



association for public service excellence

State of the Market 2026

Local authority building cleaning services



**Briefing 26/06
February 2026**

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State of the Market 2026

Local authority cleaning services

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About APSE

The Association for Public Service Excellence (APSE) is a not-for-profit local government body working with over 300 councils throughout the UK.

Promoting excellence in public services, APSE is the foremost specialist in local authority frontline services and operates one of the UK's largest research programmes in local government policy and frontline service delivery matters.

Results at a glance

Management of the service	2026	2025
Offices and schools are the predominant buildings cleaned	100%	95.24%
Building cleaning as a standalone service	41.67%	52.38%
Sell services to academies	41.67%	42.86%

Budget and finance

The service budget will decrease or significantly decrease in the next year	41.66%	52.38%
The greatest increase in cost to the service is staffing costs	100%	85.00%
Passed on price rises to the client in full or in part	50.00%	70.00%

Staffing

Staff absence levels are perceived to be too high	42.11%	42.11%
Provide regular staff training	81.82%	81.25%

Environmental issues

Implemented a reduction in the number of chemicals used	83.33%	63.16%
Planning to implement a process to reduce water consumption	59.33%	55.56%

1. Local Authority Building Cleaning Services – State of the Market 2026

APSE conducted an online survey during December 2025 and January 2026, which was sent out to local authority building cleaning contacts throughout the UK. A series of questions were asked covering attitudes to the issues currently facing building cleaning, the operation of the cleaning service and challenges for the future. The majority of the questions have been surveyed since 2008, and trends are now apparent.

The data collected through these surveys is intended to provide a snapshot of the perception of local authority cleaning services. For detailed and verifiable comparison of both financial and performance data, authorities should consider joining [APSE Performance Networks](#) that covers building cleaning.

2. Results

Respondents were UK wide with 64.70% from England, 23.53% from Scotland, and 11.76% from Wales. The survey therefore reflects APSE's UK-wide membership and provides a national reflection of opinion.

3. Scope

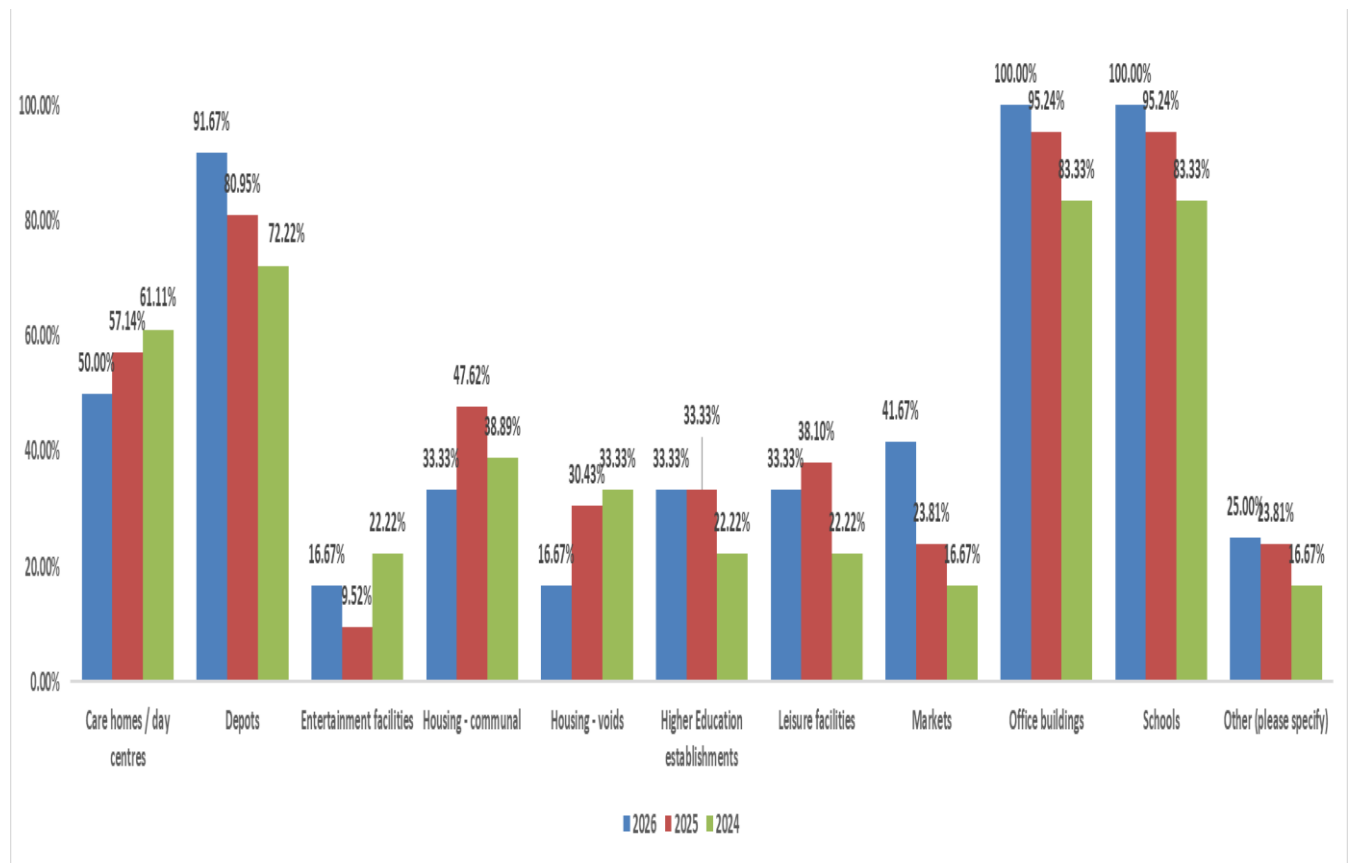
3.1 What buildings does your service currently clean?

The survey sought to establish what mix of buildings the service cleaned. The graph below provides an overview of the responses for 2026 and a comparison with the responses received to the 2025 and 2024 State of the Market surveys.

As the graph below demonstrates, office buildings and schools remain the most predominant of the types of building cleaned by the service with 100% of respondents stating this to be the case. When comparing the responses over the last three years, it is clear that there is an upward trend in the number of respondents reporting that they clean depots.

In 2026, the responses show that there has been an increase in the number of respondents reporting that they clean markets and entertainment facilities when compared with 2025.

This indicates that local authority building cleaning services are broadening the type of buildings that they clean and this could be in response to the need to diversify the portfolio to ensure the service remains sustainable going forward.

