and characteristics

4.1 Number employed

The industry directly employs over 957,000 individuals across Great Britain.

Overall employment has increased 4% between 2015 and 2019. This employment growth is in line with the whole economy which recorded a 4% growth in the same period. However, employment in the industry did fall between 2018 and 2019 by 2%.

Figure 3 Change in employment numbers, 2015-2019



Source Business Register and Employment Survey (ONS 2020)

Industry employment growth rate has varied across the regions between 2018 and 2019 (see annex Table 40). Scotland experienced greatest growth at 12% but the North East, South West, North West, London and East of England all saw numbers employed in the industry decrease.

4.2 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, which is on a par with the Transport and Storage Sector (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	43,800	150,000	193,800	13%
Waste disposal and environmental services managers	1,700	13,600	15,300	1%
Gardeners and landscape gardeners	111,800	41,600	153,300	10%
Pest control officers	5,700	-	5,700	0%
Housekeepers and related occupations	9,300	42,000	51,300	3%
Caretakers	4,200	51,800	56,000	4%
Cleaning and housekeeping managers and supervisors	21,800	51,900	73,700	5%
Industrial cleaning process occupations	11,000	19,700	30,800	2%
Window cleaning and hygiene operatives	27,100	-	27,100	2%
Street cleaners and hygiene operatives	3,600	1,200	4,800	0%
Cleaning and hygiene operatives and domestics	238,700	272,600	511,300	35%
Refuse and salvage occupations	21,300	5,300	26,600	2%
Vehicle valeters and cleaning and hygiene operatives	-	28,000	28,000	2%
Elementary cleaning occupations N.E.C.	3,600	2,100	5,700	*
Other Occupations	288,400		288,400	20%
Total	**791,800**	**679,900**	**1,471,600**	

Source Labour Force Survey Apr – June 2020 (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 2020.

It indicates a 10% decline in employment numbers. The period of employment was for April to June for each year. Therefore, the 2020 data could be seeing the initial impacts of Covid-19. However, Government statisticians are advising caution with the datasets. There is a suggestion that decreases are consequence people not starting new jobs (i.e., there were no new jobs, but you still have 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 2019-2020

	Employment		**Difference 2019-2020**
Industry Occupations	**2019**	**2020**	
Property, housing and estate managers	198,900	193,800	-5,100
Waste disposal and environmental services managers	19,300	15,300	-4,000
Gardeners and landscape gardeners	183,500	153,300	-30,200
Pest control officers	13,700	5,700	-8,000
Housekeepers and related occupations	54,600	51,300	-3,300
Caretakers	85,200	56,000	-29,200
Cleaning and housekeeping managers and supervisors	83,500	73,700	-9,800
Industrial cleaning process occupations	27,800	30,800	3,000
Window cleaning and hygiene operatives	31,900	27,100	-4,800
Street cleaners and hygiene operatives	9,000	4,800	-4,200
Cleaning and hygiene operatives and domestics	599,800	511,300	-88,500
Refuse and salvage occupations	37,100	26,600	-10,500
Vehicle valeters and cleaning and hygiene operatives	32,800	28,000	-4,800
Elementary cleaning occupations N.E.C.	4,600	5,700	1,100
Other Occupations	253,300	288,400	35,100
Total	**1,635,000**	**1,471,600**	**-163,400**

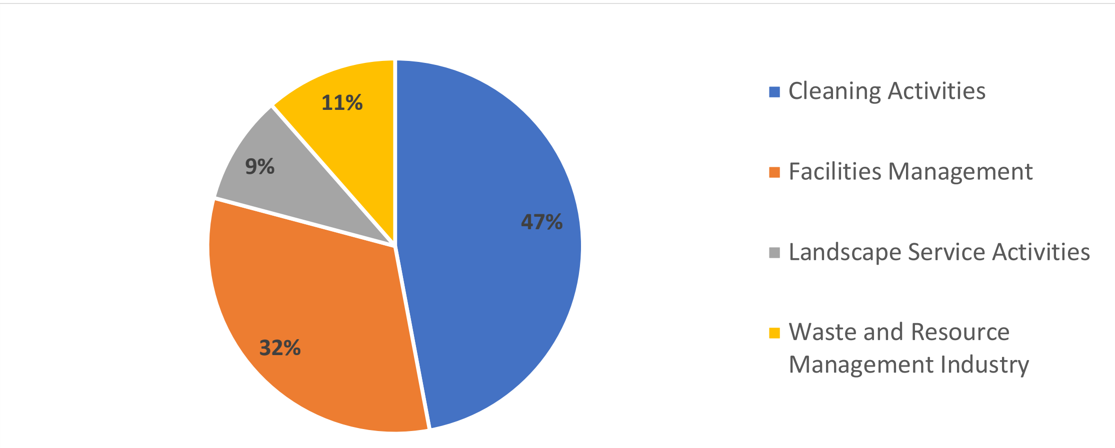
Source Labour Force Survey Apr – June 2019 and 2020

4.3 Employment by sub-industry

While facilities management accounts for 49% of the industry turnover, only 32% of the employment is within this sub-industry.

Cleaning and hygiene activities accounts for nearly half (47%) of all employment, with waste and resource management accounting for a further 11%.

Figure 4 Employment by subindustry, 2019



Source Business Register and Employment Survey (ONS 2020)

4.4 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.

4.4.1 Occupational breakdown

The majority (41%) of workers are employed in elementary roles. This is significantly higher than the proportion seen across all UK sectors (Table 4). A further fifth (19%) 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	12%	11%
Professional Occupations	4%	22%
Associate Professional and Technical Occupations	4%	15%
Administrative and Secretarial Occupations	7%	10%
Skilled Trades Occupations	19%	10%
Caring, Leisure and Other Service Occupations	5%	9%
Sales and Customer Service Occupations	1%	7%
Process, Plant and Machine Operatives	6%	6%
Elementary Occupations	41%	10%

Source Labour Force Survey Apr – June 2020

4.4.2 Key occupations

Given that 41% of the workforce falls within elementary occupations, it is of little surprise that cleaning and hygiene operatives and domestics, window cleaning and hygiene operatives and refuse and salvage roles (all of which fall into the elementary occupations category) are all in the top eight occupations. Gardeners and landscape gardeners (a skilled trade) account for a further 16% of the workforce.

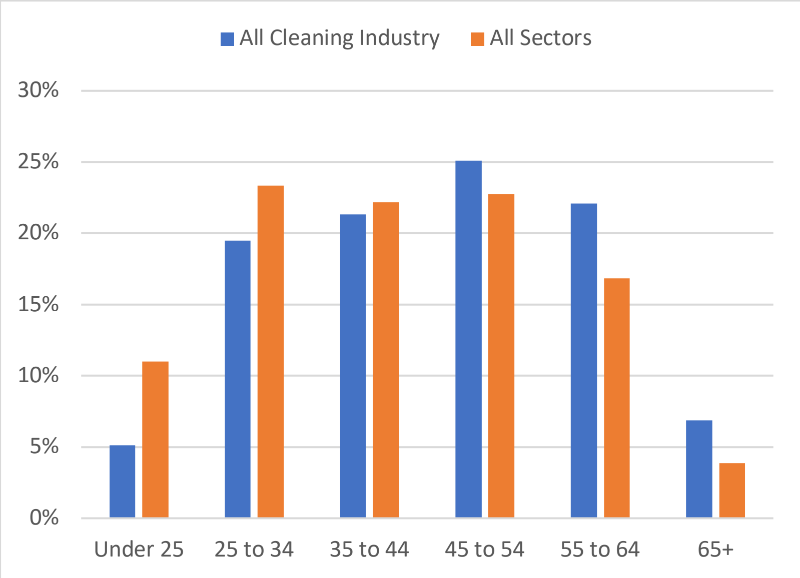
Table 5 Top ten occupational roles in the cleaning industry

Rank	Occupation (SOC)	Number	% workforce
1	9233 Cleaners and hygiene operatives and domestics	238,700	30%
2	5113 Gardeners and landscape gardeners	111,800	14%
3	1251 Property, housing and estate managers	43,800	6%
4	9231 Window cleaning and hygiene operatives	27,100	3%
5	4159 Other administrative occupations n.e.c.*	23,700	3%
6	8211 Large goods vehicle drivers	22,100	3%
7	6240 Cleaning and housekeeping managers and supervisors	21,800	3%
8	9235 Refuse and salvage occupations	21,300	3%
9	1259 Managers and Proprietors in other services N.E.C.	15,200	2%
10	9132 Industrial cleaning process occupations	11,000	1%
	Other occupations	255,300	32%
	Total Workforce	791,754	

Source Labour Force Survey Apr – June 2020 (*N.E.C. = Not elsewhere classified)

4.4.3 Age

Figure 5 Age profile of the industry



Source Labour Force Survey Apr – June 2020

The vast majority of the workforce are aged between 25 and 54 (66%).

The proportion of staff under 25 in the industry is much lower than seen across all economy (5% v 11%). In contrast the proportion of staff aged over 55 (29%) is higher (21%) suggesting that that the sector may face issues around an ageing workforce.

4.4.4 Gender

Across the industry the gender of workers is fairly evenly split – 53% are male and 47% female. 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.

Table 6 Gender within the cleaning industry

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

Source Labour Force Survey Apr – June 2020

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

The proportion of women working in elementary occupations is considerably higher in the cleaning industry compared to the whole economy (63% compared to 47%).

Women appear to be significantly under-represented in skilled trade occupations and professional occupations within the industry.

Table 7 Occupational profile by gender

	Cleaning Industry		All sectors	
	% Male	% Female	% Male	% Female
Managers and Senior Officials	56%	44%	63%	37%
Professional Occupations	83%	17%	49%	51%
Associate Professional and Technical Occupations	47%	53%	55%	45%
Administrative, Clerical and Secretarial Occupations	20%	80%	27%	73%
Skilled Trades Occupations	81%	19%	89%	11%
Personal Service Occupations	43%	57%	19%	81%
Sales and Customer Service Occupations	61%	39%	38%	62%
Transport and Machine Operatives	91%	9%	88%	12%
Elementary Occupations	37%	63%	53%	47%

Source Labour Force Survey Apr – June 2020

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 84% of gardeners or landscape gardeners are also male (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division 2020).

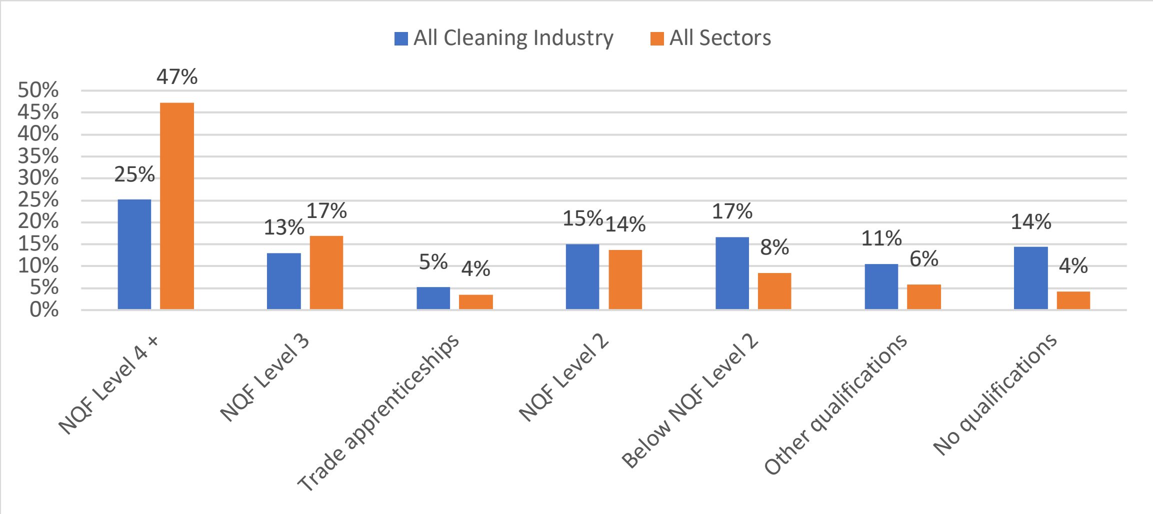
4.4.5 Qualification levels

Workers in the industry hold significantly lower levels of qualifications.

47% of the workforce do not hold a level 2 compared to just 21% across the economy. The industry also has significantly lower proportion holding level 4 qualifications (22% v 45%).

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 2020

4.4.6 Migrants

The number of foreign-born people working in the industry accounts for 20% of the workforce. This is greater than all sector figure where 17% of the workforce are foreign born.

There is variation across the nations/regions. For example, in London 55% of the industry workforce were born overseas while in the North East 9% of the workforce were (see Annex Source Labour Force Survey Apr-June 2020

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.

5 Working hours and pay in the industry

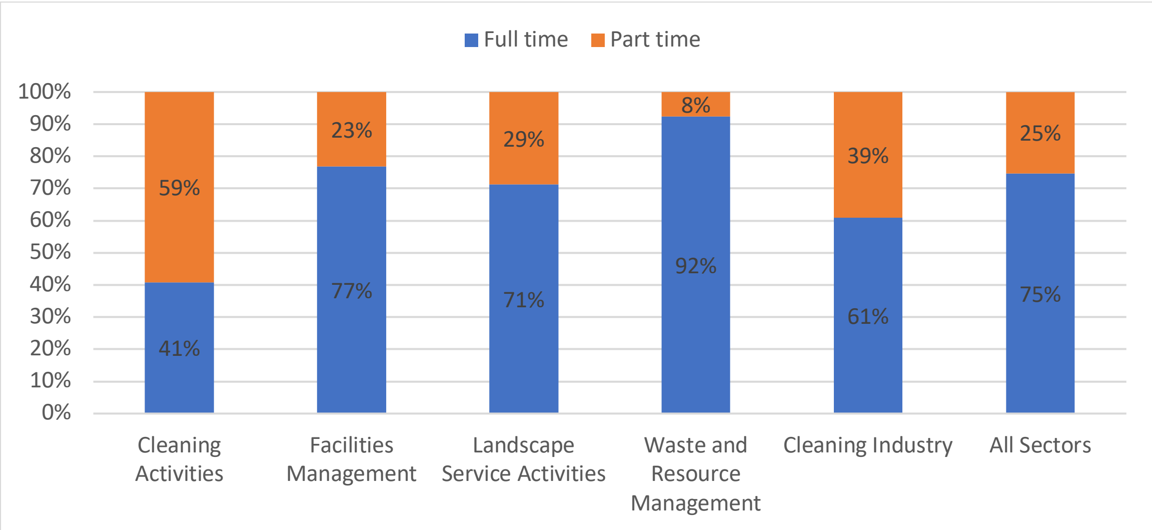
5.1 Flexible working

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 61% of the workforce. However, there are notable differences across the sub-industries (Figure 7). Three in five (59%) 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 2020

5.2 Pay

The Government wants to move away from a low wage, high tax, high welfare society to a higher wage, lower tax, lower welfare society (DfBEIS 2016). The national minimum wage is one way in which 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*
	25 and over	21 to 24	18 to 20	Under 18	Apprentice		
April 2016	£7.20	£6.95	£5.55	£4.00	£3.40	£9.75	£8.45
April 2017	£7.50	£7.05	£5.60	£4.05	£3.50	£10.20	£8.75

April 2018	£7.83	£7.38	£5.90	£4.20	£3.70	£10.55	£9.00
April 2019	£8.21	£7.70	£6.15	£4.35	£3.90	£10.75	£9.30
April 2020	£8.72	£8.20	£6.45	£4.55	£4.15	£10.85	£9.50
April 2021	£8.91	£8.36	£6.56	£4.62	£4.30	*	*

Source (GOV.UK 2021) * not available

5.2.1 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 2020 is shown below. All sub-industries, bar waste collection, saw an increase in average hourly wage between 2019 and 2020.

Table 9 Average hourly paid for FT employees by industry

SIC	Definition	2017	2018	2019	2020	Annual % change
81.2	Cleaning Activities	£9.57	£9.18	£9.81	£10.50	7.1%
81.1	Combined facilities support activities	£12.94	£13.18	£13.43	£13.82	2.9%
81.3	Landscape Service Activities	£9.51	£10.16	£10.40	£10.54	2.6%
38.0	Waste collection, treatment and disposal activities; materials recovery	£11.73	£12.09	£13.10	£12.75	-2.7%
	All employees	£14.00	£14.37	£14.90	£15.14	1.6%

Source Annual Survey of Hours and Earnings 2020 Provisional (ONS 2020)

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

The Association of Building Cleaning Direct (Service Providers) (ABCD) reported that local government terms and conditions (Green Book), which set out the national agreement on pay and conditions of service for local government services, can impact on their ability to be competitive. For example, previously local authority (LA) schools would have to use LA cleaning services, but with the move to academy schools and the ability to procure their own services, there is greater competition. Furthermore, multi-partnered academies are also expanding geographically which means LAs cannot bid for work for them if they cannot cover all the locations.