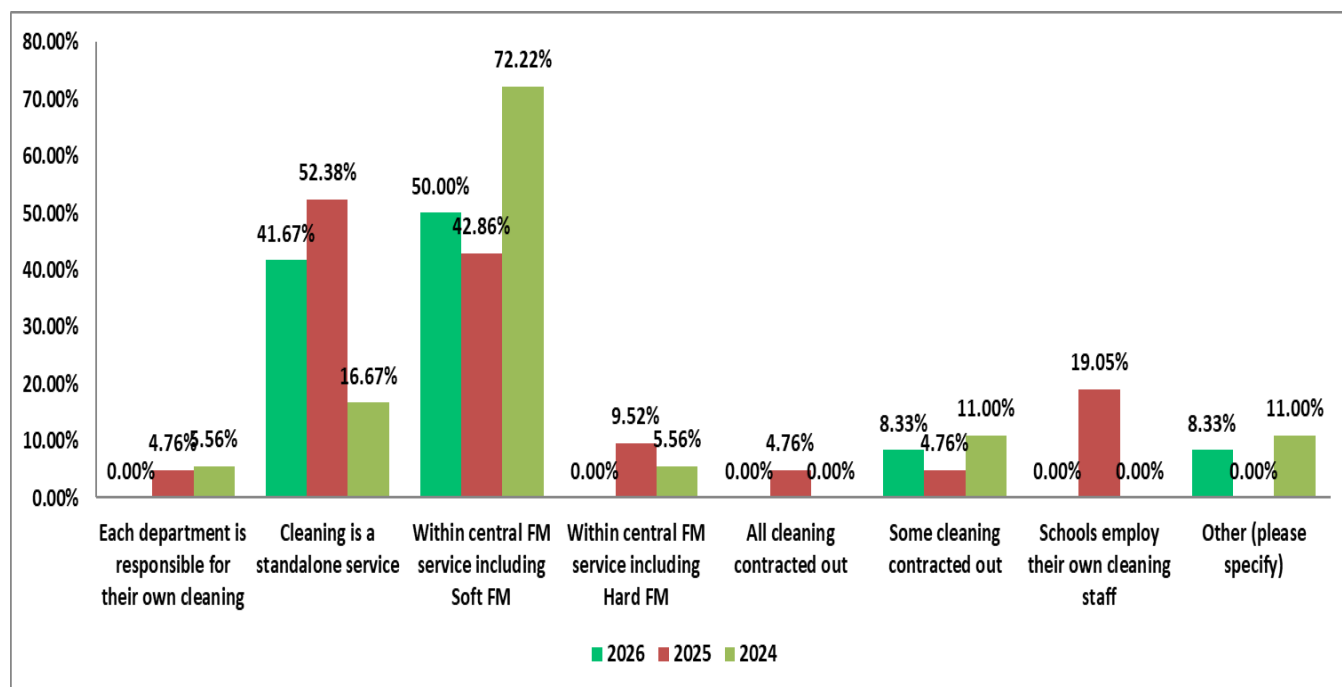


In addition to the buildings cleaned referred to in the graph above, for the 2026 survey respondents also confirmed that the service cleaned the following: -

- Libraries
- Further education establishments
- Public toilets
- Crematorium
- Parish council / community buildings

3.2 How are the cleaning services organised within your authority?

To gain an understanding of how the service is organised within the authority the respondents were asked to select from a range of options. The graph below provides an overview of the responses received.

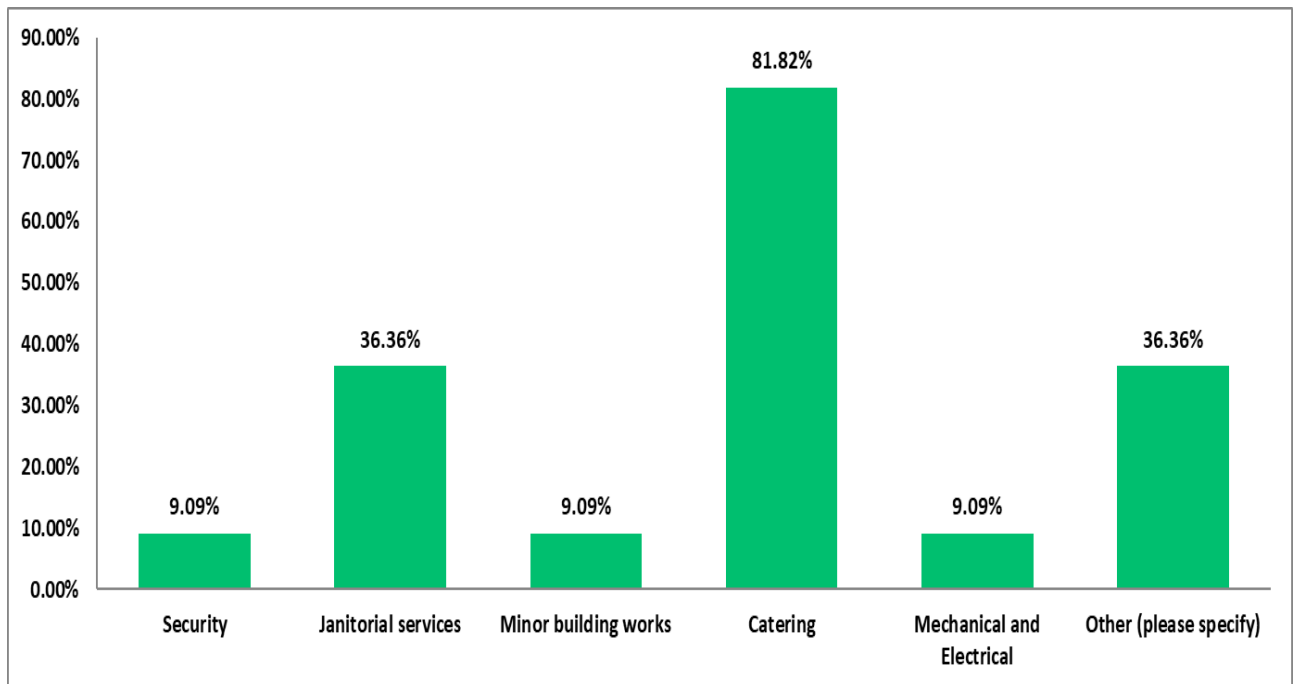


The largest portion of respondents, (50%) report that the cleaning service is within a central FM service including soft FM and 41.67% report that cleaning is a standalone service.

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

3.3 Which other services are you responsible for?

Respondents to the survey reported that in addition to building cleaning they also had responsibility for a range of other services. The following graph provides details of these services.



The greatest number of respondents, 81.82%, report that they are responsible for catering services and 36.36% of respondents advise that they have responsibility for janitorial services.

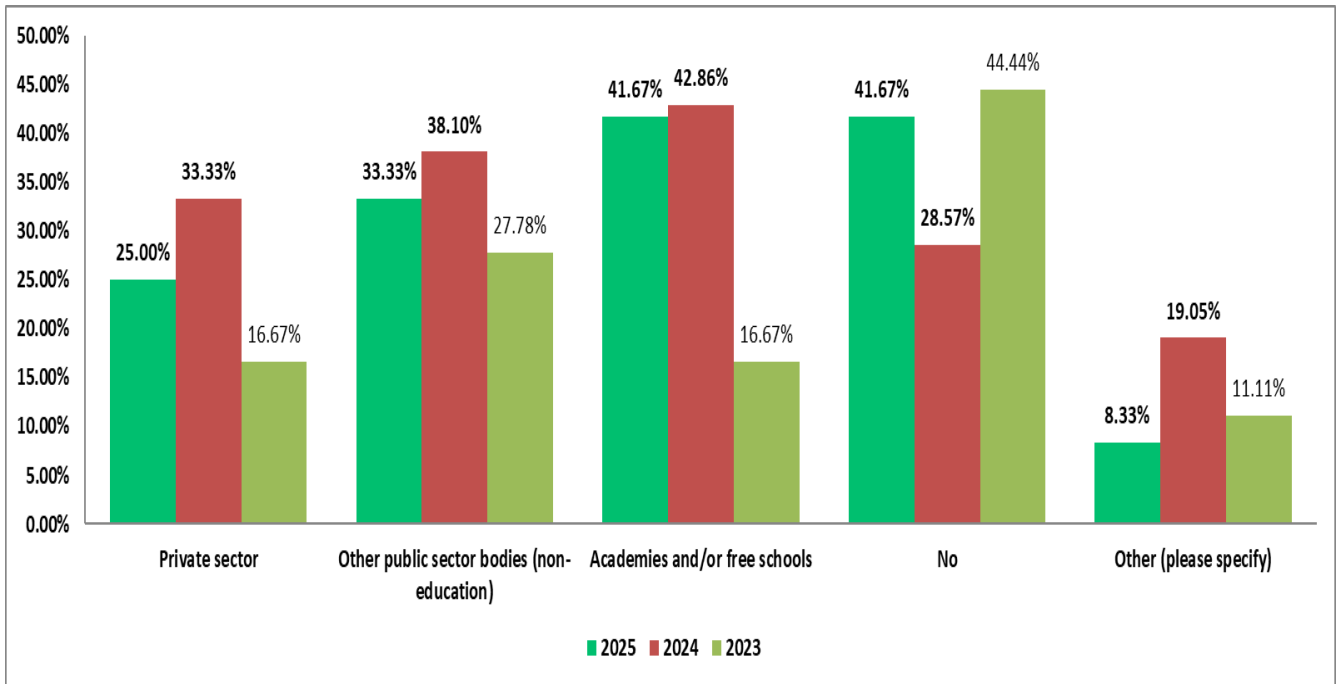
In addition to the list of services provided in the above graph, there was also a range of other services that respondents reported offering, and these include: -

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

The survey highlights that the role of a building cleaning manager is wide and varied and the remit encompasses a range of other facilities management responsibilities.