With LAs paying enhanced packages (i.e., UK Living Wage, employer pension contributions of around 20%) this means that their staff costs can be much greater and consequently competing on cost alone for contracts is not possible.

6 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.

6.1 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).

6.1.1 Market value

Cleaning and hygiene activities contributed over £9bn to the economy in 2018. Turnover has increased 21% since 2013, which is greater than all economy growth in which turnover increased by 13% (ONS 2020).

All three activities saw growth:

- General cleaning of buildings generated turnover of £6.3bn (69% of the total), which increased 14% since 2013.
- Other building and industrial cleaning activities saw an increase in turnover of 16% in the same time period and generated £865m.
- Other cleaning activities saw the largest increase in turnover (60%) since 2013. It accounted for 22% of the sub-industry total at over £2bn.

6.1.2 Businesses and the workforce

There are 21,625 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 2019, 2,560 new businesses started up in this sub-industry. This was a decline on the previous year which saw 3,045 new openings. The sub-industry saw 2,525 businesses stop trading in 2019. Meaning that there was a net increase in businesses. The 5-year survival rate of companies in this sub-industry is 42.8%, which is in line with all businesses (42.5%).

450,000 individuals work in the cleaning and hygiene activities sub-industry (ONS 2020). This is a decrease of -5% 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 61% of the workforce.
- Window cleaning and hygiene operatives - 7% of the workforce.
- Cleaning and housekeeping managers and supervisors – 5% of the workforce.
- Industrial cleaning process occupations– 3% of the workforce.

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

- The dominance of female workers (77%) 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 73% 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 6% working in the sub-industry are managerial or senior officials.
- Migrant workers account for a third (32%) of workers in the general cleaning of buildings, compared to just 17% 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	23%	73%	42%	**31%**
	Female	77%	27%	58%	**69%**
Age	Under 25	4%	10%	*	**4%**
	25 – 54 yrs.	67%	65%	83%	**69%**
	55 + yrs.	29%	26%	17%	**27%**
	Full-time	33%	77%	55%	**41%**
	Part-time	67%	23%	45%	**59%**
Qualifications	Below L2	54%	45%	42%	**51%**
	Level 2 & 3	26%	49%	36%	**30%**
	Level 4+	20%	6%	22%	**19%**
Migrants	UK Born	68%	90%	74%	**71%**
	Overseas	32%	10%	26%	**29%**

Source Labour Force Survey Apr-June 2020

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	6%	6%	4%	**6%**	**11%**
Professional Occupations	<1%	<1%	3%	**<1%**	**22%**
Associate Professional and Technical Occupations	1%	3%	2%	**1%**	**15%**
Administrative and Secretarial Occupations	3%	2%	6%	**3%**	**10%**
Skilled Trades Occupations	2%	2%	9%	**3%**	**10%**
Caring, Leisure and Other Service Occupations	11%	0%	14%	**10%**	**9%**
Sales and Customer Service Occupations	<1%	<1%	<1%	**<1%**	**7%**
Process, Plant and Machine Operatives	2%	2%	8%	**3%**	**6%**
Elementary Occupations	75%	84%	54%	**73%**	**10%**

Source Labour Force Survey Apr-June 2019

6.2 Facilities Management

Facilities Management (FM) is the management of services that support the core business of commercial or institutional buildings. Good facilities management makes a huge difference to the efficiency and productivity of a company, its staff and even its clients. It is the discipline that ensures 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).

6.2.1 Market value

In 2018, the UK FM industry had a turnover of over £27bn, up from £20.8bn in 2013 – a 26% increase. This is much greater than the overall economy growth in which turnover increased by 13% (ONS 2020).

All three activities saw growth:

- Management of real estate on a fee or contract basis generated turnover of £11.6bn (43% of the sub-industry the total) in 2018. This activity saw an increase in turnover of 26% since 2013.
- Renting and leasing of office machinery and equipment saw turnover increase by 22% between 2013 and 2018. Turnover stood at £705m.
- Combined facilities support activities saw an increase in turnover of 35% since 2013. It accounted for 55% of the sub-industry total at £14.9bn.

6.2.2 Businesses and the workforce

There are 21,120 businesses in this sub-industry, which accounts for a third (32%) of all businesses in the cleaning industry. 80% 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.

307,000 individuals work in the FM sub-industry. Since 2015 employment numbers have remained relatively stable, with employment growth of 6% recorded. The majority (63%) of the workforce are employed within combined facilities support activities, with a further third (36%) working within the management of real estate.

The top four occupations in the sub-industry are:

- Property, housing and estate managers, accounting for 26% of the workforce.
- Other administrative occupations – 7% of the workforce.
- Construction and building trades N.E.C. – 4% of the workforce.
- Production managers and directors in construction – 4% 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 2% are under the age of 25, but conversely nearly four in ten (33%) are over the age of 55.
- The sub-industry is highly qualified with 48% 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 40% are in managerial or senior positions and 11% 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	49%	58%	**56%**
	Female	51%	42%	**44%**
Age	Under 25	2%	<1%	**2%**
	25 – 54 yrs.	71%	62%	**66%**
	55 + yrs.	27%	38%	**33%**
	Full-time	73%	79%	**77%**
	Part-time	27%	21%	**23%**
Qualifications	Below L2	12%	21%	**18%**
	Level 2 & 3	28%	37%	**34%**
	Level 4+	60%	42%	**48%**
Migrants	UK Born	77%	85%	**82%**
	Overseas	23%	15%	**18%**

Source Labour Force Survey Apr-June 2020 * 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	39%	42%	**40%**	**11%**
Professional Occupations	13%	8%	**11%**	**22%**
Associate Professional and Technical Occupations	19%	9%	**12%**	**15%**
Administrative and Secretarial Occupations	18%	15%	**16%**	**10%**
Skilled Trades Occupations	7%	12%	**10%**	**10%**
Caring, Leisure and Other Service Occupations	3%	2%	**2%**	**9%**
Sales and Customer Service Occupations	<1%	1%	**1%**	**7%**
Process, Plant and Machine Operatives	<1%	3%	**2%**	**6%**
Elementary Occupations	1%	9%	**6%**	**10%**

Source Labour Force Survey Apr-June 2019 * data not available for renting and leasing of equipment SIC 77.33.

6.3 Landscape activities

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

6.3.1 Market value

In 2018, the UK landscape activities had a turnover of £5.1bn, up from £3.6bn in 2013 – a 43% increase. This is much greater than the all-economy growth in which turnover increased by 13% (ONS 2020).

6.3.2 Businesses and the workforce

There are 19,560 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 20%, from 16,335. 95% of businesses are micro – employing less than 10 people, and fewer than 1% employ more than 50+ individuals.

In 2019, 1,560 new businesses started up in this sub-industry. This was a decrease on the previous year which saw 1,775 new openings. The sub-industry saw 1,435 businesses stop trading in 2019.

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.

90,000 individuals work in the landscape activities sub-industry. This sub-industry has seen employment levels increase 45% between 2018 and 2019. 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. 82% of the workforce are male compared to an UK all sector figure of 52%.
- Two in five (39%) do not hold a level 2 qualification.
- Four in five (84%) work in roles classified as skilled trade occupations.

Table 14 Workforce characteristics across the landscape activities

	%	Landscape activities	All sectors
Gender	Male	82%	52%
	Female	18%	48%
Age	Under 25	13%	11%
	25 – 54 yrs.	55%	68%
	55 + yrs.	31%	21%
	Full-time	71%	75%
	Part-time	29%	25%
Qualifications	Below L2	39%	19%
	Level 2 & 3	40%	34%
	Level 4+	22%	47%
Migrants	UK Born	90%	88%
	Overseas	10%	12%

Source Labour Force Survey Apr-June 2020

Table 15 Occupation profile in landscape activities

	Landscape activities	All sectors
Managers, Directors and Senior Officials	2%	**11%**
Professional Occupations	2%	**22%**
Associate Professional and Technical Occupations	2%	**15%**
Administrative and Secretarial Occupations	5%	**10%**
Skilled Trades Occupations	84%	**10%**
Caring, Leisure and Other Service Occupations	1%	**9%**
Sales and Customer Service Occupations	5%	**7%**
Process, Plant and Machine Operatives	2%	**6%**
Elementary Occupations	2%	**10%**

Source Labour Force Survey Apr-June 2020

6.4 Waste and resource management

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

There are two key activities in this sub-industry:

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

6.4.1 Market value

The waste and resource management sub-industry generated a turnover of nearly £14bn in 2018. This was an increase of 31% since 2013, which is much greater than all economy growth in which turnover increased by 13% (ONS 2020).