3.3 Do you sell your services outside of the Local Authority?

With the continued requirement to generate an income from the service, the State of the Market survey sought to understand if councils are selling services outside the local authority. The graph below details the responses received.



The highest percentage of respondents (41.67%) reported that they sell services outside the local authority to academies or free schools. However, the same number of respondents reported that they did not sell outside the local authority, which is an increase from the 28.57% that advised this to be the case in 2025.

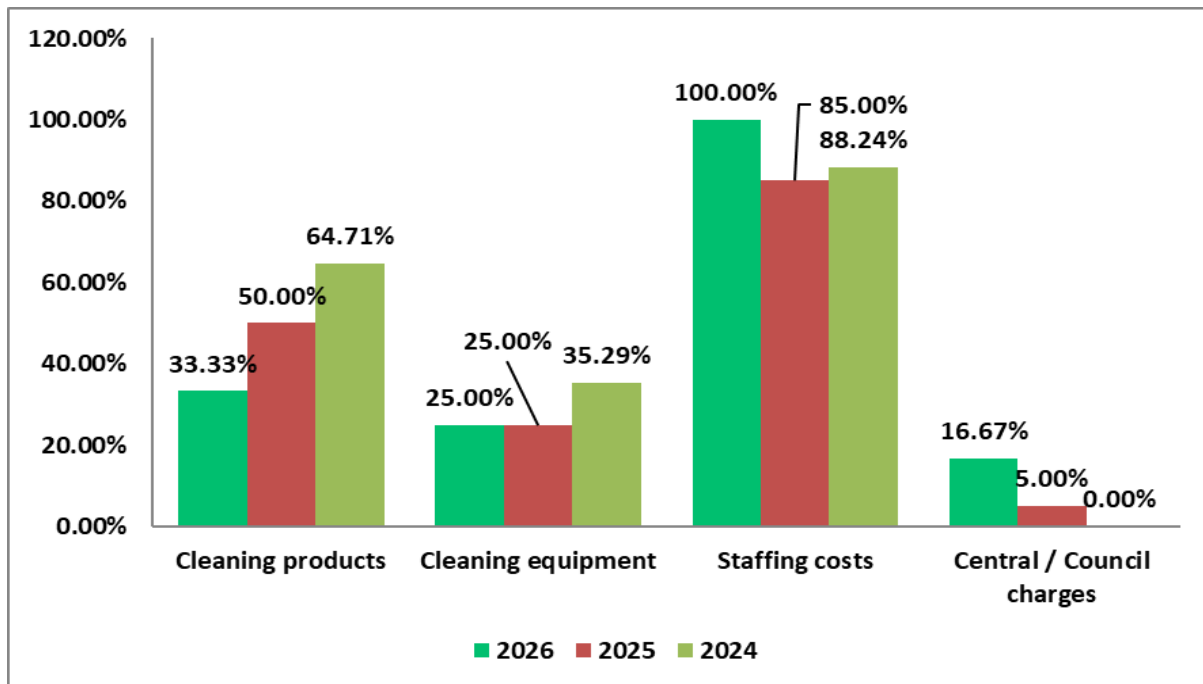
3.4 How do you expect the cleaning budget to change next year?

For the 2026 survey (33.33%), expect that the budget will increase or significantly increase in the next year. 41.66% of respondents said that they expected the budget to decrease or significantly decrease in the next year, and 25% believe that the budget would be the same.

The expectation that budgets will decrease over the next year is no surprise with the wider severe budget pressures that councils are experiencing. However, there has been an increase of 19.04% believing that budget will increase or significantly increase in the next year when compared with 2025, which could indicate that the stabilisation of costs and the increase in the number of councils reporting that the service sits in a larger FM service may be a reason for the more positive expectation.

3.5 What aspect of the cleaning service has seen the greatest price rise?

To gain an understanding of the pressures on the cleaning service, the State of the Market survey asked where the greatest price rises had been seen. The graph below provides an overview of the responses received for 2026, 2025 and 2024.



It is abundantly clear from the responses to the 2026 survey that staffing costs have seen the greatest increases with 100% of respondents reporting this to be the case.

The pressures on the budget from the increase in staffing costs in a service where the majority of the expenditure is on pay and conditions is highlighted as a concern not only in this question in the survey but also in discussions at the [APSE Building Cleaning and Facilities Management Network](#).

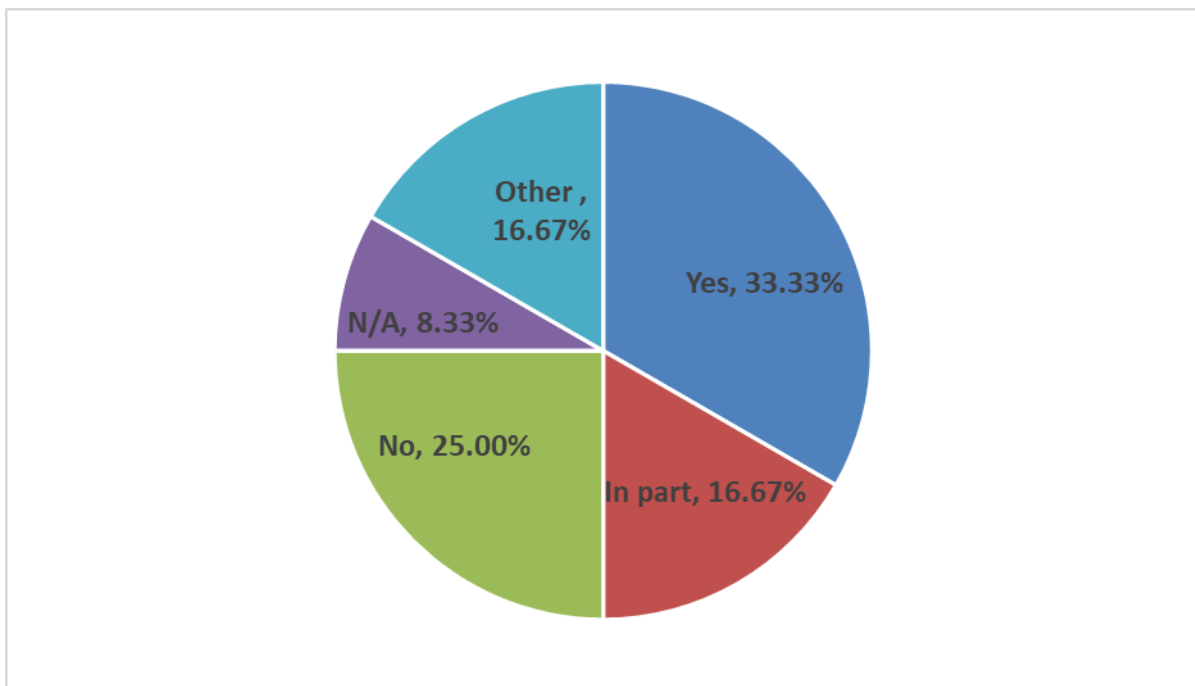
3.6 What has the service done to mitigate price rises.

In response to the price rises, over half (63.64%) of the respondents advised that the service had sourced alternative products / equipment, and 18.18% reported that they had changed suppliers, which are comparable with the responses in 2025, where 65.00% of respondents advised they had sourced alternative products / equipment and 20% of respondents confirmed that they had changed suppliers.

36.36% of respondents reported that they had reduced staff hours or changed cleaning specifications. Due to the competition in the cleaning sector, there is limited opportunity to pass on the rising costs to clients. Therefore, it is no surprise that service managers must find savings in the service.