There was growth across both activities:

- Waste collection contributed 66% of the sub-industry turnover at nearly £9.2bn. This area saw turnover increase by 38% since 2013.
- Waste treatment and disposal accounted for a third (34%) of the sub-industry total turnover, with turnover increasing from nearly £4bn to £4.8bn between 2013 and 2018.

6.4.2 Businesses and the workforce

There are 4,110 businesses in this sub-industry, which accounts for 6% of all businesses in the cleaning industry. In this sub-industry, 71% are involved in the collection of waste and 29% in waste treatment and disposal (see annex Table 32).

77% of businesses are micro, employing less than 10 people, and just 1% employ more than 250+ individuals.

In 2019, 525 new businesses started up in this sub-industry. This was a slight decrease on the previous year which saw 560 new openings. The sub-industry saw 440 businesses stop trading in 2018. The 5-year survival rate of companies in waste collection is 40% and 38% for waste treatment and disposal, which is just below the all-businesses rate of 42%.

109,500 individuals work in the waste and resource sub-industry. Employment numbers have increased 6% between 2018 and 2019. 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:

- Large goods vehicle drivers accounting for 20% of the workforce.
- Refuse and salvage occupations - 19% of the workforce.
- Van drivers – 4% of the workforce.
- Other administrative occupations N.E.C. – 4% 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 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	83%	84%	**84%**
	Female	17%	16%	**16%**
Age	Under 25	3%	2%	**3%**
	25 – 54 yrs.	62%	77%	**70%**
	55 + yrs.	35%	20%	**27%**
	Full-time	86%	98%	**92%**
	Part-time	14%	2%	**8%**
Qualifications	Below L2	61%	36%	**48%**
	Level 2 & 3	28%	41%	**35%**
	Level 4+	11%	23%	**18%**
Migrants	UK Born	91%	93%	**92%**
	Overseas	9%	7%	**8%**

Source Labour Force Survey Apr-June 2020

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	8%	4%	**6%**	**11%**
Professional Occupations	<1%	16%	**9%**	**22%**
Associate Professional and Technical Occupations	<1%	5%	**3%**	**15%**
Administrative and Secretarial Occupations	1%	14%	**8%**	**10%**
Skilled Trades Occupations	1%	4%	**3%**	**10%**
Caring, Leisure and Other Service Occupations	<1%	1%	**1%**	**9%**
Sales and Customer Service Occupations	4%	6%	**5%**	**7%**
Process, Plant and Machine Operatives	37%	29%	**33%**	**6%**
Elementary Occupations	48%	20%	**33%**	**10%**

Source Labour Force Survey Apr-June 2020

6.4.3 Waste handled

Across England local authorities managed waste[1] remained steady at 25.6 million tonnes in 2019/20. (Defra 2021).

Around 8.5% of all local authority-managed waste was sent to landfill in 2019/20. This was equivalent to a total 2.2 million tonnes of waste. This was down 0.6 million tonnes (21.3 per cent) from 2018/19.

Around 45.4% 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).

10.9 million tonnes of local authority waste were sent for recycling in 2019/20. Amongst the 341 local authorities in England, there is considerable variation in 'household waste' recycling rates, ranging from 19% to 64% in 2019/20.

[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.

6.5 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

Some companies in the supply chain include:

- Bunzl Cleaning & Hygiene
- Jangro Ltd
- Nationwide Hygiene Supplies Ltd
- Socius Network Ltd
- Arco Limited
- PHS Direct
- SC Johnson (formerly DEB)
- Diversey UK Ltd
- Selden Research Limited
- Robert Scott and Sons Ltd
- Berry bpi
- Kimberly-Clark Professional
- Essity UK Ltd
- Northwood Hygiene Products Ltd

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.

7 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.

7.1 Property, housing and estate managers

193,800 individuals are employed within this highly skilled occupation. 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 50% reporting to have worked with the same employer for 10 or more years and 32% between 1 and 5 years.

17% 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.

Table 18 Property, housing and estate managers demographics

	%	**Property, housing and estate managers**	**All sectors**
Gender	Male	59%	52%
	Female	41%	48%
Age	Under 25	1%	11%
	25 – 54 yrs.	57%	68%
	55 + yrs.	42%	21%
Status	Employee	58%	85%
	Self-employed	39%	14%
	Full-time	64%	75%
	Part-time	36%	25%
Qualifications	Below L2	17%	19%
	Level 2 & 3	36%	34%
	Level 4+	47%	47%
Migrants	UK Born	87%	83%
	Overseas	13%	17%
Ethnicity	White	91%	88%
	BAME	9%	12%

Source Labour Force Survey Apr-June 2020

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).

7.2 Waste disposal and environmental services managers

Nearly 15,300 individuals are employed within this skilled occupation, receiving on average £21.73 per hour (ONS 2020). 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 66% reporting to have worked with the same employer for 10 or more years and 18% between 5 and 10 years.

Just 7% of workers report receiving job-related training or education in the last 3 months, which is slightly 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	90%	52%
	Female	10%	48%
Age	Under 25	<1%	11%
	25 – 54 yrs.	88%	68%
	55 + yrs.	12%	21%
Status	Employee	66%	85%
	Self-employed	34%	14%
	Full-time	93%	75%
	Part-time	7%	25%
Qualifications	Below L2	28%	19%
	Level 2 & 3	34%	34%
	Level 4+	37%	47%
Migrants	UK Born	91%	83%
	Overseas	9%	17%
Ethnicity	White	100%	88%
	BAME	<1%	12%

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).

7.3 Gardeners and landscape gardeners

Over 147,000 individuals work within this occupation.

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. Nearly a fifth (17%) of households employ gardeners as part of domestic help (Crouch 2016).

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 one in ten (10%) 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	84%	52%
	Female	16%	48%
Age	Under 25	11%	11%
	25 – 54 yrs.	60%	68%
	55 + yrs.	30%	21%
Status	Employee	33%	85%
	Self-employed	66%	14%
	Full-time	73%	75%
	Part-time	27%	25%
Qualifications	Below L2	35%	19%
	Level 2 & 3	41%	34%
	Level 4+	24%	47%
Migrants	UK Born	89%	83%
	Overseas	11%	17%
Ethnicity	White	94%	88%
	BAME	6%	12%

Source Labour Force Survey Apr-June 2020

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).

7.4 Pest control officers

The Labour Force Survey reports that there are nearly 6,000 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.

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.

Whilst a vital part of the industry, there is a reluctance to spend money on pest control. Prevention, especially in the domestic market is not a forethought for people and remains an issue. It is about having a pest problem then dealing with it, rather than considering ways to prevent pest infestations.

A BPCA survey of pest professionals on the impact Covid-19 is having on the sector found that 74% of open business are having contracts suspended or cancelled (Professional Pest Controller Magazine 2020). Over half (58%) also reported getting fewer domestic callouts.

The British Pest Control Association (BPCA) reports that recruitment of pest control workers is 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 BCPA, which has 500 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. However, after this there is no scope for progression. The BCPA want to move to get higher qualifications so people can move up the ladder. Higher qualifications mean the profession will get treated with more respect and be seen as professionals.

It is the unregulated side of this area that is a concern to BPCA. There is the danger of getting the wrong people in, who are not qualified to deal with the pest. For example, you get someone in to deal with a wasp nest and they spray toxic chemicals all over your house which can affect everyone living in the household. Furthermore, the public could potentially buy lethal insecticide chemicals; everyone has access to these professional strength chemicals which are incredibly dangerous if you are not aware of how to handle them. In B&Q and Wilkos, for example, rodenticides to poison rats and mice with are available, however the dosage is so low that you end up building and feeding resistance – you can kill one generation, but the next will be resistant. Professional advice needs to be sought.

However, procurement of such services can be an issue. There is too much focus on price not quality. There are standards for pest control cleaning – relates to IS014001 – but no one asks for it.

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

There are 49,500 individuals employed as a Housekeeper across the UK and a further 73,600 working as a cleaning or housekeeping manager or supervisor role.

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 and beverage services, Health, Social work, Services to buildings, Accommodation and Education.

Both occupations are dominated by female workers (

Table 21). 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 (38%%) of managers or supervisors are migrants. This is significantly greater than across all occupations where just 17% 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, 66% 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, 22% would have preferred a full-time position if they were able to find one.

Table 21 Housekeeper and related occupations demographics

		Housekeepers	Cleaning and housekeeping managers and supervisors	All sectors
Gender	Male	8%	28%	52%
	Female	92%	72%	48%
Age	Under 25	8%	2%	11%
	25 – 54 yrs.	44%	68%	68%
	55 + yrs.	47%	31%	21%
Status	Employee	86%	96%	85%
	Self-employed	14%	4%	14%
	Full-time	41%	71%	75%
	Part-time	59%	29%	25%
Qualifications	Below L2	42%	38%	19%
	Level 2 & 3	47%	32%	34%
	Level 4+	10%	30%	47%
Migrants	UK Born	80%	62%	83%
	Overseas	20%	38%	17%
Ethnicity	White	92%	84%	88%
	BAME	8%	16%	12%

Source Labour Force Survey Apr-June 2020

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.

A further challenge is training. Data from the Labour Force Survey indicates that just 11% of housekeepers received training in the last 3 months, with 16% for managers and supervisors. The UKHA highlights that there is a lack of up-to-date training available despite there being companies which are very good and invest in staff. These companies offer buddy systems to new staff which is one option where with a high migrant workforce, language can be a barrier particularly during training. Conventional training is often not appropriate and new innovative ways to deliver training are regularly being sought and introduced with, for example, pictorial images of right and wrong ways of working to ensure a greater understanding. More practical training linked to the establishment individuals are working in would be beneficial and are part of the industry's greater desire.

7.6 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 61% over the age of 55 (Table 22).

Table 22 Caretakers demographics

	%	**Caretakers**	**All sectors**
Gender	Male	84%	52%
	Female	16%	48%
Age	Under 25	3%	11%
	25 – 54 yrs.	36%	68%
	55 + yrs.	61%	21%
Status	Employee	99%	85%
	Self-employed	1%	14%
	Full-time	82%	75%
	Part-time	18%	25%
Qualifications	Below L2	52%	19%
	Level 2 & 3	36%	34%
	Level 4+	11%	47%
Migrants	UK Born	91%	83%
	Overseas	9%	17%
Ethnicity	White	94%	88%
	BAME	6%	12%

Source Labour Force Survey Apr-June 2020

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 and Beverage Services, Real Estate and Social Work.

One in five (20%) 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).

7.7 Industrial cleaning process occupations

23,200 individuals working 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 50% of workers are not qualified to a level 2. However, there are opportunities for young people with 24% of the workforce under 25 (Table 23).

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.

One in five (20%) 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.

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 23 Industrial cleaning process occupations demographics

	%	Industrial cleaning process occupations	All sectors
Gender	Male	67%	52%
	Female	33%	48%
Age	Under 25	24%	11%
	25 – 54 yrs.	52%	68%
	55 + yrs.	24%	21%
Status	Employee	97%	85%
	Self-employed	3%	14%
	Full-time	70%	75%
	Part-time	30%	25%
Qualifications	Below L2	50%	19%
	Level 2 & 3	42%	34%
	Level 4+	8%	47%
Migrants	UK Born	66%	83%
	Overseas	34%	17%
Ethnicity	White	80%	88%
	BAME	20%	12%

Source Labour Force Survey Apr-June 2020

7.8 Window cleaning and hygiene operatives

According to the Labour Force Survey (LFS) there are 27,000 window cleaning and hygiene operatives across the UK. However, it is estimated by the Federation of Window Cleaners (FWC) that there are around 225,000 window cleaning and hygiene operatives working in the UK. 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 (95%) of the workforce are self-employed and over half (51%) do not hold a level 2 qualification (Table 24). The job is not considered to be an easy job 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.

Table 24 Window cleaning and hygiene operatives demographics

	%	**Window Cleaners**	**All sectors**
Gender	Male	91%	52%
	Female	9%	48%
Age	Under 25	<1%	11%
	25 – 54 yrs.	69%	68%
	55 + yrs.	31%	21%
Status	Employee	5%	85%
	Self-employed	95%	14%
	Full-time	74%	75%
	Part-time	26%	25%
Qualifications	Below L2	51%	19%
	Level 2 & 3	46%	34%
	Level 4+	4%	47%
Migrants	UK Born	91%	83%
	Overseas	9%	17%
Ethnicity	White	96%	88%
	BAME	4%	12%

Source Labour Force Survey Apr-June 2020

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. There is no specific window cleaning apprenticeship available.

Location of training can also be an issue for some companies. There are courses held across the UK, but companies cannot always afford to send people, in terms of time away from the job and also the cost of attending. Therefore, much training is done 'on-the-job'. Health and safety is a key area, along with the use of water fed poles. 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.

Recognition of this part of the industry is low. When working on the commercial side, work is often done before offices open, so as not to disrupt clients. They are pretty much invisible, which can be demoralising for workers as people generally do not notice the work done, although they often notice any mistakes made.

7.9 Cleaning and hygiene operatives and domestics

There are over 511,000 individuals working 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 and Beverage Services, Health and Education.

The workforce is dominated by women (79%). Three quarters (76%) of the workforce work part-time. Of these working part-time 68% report they work part-time due to not wanting a full-time position, 8% report to being ill or disabled and 6% are students. The remaining 17% 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 £9.31 per hour, working on average 37.2hrs. But wages may range between £7.16 to £12.38 (ONS 2020).

Just 11% 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.

Table 25 Cleaning and hygiene operatives and domestics demographics

	%	Cleaning operatives and domestics	All sectors
Gender	Male	21%	52%
	Female	79%	48%
Age	Under 25	6%	11%
	25 – 54 yrs.	60%	68%
	55 + yrs.	34%	21%
Status	Employee	82%	85%
	Self-employed	18%	14%
	Full-time	24%	75%
	Part-time	76%	25%
Qualifications	Below L2	59%	19%
	Level 2 & 3	29%	34%
	Level 4+	13%	47%
Migrants	UK Born	73%	83%
	Overseas	27%	17%
Ethnicity	White	83%	88%
	BAME	17%	12%

Source Labour Force Survey Apr-June 2020

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).

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.

With Covid-19, cleaning and hygiene operatives are encouraged to take certain safety precautions when working in other people's homes. This includes wearing a face covering and keeping an appropriate social distance away from other members of the household.

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.

Covid-19 has impacted the commercial cleaning sector – both positively and negatively. Offices do not have full occupancy. For example The Canary Wharf financial complex, in London, has only about 6,000 people on site, against 100,000 pre-Covid (March 2021). This meant a huge change for companies who clean offices. There is no longer 5 day a week cleaning. Instead, there has been a shift to targeted cleaning for offices.

Similarly, at airports, restrictions on travel have seen airports close terminals. Gatwick, the UK's second busiest airport as of March 2021, was operating flights from the North Terminal only, with the South terminal closed and numerous airlines having suspended all flights due to Covid-19.

However, cleaning in healthcare and educational settings has increased to combat the spread of Covid-19.

7.10 Refuse and salvage occupations

26,600 individuals work in a refuse and salvage occupation. Nearly all workers are male, working full time.

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 £10.21 per hour, with hourly rates ranging from £8.78 to £12.09.

Table 26 Refuse and salvage occupations demographics

	%	Refuse and salvage occupations	All sectors
Gender	Male	100%	52%
	Female	<1%	48%
Age	Under 25	6%	11%
	25 – 54 yrs.	64%	68%
	55 + yrs.	30%	21%
Status	Employee	91%	85%
	Self-employed	9%	14%
	Full-time	91%	75%
	Part-time	9%	25%
Qualifications	Below L2	78%	19%
	Level 2 & 3	22%	34%
	Level 4+	<1%	47%
Migrants	UK Born	95%	83%
	Overseas	5%	17%
Ethnicity	White	95%	88%
	BAME	5%	12%

Source Labour Force Survey Apr-June 2020

Just 7% 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.

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).

7.11 Vehicle valeters and cleaning and hygiene operatives

There are 28,000 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.

The Car Wash Advisory Service estimates that there are 26,900 hand, mobile and contract valeting washes across the UK, and 90% of them have significant issues with modern slavery, environmental damage, health and safety and tax evasion (CWAS 2019).

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 61% 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).

Key skills for working as car washers includes the ability of team members to multi-task and work quickly.

Table 27 Vehicle valeters and cleaning and hygiene operatives' demographics

	%	**Vehicle valeters and cleaning and hygiene operatives**	**All sectors**
Gender	Male	84%	52%
	Female	16%	48%
Age	Under 25	14%	11%
	25 – 54 yrs.	68%	68%
	55 + yrs.	17%	21%
Status	Employee	73%	85%
	Self-employed	27%	14%
	Full-time	85%	75%
	Part-time	15%	25%
Qualifications	Below L2	59%	19%
	Level 2 & 3	31%	34%
	Level 4+	9%	47%
Migrants	UK Born	61%	83%
	Overseas	39%	17%
Ethnicity	White	95%	88%
	BAME	5%	12%

Source Labour Force Survey Apr-June 2020

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).

8 Recruitment and Skills

8.1 Recruitment and vacancies

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.