3.7 Has the service passed on the price rise to the customers?

The chart below provides an overview of the responses to this question: -



The responses to this question demonstrate that despite councils taking action to mitigate the increase in the cost of cleaning products and cleaning equipment, the price rises have been too high to mitigate. Therefore, they are passing on to the increases onto the customer with 33.33% of respondents reporting that they had passed on the cost of the price rise and a further 16.67% commented that part of the rise in cost had been passed on.

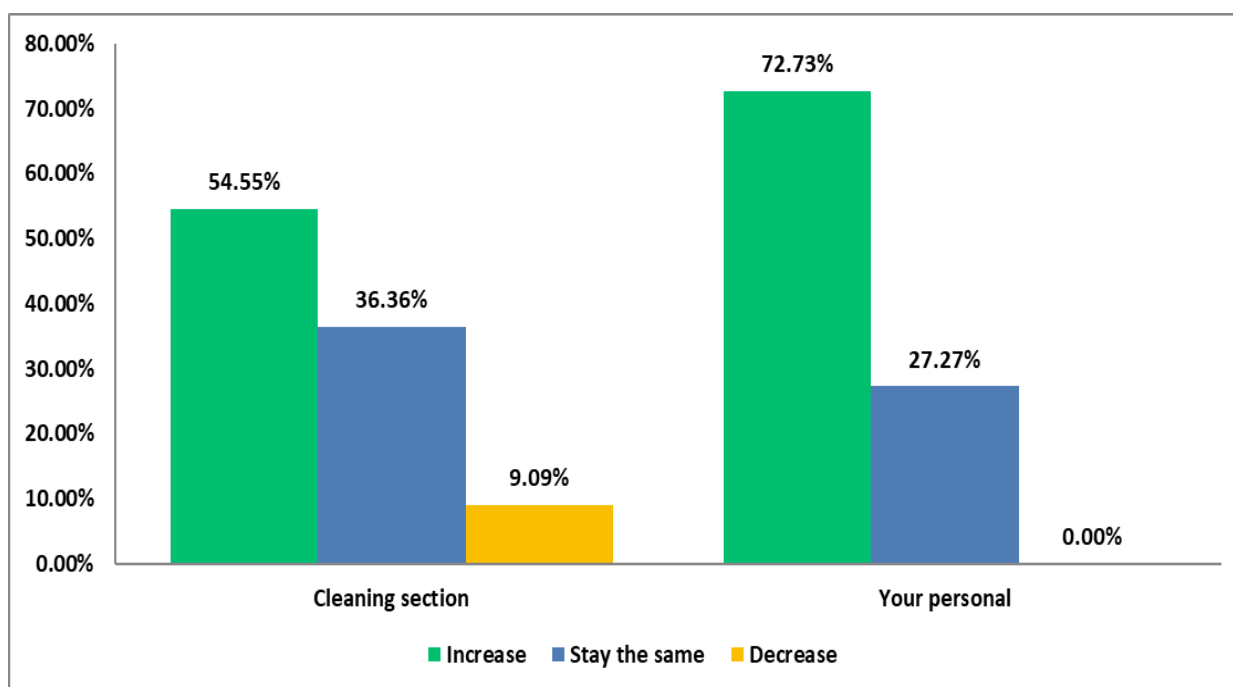
However, 25% advise that they have not passed on price rises to customers. In the comments associated with this question, it is reported that when a Service Level Agreement is in place they have been able to increase prices, but it has not been the case for internal work.

4. Staffing and workload

4.1 How do you expect the workload to change over the next 12 months?

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

The graph below highlights the responses.



Just over half of respondents (54.55%) anticipated that the workload of the cleaning service, 36.36% believed that it would stay the same and 9.09% expected it to decrease.

In terms of personal workload, a majority of respondents, 72.73% stated that they thought it would increase, and 27.27% thought it would stay the same.

The reason for over 72.73% of respondents believing that their personal workload would increase could be attributed to the severe pressure on council budgets resulting in a reduction in the number of managers within the service resulting in increased workload.

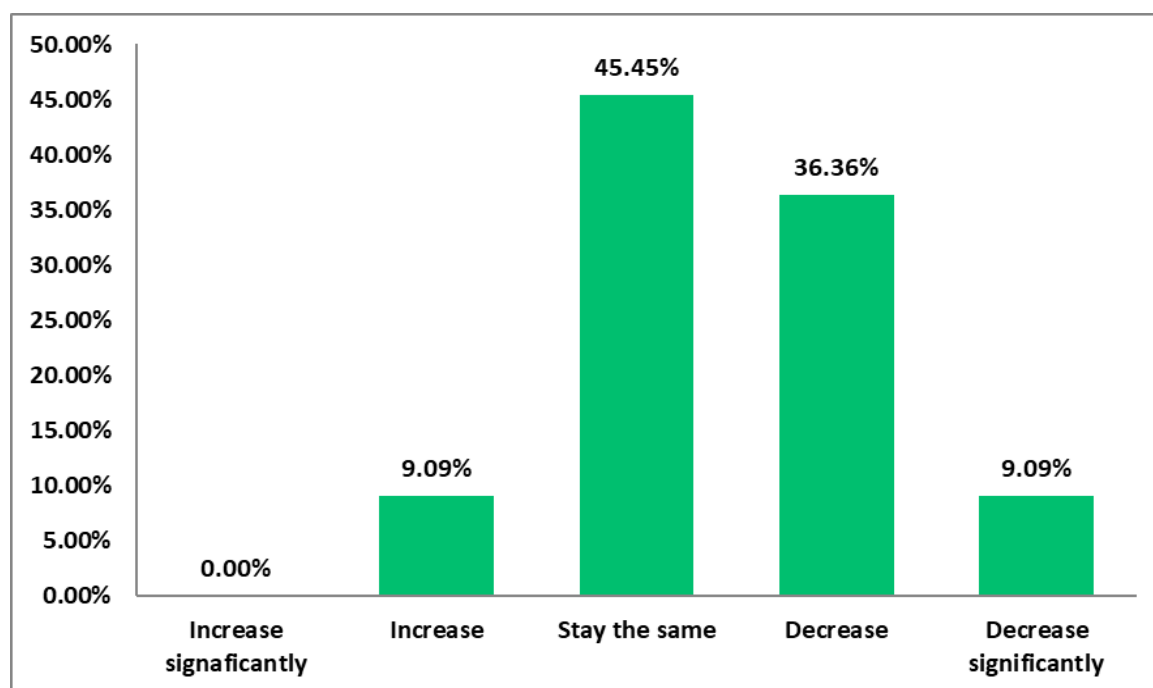
4.2 Which of the following applies to your staff training?

As previously stated, the majority of expenditure for the cleaning service is attributed to the workforce. Therefore, the survey sought to understand what staff training local authorities were providing for the cleaning service. 54.55% of respondents reported that they held regular appraisals, 81.82% provided regular staff training and 27.27% circulated a regular cleaning section newsletter. A further 9.09% of respondents report that the organisation holds an Investors in People accreditation.

The responses to this question demonstrate that despite the challenges of providing training to staff that often work low hours, and off site, there is provision in place to ensure that they receive training, and this is a recognition that staff training is not only important to ensure regulatory compliance but as an investment in the workforce. APSE Training provides a range of courses to support local authorities to deliver their services, including contact management, managing Service Level Agreements and customer service skills for the frontline, for further information, please [click here](#) or contact Helen Reed on hreed@apse.org.uk

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

The survey asked what the expectation was for staffing levels over the next year, and the graph below provides an overview of the responses received.

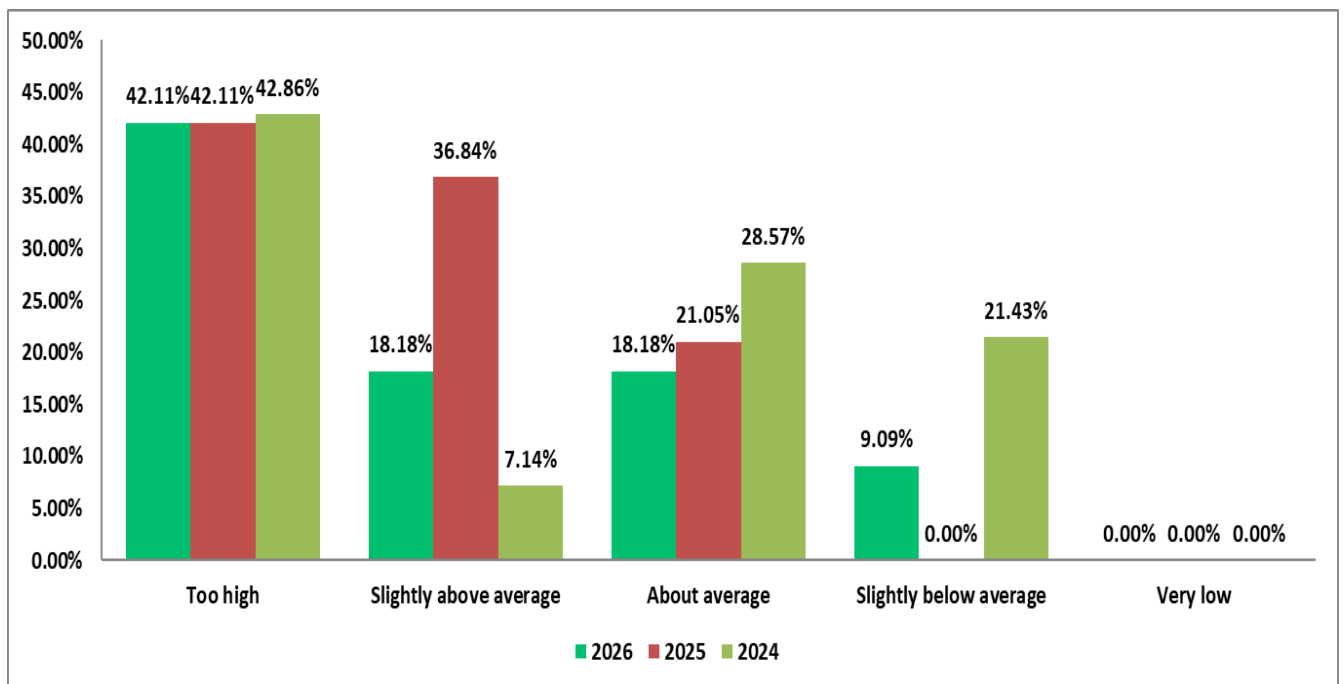


16.67% of the respondents predicted that staffing levels would increase or significantly increase in the next 12 months which is a decrease from 7.58% of respondents believing this in 2025, 45.45% believed that staffing levels would stay the same compared with 55.56% in 2025 and there has been an increase from just under a third of respondents in 2025 anticipating that staffing levels would decrease or significantly decrease compared with the 45.45% of respondents believing this to be the case in 2026.

This change in the respondents' expectations could be attributed to the rising staffing costs.

4.4 Attitudes to absence

The State of the Market survey sought to gain an understanding of the respondents' attitudes to absence. Below is a comparison with the responses received in 2026, 2025 and the 2024 State of the Market Surveys.

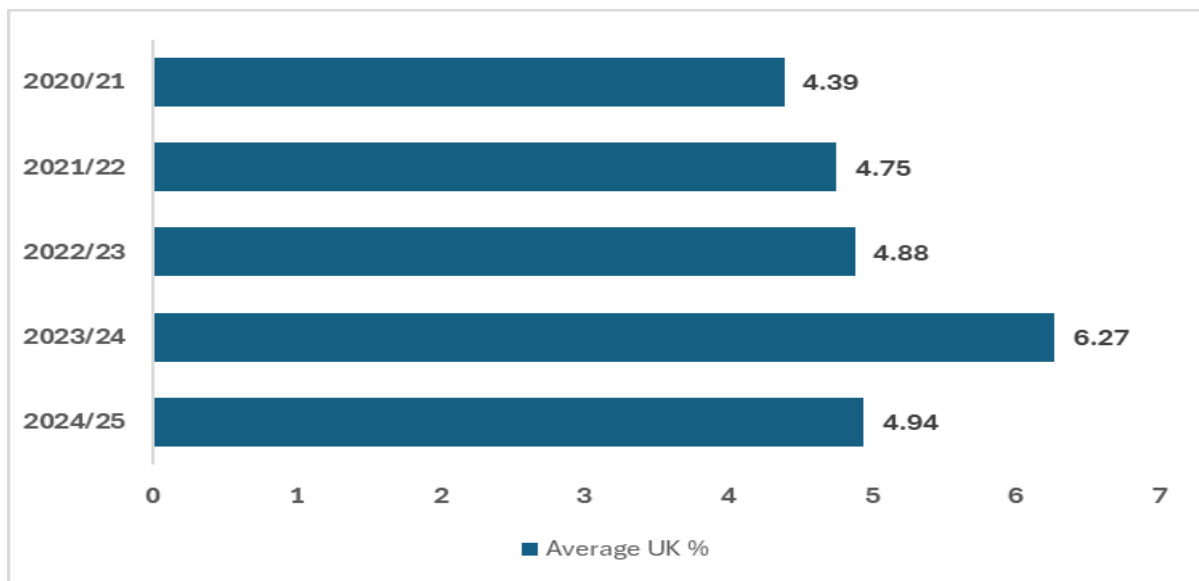


For 2026, the largest number of respondents (42.11%), perceive that staff absence is too high which is very consistent with the response in 2025, and 18.18% report that they believe that staff absence was slightly above average.

9.09% of respondents felt that the staff absence was slightly below average.

The responses to this question demonstrate that the perception regarding staff absence has seen a slight improvement when compared with the last two years. However, the data clearly shows that staff absence continues to be a challenge for the service.

The table below outlines UK staff absence for frontline staff captured in the [APSE Performance Networks](#) data.

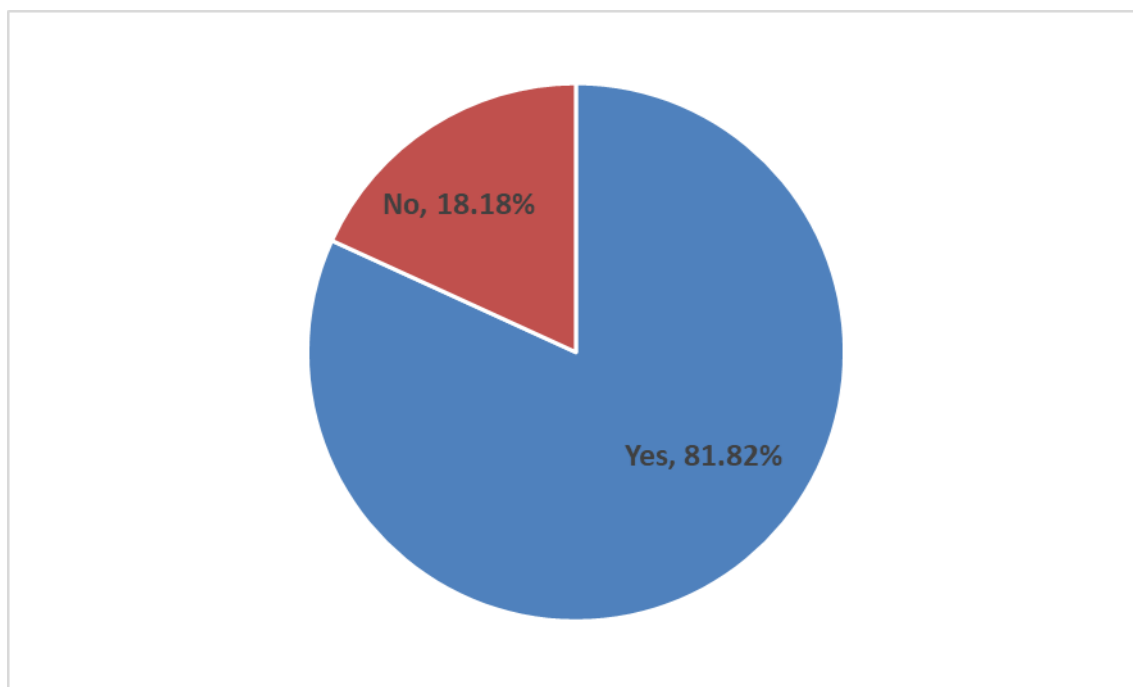


The data demonstrates that the average staff absence has been consistent over the last five years, with the highest level reported as being 6.27% in 2023/24. Despite the average absence being consistent there has been an increase in the number of respondents perceiving that staff absence is above average. This could be attributed to the pressures on the service making any absence more keenly felt and more difficult to cover.