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

The Employer Skills Survey reveals some insight into the recruitment of key occupations in the industry Employers were asked if any of their vacancies were proving hard to fill, and if so if this was due to a lack of skills, experience or qualifications among applicants. This measures skill-shortages vacancies of which employers are aware.

The experience of skill-shortage vacancies varied by occupation (Table 28). Nearly half (48%) of all gardener and landscapers' vacancies were classed as skill shortage vacancies compared to just 7% of cleaning and housekeeping managers and supervisors' vacancies. Caretaker positions were also roles where employers reported difficulties with recruitment, with 37% of vacancies skills shortages vacancies.

To note, the Employer Skills Survey was undertaken pre-covid and with unemployment rising to 5% (ONS 2021), recruitment pressures may have eased. However, during our interviews it was questioned whether people would stay in their new role.

Table 28 Hard to fill and skills Shortage vacancies (2019)

	Hard-to-fill vacancies	**Skills Shortage Vacancies**	**% of HtF that are SSV**
1251 Property, housing and estate managers	33%	20%	61%
5113 Gardeners and landscape gardeners	56%	48%	85%
6231 Housekeepers and related occupations	38%	14%	37%
6232 Caretakers	47%	37%	78%
6240 Cleaning and housekeeping managers and supervisors	27%	7%	28%
9233 Cleaning and hygiene operative and domestics	28%	12%	43%
All occupations	36%	24%	66%

Source Employer Skills Survey (Department for Education 2021)

The cleaning and hygiene industry is a multibillion-pound industry, yet there are recruitment and turnover issues. The pay rates and poor conditions of service is not always conducive for attracting people into the industry. However, companies that have attractive packages (i.e., living wage, enhanced pension schemes) report less of an issue with recruitment and turnover.

In affluent areas it can be harder to recruit cleaning and hygiene operatives. The cost of living in such areas is undoubtedly a factor.

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.

8.2 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.

With a high proportion of migrants, there are English as a Second Language (ESOL) problems. Many people in the industry do not speak English as their first language and some have very little understanding of English. Employers therefore tend to put Same-Language people together, so one who speaks English can supervise the others, rather than trying to tackle the problem of the lack of English.

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.

Delivery of training has altered significantly over the last year. Covid-19 has meant the closure of training centres and limited to option for face-face training. Consequently, there has been a greater need for online learning and assessment. 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.

WAMITAB reported that across the education sector, there has been an increased demand for infection control courses and training.

Covid-19 has seen a further push to ensure that cleaning, sanitising and disinfecting is undertaken effectively, with the correct chemicals. People must understand surfaces and the importance of touch points.

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

8.3 Apprenticeships in the industry

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

There are a number of apprenticeships available in the industry (Table 29).

Previous concern 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.

Table 29 Apprenticeship starts (England)

Standard	Level	2018 - 19	2019 - 20	2020 -21*
Facilities Management**	**2**	500	90	~
Facilities Management**	**3**	70	60	~
Facilities Management**	**4**	10	~	n/a
Facilities Services Operative	**2**	20	200	60
Facilities Management Supervisor	**3**	380	420	60
Facilities Manager	**4**	170	220	40
Senior and Head of Facilities Management (Integrated Degree)	**6**	n/a	~	
Cleaning and Support Service Industry**	**2**	470	160	~
Cleaning and Support Service Industry**	**3**	70	20	~
Healthcare Cleaning Operative	**2**	-	20	50
Waste Resource Operative	**2**	60	50	30

Source (Gov.UK 2021)

*Figures for 2020/21 are provisional quarter 1 data reported to date (Aug to Oct 2020). All other years are final, full year figures

Volumes are rounded to the nearest 10 and '~' indicates a base value of fewer than 5 but greater than 0

** Framework were withdrawn to new learners on 31 July 2020. Learners who started on frameworks are where it has been agreed a learner can return to a previous framework, they have been on after an extensive break

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.

However, whilst there remains no general cleaning apprenticeship route, the British Cleaning Council and the All Party Parliamentary Group now has a strategic plan to seek change through Government recognition.

8.4 Associations and professional bodies

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

Table 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 and 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
Environmental Services Association (ESA)	www.esauk.org
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
United Kingdom Housekeepers Association	www.ukha.co.uk
Waste Management Industry Training and Advisory Board (WAMITAB)	www.wamitab.org.uk/
Worshipful Company of Environmental Cleaners	www.wc-ec.com

9 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.

9.1 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

9.2 Sickness

The UK sickness absence rate has fallen to 1.8% in 2020; this is the lowest recorded level since the data time series began in 1995 (ONS 2021). 118.6 million working days were lost because of sickness or injury in the UK in 2020, equating to 3.6 days lost per worker.

The coronavirus (Covid-19) pandemic has affected the sickness absence data in a number of ways; while the virus may have led to additional sickness absence, measures such as furloughing, social distancing, shielding and increased homeworking appear to have helped reduce other causes of absence, allowing the general downward trend to continue.

Cleaning companies are often regarded as unsympathetic to illness. The Equality and Human Rights Commission Research report 'Coming clean: the experience of cleaning operatives' found that most respondents who took part in their research had a very unsure grasp of where they stood in relation to sick leave and pay (Sykes, et al. 2014). Many respondents said that they tried not to be off when they were unwell because they did not want to lose pay or risk losing their job. Some operatives had gone to work in spite of being particularly unwell. Only a few had received clear information about sickness and absence procedures and practice (Sykes, et al. 2014).

The very nature of cleaning work itself (working with chemicals, heavy lifting, repetitive tasks etc) can also cause higher sickness and absence in the industry. UNISON reports that cleaning and hygiene operatives are one group of its members who regularly suffers health and safety incidents, accidents and ill-health at work.

There is growing awareness of the need to invest in the wellbeing of staff. Those who are doing this are seen as an employer of choice, thereby reducing staff turnover. It also helps to win bids as it demonstrates investment in staff.

9.3 Industrial accidents and work-related illness

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

- There were 111 fatal injuries in GB (HSE 2020). Of these:
  - 5 fatal injuries were within Waste collection, treatment and disposal activities; materials recovery (SIC 38).
  - 4 were within Services to buildings and landscape activities (SIC 81).
- 65,427 non-fatal injuries to workers were reported via RIDDOR across all industries.
  - 1,598 were reported within Waste collection, treatment and disposal activities; materials recovery.
  - 2,111 non-fatal injuries were reported by employers in Services to buildings and landscape activities (SIC 81).

The consequences of industrial accidents can be significant. For example, a waste recycling company has been fined £1.275m after an employee lost part of his arm in a conveyor belt. An investigation by the Health and Safety Executive revealed that the company had failed to prevent access to dangerous parts of the conveyor. The castell key system had essentially been bypassed allowing the system to be operated in automatic mode with persons still inside the enclosure (StallardKane 2019).

The HSE is calling on all those working in the waste and recycling industry to pay closer attention to how they manage workplace risk. It has a range of free guidance to help employers prepare for inspections and manage workplace risks on their website. The priorities are to reduce the number:

- of people being struck by moving vehicles.
- of workers being caught in moving machinery.
- of ill-health cases.

10 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.

10.1 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.

Amongst the aims listed by the BCC for the group are:

- Recognition that all cleaning and hygiene staff should and must be considered key and essential workers.
- The creation of a recognised and universal training accreditation for cleaning and hygiene within the UK.
- Promotion of the real Living Wage
- Highlighting well-being and mental health awareness and commitment by the industry to full compliance of the Modern Slavery Act, within the UK cleaning industry and its supply chain.
- Commitment to accelerate the industry's progress to the UK Government's sustainability and environmental targets and contribute positively towards the Government's 2050 zero emissions target.
- Recognition of the important role of regulated cleaning and disinfection products, including parliamentary support in respect of the EU Regulations effect on distribution and in particular availability for the Northern Ireland market.

The APPG is a key opportunity for industry to keep hygiene in the spotlight.

Immigration Act

The Government introduced the Immigration and Social Security Co-ordination (EU Withdrawal) Bill (the bill) in the House of Commons on 5 March 2020 (Gov.UK 2020). The Bill will end free movement and pave the way for "a modern, fairer points-based immigration system that will welcome skilled workers from across the world to contribute to the United Kingdom's economy, communities and public services." This new points-based immigration system begins operating from January 2021.

Individuals must meet a number of requirements to be eligible for a Skilled Worker visa and be an eligible occupation. Cleaning, however, is not currently recognised as a skilled role (Gov.UK 2020). The All Party Parliamentary Group for the UK Cleaning and Hygiene Industry will be reviewing and acting upon the recognition of the training needs and qualifications as the availability of labour could be a problem.

United Voices of the World (UVW)

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

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

A number of campaigns and strikes have included cleaning and hygiene operatives to win pay, rights and conditions for their members.

10.2 Economic

Brexit

The free trade deal between the UK and European Union (EU) came into force on 1 January 2021. The trade deal that was agreed prevented any tariffs and quotas which would have made it more expensive to trade being introduced.

However, not everything is the same as it was before Brexit.

As the UK no longer has to follow EU rules on product standards, businesses will need to get used to new checks. This means more paperwork, which could cause delays if businesses turn up at ports unprepared. This could impact the supply chain.

The deal also does not completely eliminate the possibility of tariffs in future. Both sides will need to stay close to shared rules in areas like workers' rights and environmental protection. If either the UK or the EU shift their rules too far, the other side could introduce tariffs.

Contracting

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

As labour costs tend to make up the largest part of the costs of a company, there is a risk that unscrupulous employers will seek to gain an unfair advantage in tendering processes by illegal employment practices such as not paying full social insurance costs or employing illegal labour. Or it can result in contracts being revised downwards, with reductions in services or frequencies. This may result in the dropping of standards, which would not be to the satisfaction of customers or providers.

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

10.3 Social

Public Facilities

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

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. Some people report becoming prisoners – i.e., those with Crohns disease feel that they cannot leave the house if they do not know where they can access a toilet. Some older people report not being able to travel more than five miles as they need to have access to toilets.

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.

10.4 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.

10.5 Environmental

Sustainable packaging

Businesses or organisations which produces 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 '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, 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 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.

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12 Annex: Data Tables

12.1 Turnover

Table 31 Turnover (£ million)

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018 (R)	% change 2013 - 18
Cleaning Activities	81.21	General cleaning of buildings	5,000	5,614	5,603	5,526	5,989	5,279	5,552	6,249	6,305	14%
	81.22	Other building and industrial cleaning activities	766	744	745	745	870	683	796	912	865	16%
	81.29	Other cleaning activities	1,545	1,502	1,350	1,257	1,437	1,532	1,724	1,888	2,007	60%
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	11,605	26%
	77.33	Renting and leasing of office machinery and equipment	720	630	732	578	602	564	758	727	705	22%
	81.10	Combined facilities support activities	9,853	9,272	10,285	11,034	11,280	12,812	14,572	15,593	14,919	35%
Landscape Service Activities	81.30	Landscape service activities	3,015	3,403	3,461	3,593	3,538	3,936	4,546	4,449	5,122	43%
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	8,862	39%
	38.12	Collection of hazardous waste	132	154	154	289	170	149	182	244	313	8%
	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	3,807	13%
	38.22	Treatment and disposal of hazardous waste	315	431	432	612	597	792	1,132	1,072	991	62%
			37,200	**39,191**	**40,958**	**42,584**	**45,405**	**48,370**	**50,534**	**54,861**	**55,501**	30%

Source Annual Business Survey (ONS 2020), R- Revised data

12.2 Businesses

Table 32 UK Business Count - enterprises, 2010 - 2020

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
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
	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
	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
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
	77.33	Renting and leasing of office machinery and equipment	425	395	370	355	420	445	455	440	440	440	450
	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
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
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
	38.12	Collection of hazardous waste	55	80	100	105	115	120	115	125	125	125	135
	38.21	Treatment and disposal of non-hazardous waste	640	700	795	905	925	935	960	1,075	1,075	1,075	1,080
	38.22	Treatment and disposal of hazardous waste	40	50	65	85	90	105	110	115	115	115	125
			45,970	**44,955**	**47,020**	**47,665**	**49,810**	**56,975**	**59,265**	**60,870**	**63,490**	**64,765**	**66,420**

Source NOMIS UK Business Count – enterprises by industry and employment size band (ONS 2020)

Table 33 Businesses in the Industry by nation and region, 2010 - 2020

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

Source NOMIS UK Business Count – enterprises by industry and employment size band (ONS 2020)

Table 34 UK Business by size, 2020

			Micro		Small	Medium		Large	
Sub-Industry	**SIC**	**Definition**	**0 to 4**	**5 to 9**	**10 to 49**	**50 to 99**	**100 to 249**	**250+**	
Cleaning Activities	81.21	General cleaning of buildings	6,950	2,320	2,255	340	240	195	**12,295**
	81.22	Other building and industrial cleaning activities	2,740	430	305	30	20	15	**3,540**
	81.29	Other cleaning activities	4,030	990	660	60	35	20	**5,790**
Facilities Management	68.32	Management of real estate on a fee or contract basis	13,770	2,125	1,170	75	45	45	**17,230**
	77.33	Renting and leasing of office machinery and equipment	325	65	50	10	5	0	**450**
	81.10	Combined facilities support activities	2,640	325	300	60	45	70	**3,440**
Landscape Service Activities	81.30	Landscape service activities	16,635	1,940	895	65	15	10	**19,560**
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	1,810	370	470	70	30	25	**2,770**
	38.12	Collection of hazardous waste	90	20	15	5	0	0	**135**
	38.21	Treatment and disposal of non-hazardous waste	630	155	210	45	30	10	**1,080**
	38.22	Treatment and disposal of hazardous waste	80	15	20	5	0	5	**125**
		Total	**49,700**	**8,755**	**6,340**	**765**	**465**	**390**	**66,420**
		%	**75%**	**13%**	**10%**	**1.2%**	**0.7%**	**0.6%**	**100%**

Source NOMIS UK Business Count – enterprises by industry and employment size band (ONS 2020)

Table 35 Business public or private

			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	8,225	3,255	760	55	0
	81.22	Other building and industrial cleaning activities	2,485	895	155	5	0
	81.29	Other cleaning activities	4,505	1,050	220	10	0
Facilities Management	68.32	Management of real estate on a fee or contract basis	15,300	860	625	415	25
	77.33	Renting and leasing of office machinery and equipment	405	25	20	5	0
	81.10	Combined facilities support activities	3,120	175	50	90	5
Landscape Service Activities	81.30	Landscape service activities	10,605	7,340	1,540	70	5
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	2,320	345	75	25	0
	38.12	Collection of hazardous waste	115	15	0	0	0
	38.21	Treatment and disposal of non-hazardous waste	940	85	40	10	5
	38.22	Treatment and disposal of hazardous waste	115	5	5	5	5
		Total	**48,135**	**14,055**	**3,490**	**690**	**45**
		%	**72%**	**21%**	**5%**	**1%**	**<1%**

Source NOMIS UK Business Count – enterprises by industry and employment size band (ONS 2020)

Table 36 Count of births of new enterprises for 2010 to 2019

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
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
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
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
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
	38.2	Treatment and disposal of non-hazardous waste Treatment and disposal of hazardous waste	145	165	225	165	130	140	175	170	175	135
Total			**3,490**	**3,865**	**4,080**	**5,005**	**4,850**	**5,400**	**5,745**	**6,930**	**5,940**	**5,190**

Source Business Demography – 2019 Enterprise Births, Deaths and Survivals Table 1.2 (ONS 2020)

Table 37 Count of deaths of new enterprises for 2010 to 2019

Sub-Industry	SIC	Definition	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
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	2425	2975	2525
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	420	420
Landscape Service Activities	81.3	Landscape service activities	1,390	1,250	1,340	1,275	1,265	1,315	1,335	1365	1285	1435
Waste and Resource Management Industry	38.1	Collection of non-hazardous waste Collection of hazardous waste	195	265	280	325	330	310	275	265	265	310
	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
Total			**4,145**	**3,850**	**4,160**	**4,050**	**4,075**	**4,640**	**4,765**	**4,710**	**5,065**	**4,820**

Source Business Demography – 2019 Enterprise Births, Deaths and Survivals Table 1.2 (ONS 2020)

Table 38 Survival of newly born enterprises by births of units in 2014 (%)

Sub-Industry	SIC	Definition	No of Births (2014)	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	2,685	93.3	75.4	60.5	48.6	42.8
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	91.4	75.2	59	48.6	42.9
Landscape Service Activities	81.30	Landscape service activities	1,170	94.4	80.3	69.2	62	54.3
Waste and Resource Management Industry	38.1	Collection of non-hazardous waste Collection of hazardous waste	335	89.6	68.7	53.7	44.8	40.3
	38.2	Treatment and disposal of non-hazardous waste Treatment and disposal of hazardous waste	130	88.5	69.2	57.7	46.2	38.5
Cleaning Industry Total			**4,845**	**93**	**76**	**61.9**	**51.5**	**45.3**
All Businesses			**350,305**	**92.2**	**75.8**	**61.2**	**49.3**	**42.5**