At the [APSE building cleaning and facilities management network](#) it has been reported that there has been an increase in stress-related staff absences which could be in part related to the impact of the cost-of-living crisis, and the service being required to deliver for the client with less resources due to budget pressures.

4.5 Do you pay the higher Living Wage Foundation Living Wage?

The chart below provides an overview of the responses received.



In response to this question, 81.82% report that they paid the higher Living Wage Foundation Living Wage and 18.18% report that they did not, which is a significant improvement to the findings from the 2025 survey where only 63.16% advised that they paid the higher living wage.

For the purposes of comparison, the survey asked what the basic hourly rate was for cleaning staff. In 2024, respondents reported that the lowest rate was between £10.50 - £11.00 and the highest basic rate was £12.50 - £13.00.

For 2025, 31.25% of respondents reported that the lowest rate was between £12.00 - £12.50 and the highest rate was over £13.00

And for 2026, 9.09% of respondents reported that the lowest rate was between £11.00 - £11.50, and the highest rate was reported at over £13.00 with 45.45% advising this to be the case which is a significant increase from 2025 with only 11.11% stated that the highest rate was above £13.00.

With the cleaning workforce being made up predominantly of women working part-time hours, the increase in pay is not only welcome but may also be considered as a

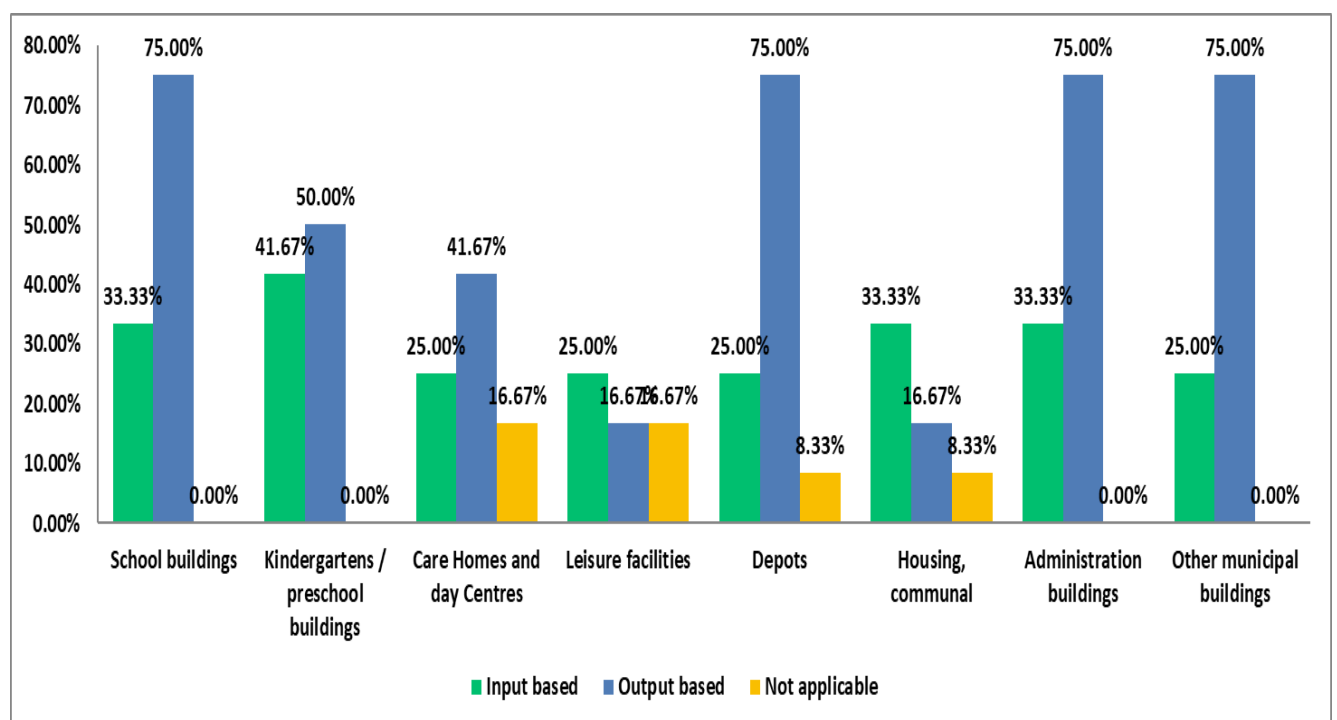
necessary means to retain the workforce. Moreover, the higher wages not only support employees with the cost-of-living crisis but also have benefits for the local economy. However, with costs rising across the service, the additional costs relating to pay are putting extra pressure on the service. The wage increases are in effect unfunded in terms of the local government financial settlement figures, resulting in savings needing to be found from other aspects of the service, for the costs to be passed onto the client or more commercial work to be undertaken.

5 Cleaning methodology, standards, and sustainability

5.1 What type of cleaning specification do you work to in the following buildings?

The survey sought to gain an understanding of the methodology and the type of specification that the cleaning service applied in a specific building type.

The graph below provides an overview of the range of responses received.



The responses received show that the predominant specification is output based with 75.00% reporting this specification for school buildings, depots, administration buildings and other municipal buildings.

5.2 Which of the following cleaning standards / quality measures does your authority use?

To gain a picture of the cleaning standards that the service works to it was asked which of the specified standards the council used to measure quality. Many respondents, 58.33%, advised they used an internally agreed standard, a further 33.33% reported that BICS standards were used with all their cleaning work and 16.67% have an alternative cleaning standard in place. For respondents that have specified 'other' to this question they have commented that the service works to cleaning standards that are agreed with the customer.

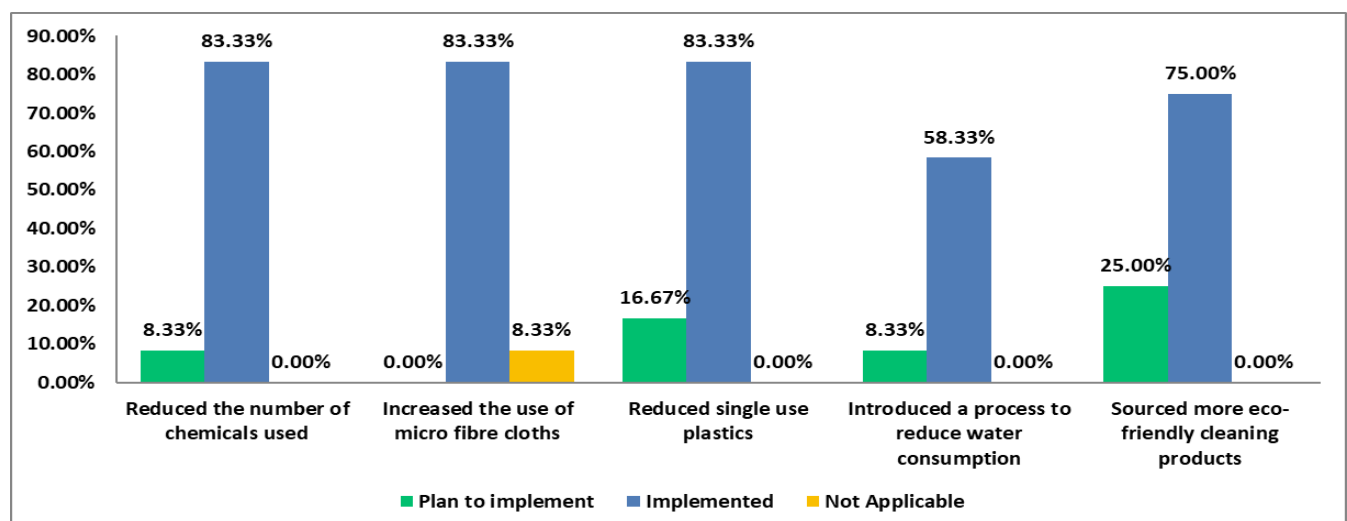
Building Cleaning Inspection App – An increasing number of councils are utilising the APSE Building Cleaning Inspection App with 8.33% of respondents advising that they use the app. APSE Performance Networks developed the app to support councils when carrying out building cleaning inspections and audits. Further information regarding the app can be obtained via the link below: -

[Cleaning audit management system](#)

Or, information can be obtained by contacting APSE Performance Networks Team, directly on: - performance.networks@apse.org.uk

5.3 What measures have you put in place to make the service more sustainable?

With the increased focus on sustainability, the survey asked respondents to report on the measures that they have put in place or were considering implementing to make their service more sustainable. The graph below provides an outline of the responses received.



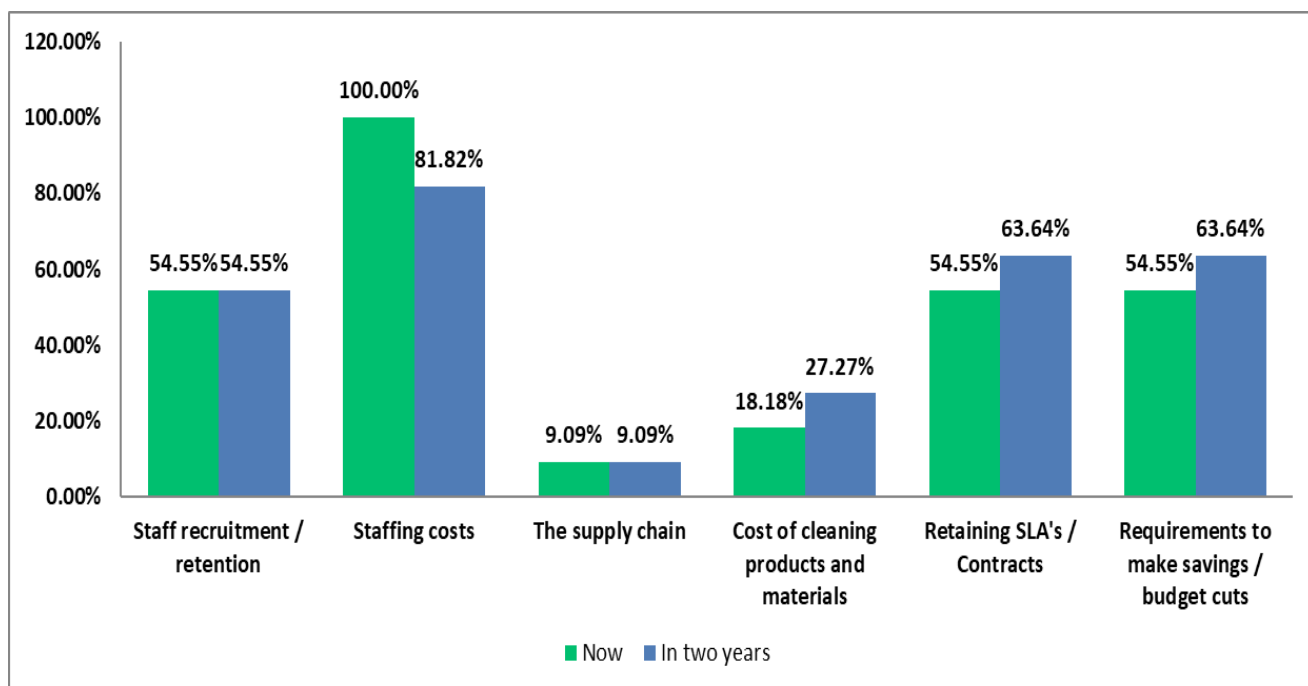
The responses show that local authorities are now implementing measures to make the service more sustainable. When making a comparison with previous years, there has been significant increase in the number of respondents reporting that they have implemented the measures highlighted in the graph.

Sustainability took a back seat as the cleaning service grappled with the challenges of the pandemic. However, it is positive to see from the data that over the past three years there has been a renewed focus and several measures to improve sustainability.

6. Comments on the future

6.1 What are the greatest challenges facing the service?

The survey sought to gain a snapshot of the perceptions of the future challenges for the service now and in the next two years. The graph below provides an overview of these perceptions.

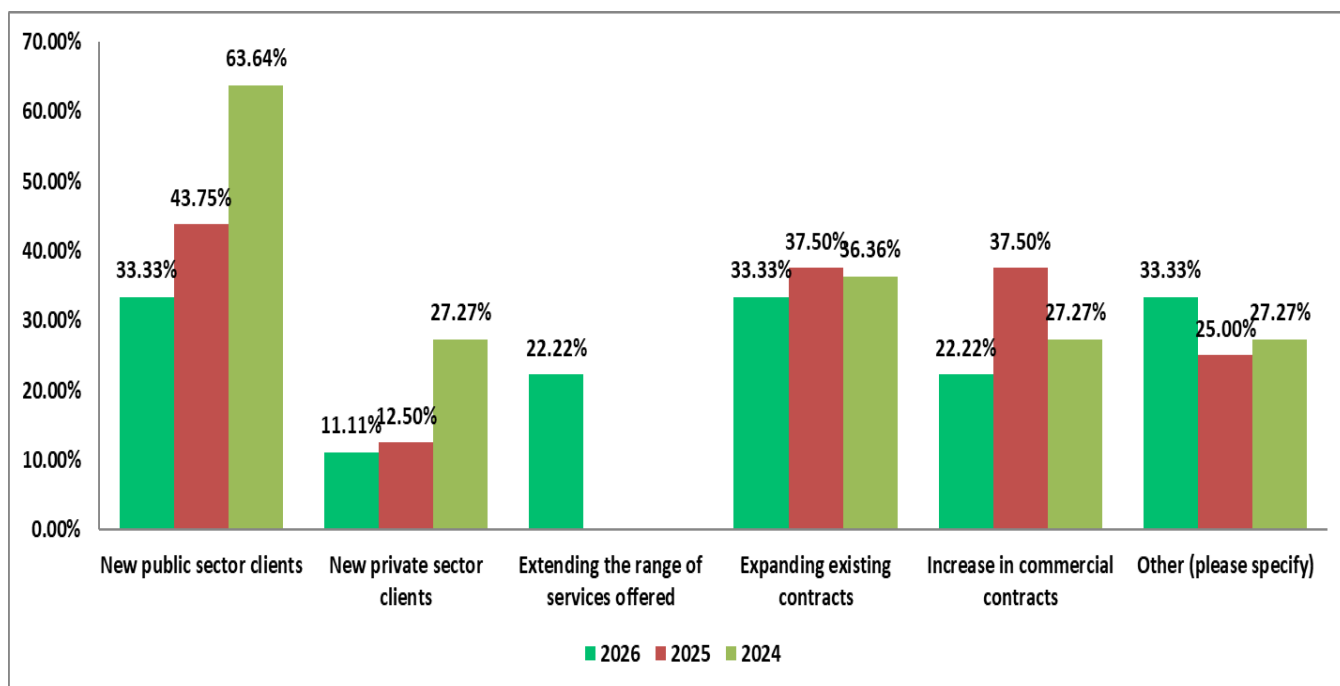


It is abundantly clear from the responses to this question and the responses to other questions in the survey that staffing costs are stated as one of the greatest challenges with all respondents reporting this to be the case. Just over half 54.55% of the respondents reported that staff recruitment/retention is a challenge currently and will continue to be in two years' time. Staff recruitment and retention have been challenging for the service for several years but has now been exacerbated due to

the ageing workforce, competition in the jobs market with sectors such as hospitality and supermarkets and the increase in demand for the service

6.2 Where do you see growth for the service over the next 12 months?

The graph below provides an overview of the perceived growth areas in the next 12 months and a comparison with perceptions in 2026, 2025 and 2024.