Source Business Demography – 2019 Enterprise Births, Deaths and Survivals Table 5.2a (ONS 2020)

12.3 Employment

Table 39 Employment (GB)

Sub-Industry	SIC	Definition	2015	2016	2017	2018	2019	% Change 2015 - 2019
Cleaning Activities	81.21	General cleaning of buildings	386,000	362,000	361,000	386,000	372,000	-4%
	81.22	Other building and industrial cleaning activities	25,000	23,000	23,000	28,000	26,000	4%
	81.29	Other cleaning activities	51,000	49,000	51,000	58,000	52,000	2%
Facilities Management	68.32	Management of real estate on a fee or contract basis	104,000	97,000	105,000	112,000	113,000	9%
	77.33	Renting and leasing of office machinery and equipment	3,500	3,000	3,000	3,500	4,000	14%
	81.10	Combined facilities support activities	183,000	195,000	186,000	199,000	190,000	4%
Landscape Service Activities	81.30	Landscape service activities	72,000	72,000	81,000	62,000	90,000	25%
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	59,000	71,000	65,000	77,000	72,000	22%
	38.12	Collection of hazardous waste	1,000	1,500	4,000	2,250	1,500	50%
	38.21	Treatment and disposal of non-hazardous waste	28,000	32,000	41,000	37,000	29,000	4%
	38.22	Treatment and disposal of hazardous waste	7,000	7,000	7,000	8,000	7,000	0%
		Total	**920,000**	**912,000**	**928,000**	**972,000**	**957,000**	**4%**

Source NOMIS Business Register and Employment Survey (ONS 2020)

Table 40 Employment by nation and region

	2015	2016	2017	2018	2019	Growth 2015-2019
East of England	100,000	106,000	106,000	115,000	110,000	10%
East Midlands	47,000	40,000	41,000	46,000	48,000	2%
London	198,000	187,000	175,000	196,000	188,000	-5%
North East	31,000	29,000	33,000	35,000	28,000	-10%
North West	100,000	105,000	110,000	95,000	89,000	-11%
Scotland	86,000	86,000	85,000	78,000	87,000	1%
South East	133,000	147,000	131,000	139,000	143,000	8%
South West	64,000	64,000	67,000	76,000	69,000	8%
Wales	30,000	28,000	30,000	33,000	33,000	10%
West Midlands	65,000	64,000	81,000	91,000	91,000	40%
Yorkshire and Humber	66,000	56,000	70,000	66,000	70,000	6%

Source NOMIS Business Register and Employment Survey (ONS 2020)

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

Sector	Number employed	% UK employment
Q Health and social work	3,971,000	13%
G Wholesale, retail, repair of vehicles	2,863,000	9%
M professional, scientific, technical activities	2,741,000	9%
N Business administration and support services	2,701,000	9%
P Education	2,607,000	8%
C Manufacturing	2,424,000	8%
I Accommodation and food services	2,370,000	8%
F Construction	1,563,000	5%
H Transport and storage	1,506,000	5%
Cleaning Industry	**1,472,600**	**5%**
Total UK employment	**31,088,000**	

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

12.4 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	4%	18%	22%	29%	22%	4%
Facilities Management	2%	23%	24%	19%	21%	12%
Landscape Service Activities	13%	14%	16%	25%	24%	7%
Waste and Resource Management Industry	3%	26%	23%	21%	20%	7%
All Cleaning Industry	**5%**	**19%**	**21%**	**25%**	**22%**	**7%**
All sectors	**11%**	**23%**	**22%**	**23%**	**17%**	**4%**

Source Labour Force Survey Apr-June 2020 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division 2020)

Table 44 Country of birth (%)

Sub-Industry	UK	Europe	Other
Cleaning Activities	71%	15%	14%
Facilities Management	82%	5%	13%
Landscape Service Activities	90%	7%	4%
Waste and Resource Management Industry	92%	6%	3%
All Cleaning Industry	**80%**	**10%**	**10%**
All sectors	83%	8%	9%

Source Labour Force Survey Apr-June 2020 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division 2020)

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

Nation / Region	Cleaning Industry	All sector
Scotland	7%	12%
Wales	6%	7%
Northern Ireland	15%	9%
East of England	21%	16%
East Midlands	3%	15%
London	55%	38%
North East	5%	7%
North West	7%	12%
South East	21%	18%
South West	7%	11%
West Midlands	18%	14%
Yorkshire and The Humber	13%	10%

Source Labour Force Survey Apr-June 2020 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division 2020)

Table 46 Ethnicity (%)

Sub-Industry	White	BAME
Cleaning Activities	83%	17%
Facilities Management	81%	19%
Landscape Service Activities	96%	4%
Waste and Resource Management Industry	94%	6%
All Cleaning Industry	**86%**	**14%**
All sectors	**88%**	**12%**

Source Labour Force Survey Apr-June 2020 (Northern Ireland Statistics and Research Agency, Central Survey Unit, Office for National Statistics, Social Survey Division 2020)

12.5 Pay

Table 47 Hourly paid for all employees by industry, 2020

Sub-Industry	SIC	Definition	Number of jobs	Average Pay	Annual % change	Pay Range
Cleaning Activities	81.21	General cleaning of buildings	235,000	£9.00	5.9%	£6.98 to £15.09
	81.22	Other building and industrial cleaning activities	13,000	£9.04	-1.1%	*
	81.29	Other cleaning activities	29,000	£9.45	-5.5%	£7.39 to £11.26
Facilities Management	68.32	Management of real estate on a fee or contract basis	66,000	£13.92	3.0%	£8.99 to £21.51
	77.33	Renting and leasing of office machinery and equipment	*	£13.62	-8.4%	*
	81.10	Combined facilities support activities	141,000	£12.07	5.4%	£8.74 to £21.82
Landscape Service Activities	81.30	Landscape service activities	48,000	£10.51	1.1%	£7.67 to £13.60
Waste and Resource Management Industry	38.11	Collection of non-hazardous waste	47,000	£12.47	-1.6%	£8.72 to £18.52
	38.12	Collection of hazardous waste	*	*	*	*
	38.21	Treatment and disposal of non-hazardous waste	17,000	£12.35	-7.8%	£8.74 to £13.95
	38.22	Treatment and disposal of hazardous waste	*	*	*	*
All industries			26,019,000	£13.68	3.0%	£8.75 to £29.68

Source Annual Survey of Hours and Earnings 2020 Provisional (ONS 2020) Table 16.5a * data unavailable

Table 48 Hourly pay and paid hours worked averages for key occupations, 2020

	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	101,000	£17.41	-1.1%	37.5	17,000	£14.15	-0.9%	21.1
1255 Waste disposal and environmental services managers	*	£21.73	1.9%	37.2	*	*	*	*
5113 Gardeners and landscape gardeners	33,000	£10.60	0.1%	37.5	8,000	£9.19	1.7%	*
5114 Groundsmen and greenkeepers	35,000	£10.13	1.7%	39.0	*	£9.48	3.1%	*
6132 Pest control officers	*	£10.66	-10.3%	37.5	*	£10.58	*	19.5
6231 Housekeepers and related occupations	16,000	£9.89	7.7%	37.5	23,000	£9.19	4.5%	18.4
6232 Caretakers	46,000	£10.97	0.1%	37.0	96,000	£9.73	3.2%	15.9
6240 Cleaning and housekeeping managers and supervisors	25,000	£10.25	2.3%	37.8	21,000	£9.54	3.7%	19.5
8211 Large goods vehicle drivers	183,00	£11.79	-2.5%	44.4	14,000	£11.99	11.3%	22.0
9132 Industrial cleaning process occupations	12,000	£9.72	8.0%	39.0	*	£8.72	8.6%	15.7
9231 Window cleaning and hygiene operatives	*	£9.00	-9.9%	37.5	*	£8.72	2.6%	20.9
9232 Street cleaners	5,000	£10.50	1.0%	37.0	*	£8.78	-2.2%	15.6
9233 Cleaning and hygiene operatives and domestics	100,000	£9.31	4.1%	37.2	441,000	£9.00	5.0%	14.4
9235 Refuse and salvage occupations	18,000	£10.21	2.2%	37.0	*	£9.09	-3.9%	*
9236 Vehicle valeters and cleaners	7,000	£8.72	-0.6%	40.0	5,000	£8.21	0.0%	16.2
9239 Elementary cleaning occupations n.e.c.	*	£9.67	-6.4%	37.0	*	*	*	*
All occupations	18,441,000	£15.14	1.6%	37.5	7,577,000	£10.39	4.5%	18.4

Source Annual Survey of Hours and Earnings 2020 Provisional (ONS 2020) 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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