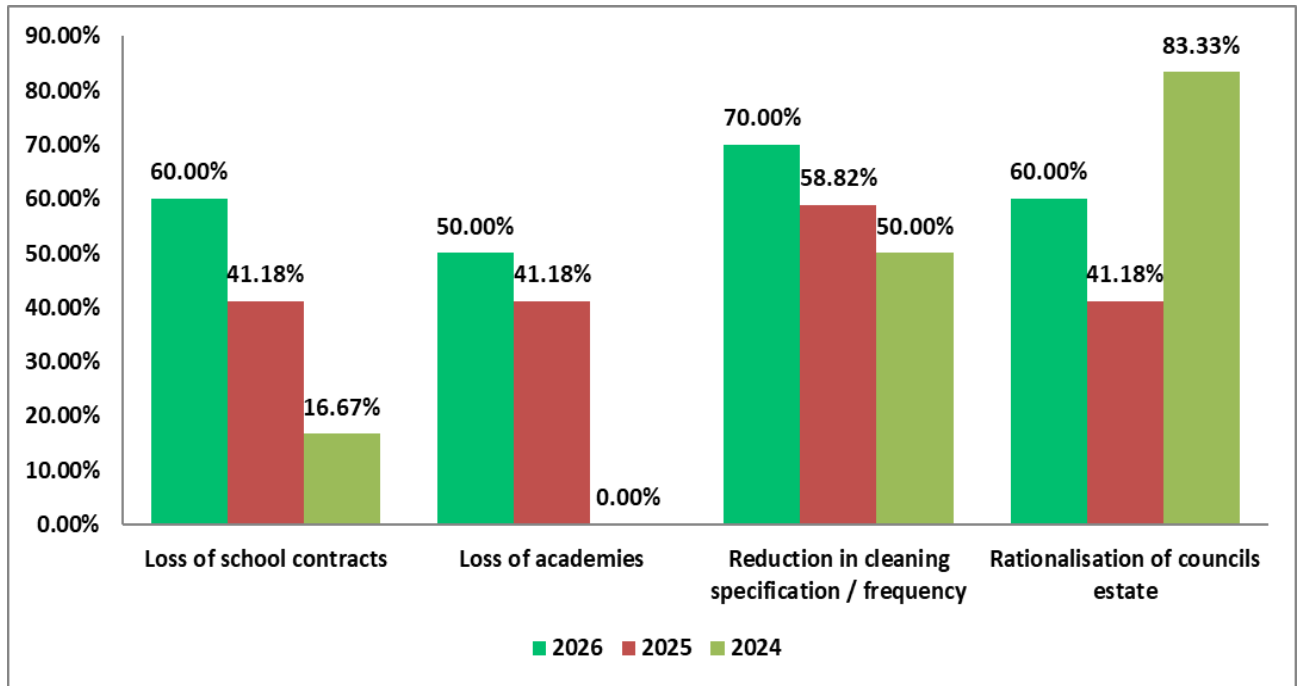
Over the past few years, local authorities have demonstrated that they have the ability and expertise to respond flexibly, maintain high standards and service continuity in unprecedented times.

There has been a decrease from 63.64% of respondents reporting in 2024 that they saw growth in new public contracts to 33.33% this year. The number of respondents believing that they saw growth in expanding existing contracts has remained consistent over the last three years. A further decrease, to a three-year low of 11.11% of respondents anticipate that the growth will come from new private sector clients

The comments associated with this question highlight the difficulties facing the service, as the majority of 33.33% of respondents reporting other state that they do not see any areas of growth.

6.3 Where do you see future decreases in work for the service?

Future decreases that respondents predict for the service over the next 12 months are detailed in the graph below, and a comparison with where councils predicted a decrease in work in 2025 and 2024.



The reported future decreases for 2026 show that there is a perception that there will be a reduction in cleaning specifications or frequency with 70% of respondents believing this to be the case, which is an increase of 20% from the respondents believing this in 2024

There has been an increase from 41.18% of respondents believing that there would be a rationalisation of the council estates. The reason for a greater number of respondents believing this to be case are not captured in the survey, but this could be attributed to Local Government Reorganisation being on the horizon for local authorities in England, which will require councils to review their assets, and the building cleaning and FM services will need to adapt accordingly.

APSE Comment

Whilst often regarded as a high-cost item to schools and public buildings' budgets, the value of hygiene cleaning is of utmost importance for helping to prevent the spread of infectious matter. Therefore, the need for cleaning as an infection control measure is still very much a focus. However, this recognition does not alleviate the challenges faced within the sector.

The potential further rationalisation of the public sector estate due to Local Government Reorganisation in England could decrease the service coverage and create issues of loss of economies of scale. To support local authorities through the process of reorganisation, APSE has developed a range of services and tools, for further information, please [click here](#). It should however also be noted that local government reorganisation may deliver the opportunity for those councils who retain an in-house service to develop a business model to insource services as councils merge. It may be possible to realise some economies of scale and at the same time provide capacity to run operational services, recognising that many councils have been hollowed out of capacity to run services directly due to decades of outsourced contracts.

At the other end of the spectrum the issue of pay and rewards again creates concerns as the sector competes with retail and hospitality jobs, in a market saturated with vacancies, exacerbating recruitment issues.

Pay is a concern with the NJC pay rise settlements over the last three years, significantly above previously levels, which whilst welcome as a corrective measure to endemic low pay, this nevertheless leaves the sector within the sphere of low pay and condenses the differences between public sector pay, and lower paid work, within the wider economy. Whilst the national living wage increases are welcome alongside the payment of the real living wage in reality the sector is still a relatively low-paid sector and is now competing to fill vacancies within a marketplace where the pay differences have all but disappeared. Where building cleaning and FM services are effectively treated as traded services, whilst many welcome the long-over-due pay increases, through the NJC and national minimum wage, it nevertheless adds a further pressure on service budgets.

Future apprenticeships, career pathways and the wider benefits of local government as an employer in terms of paid leave, access to a pension, and training and so forth will all need to be a focus of future recruitment and retention strategies.

On a final point, it is clear that the current climate that local authority building cleaning and FM services are operating in is very challenging and to ensure that the services are fit for purpose and sustainable for the future, a clear strategy and strong leadership are required. [APSE Synergy trading as APSE Solutions](#) can provide a range of services such as service reviews, strategic development and business case support alongside interim managers to support local authorities to meet the challenges. For future details contact Emma Taylor on etaylor@apse.org.uk or for interim management Lucia Gervis on lgervis@apse.org.uk

Vickie Hacking,
APSE Principal Advisor

Sign up for APSE membership to enjoy a whole range of benefits.

APSE member authorities have access to a range of membership resources to assist in delivering council services. This includes our regular network, specifically designed to bring together elected members, directors, managers, and heads of service, together with trade union representatives, to discuss service specific issues, innovation, and new ways of delivering continuous improvement. The networks are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

APSE Networks are a free service included as part of your authority's membership of APSE and all end with an informal lunch to facilitate networking with peers in other councils. If you do not currently receive details about APSE network meetings and would like to be added to our list of contacts for your service area, please email **enquiries@apse.org.uk**.

Our national networks groups include: -

- Building cleaning and FM
- Catering
- Cemeteries and crematoria
- Local Government Reorganisation
- Veterans and Military Champions Network
- Social Value, Procurement and Commercialisation
- Housing, construction and building maintenance.
- Parks, horticultural and ground maintenance
- Renewables and climate change
- Roads, highways, and street lighting
- Sports and leisure management
- Vehicle maintenance and transport
- Waste management, refuse collection and street cleansing.

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