

APSE Solutions



Why the race to the 'bottom' has to end.

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Why the race to the 'bottom' has to end.



- Current trends identified in:
 - Workforce
 - Office Environment
 - Health & Safety
 - Technology
 - The 'High Street'
- What are their effects?
- Different strategy required.

Workforce Trends in cleaning



- Migrant labour;
 - British Cleaning Council say 23% of the UK cleaning workforce is Non-UK Nationals.
 - In London it is 68%.
- Ageing workforce;
 - Warwick University say 22% of cleaning staff in England are 55 years and over.
 - U.S. Bureau of Labour Statistics say nearly a third of their cleaners are 55 years and over.
- Vacancies;
 - British Cleaning Council identifies sector vacancies as a percentage of employment at 4.1% and 33% of vacancies considered hard to fill.



Office Environment Trends



- Office Space is changing;
 - Open spaces, Shared Spaces, Hot Desking, and Surface Cleaning.
- In the U.S.A.
 - 75% of companies use 7 types of collaborative spaces. [Knoll Inc., 'Creating Collaborative Spaces That Work']
 - “Office Space Per Worker Is Falling.” [Core Net Global]
 - Restroom traffic could increase by 30%. [Georgia Pacific: Cleaning High Density Workspaces]



Infection Risk



- In a practical experiment carried out in the U.S.A. by CleanLink webcast, one door had a 'mock' virus on it. Four hours later;
 - 52% of employees had the virus on their hands.
 - 56% of surfaces were contaminated.
- 81% of office workers say hand sanitizer is one of the top two workplace amenities. [GOJO: Impact of a Comprehensive Workplace Hand Hygiene Program]
- The London Borough of Merton Schools & Families premises say they have eliminated Norovirus outbreaks since winter 08/09; having changed their cleaning contractor following debilitating outbreaks two consecutive winters.
 - The new contractor made substantial improvements to the cleaning methodologies used.

[https://issuu.com/quartzmetals/docs/c_m_april_2017/10]

Health & Safety



- Slips, Trips and Falls: Not just spills and wet floors but cleaning effectiveness; removal of contamination and preventing residue build up.

[Rob Shaw HSE. Cleaning Show Seminar 2017.]

- Research has shown an association between exposure to cleaning chemical vapour and respiratory symptoms. Further research is to be completed by the HSE.

[Dr Amy Gyte HSE. Cleaning Show Seminar 2017.]

Technology Trends



- Floor Cleaning is the fastest and largest growing robot category. [Dan Weltin, Sanitary Maintenance & Contracting Profits]
- Smaller machines, Battery capability, Cleaning systems.
- IoT (the Internet of Things)
 - Dispensers that send 'alerts' when they need re-filling, a washroom has had its' 500th visitor or hotels with live room cleaning status up-dates.
 - Contract, time management / payroll and scheduling software, complete with customer 'dash board'.
 - One contractor has a counter of verified cleaning hours completed that day on their website.

The High Street



“House of Fraser and Marks & Spencer are expected to shed dozens of stores in the coming months...”

[The Times:UK high street braced for more store closures. Nic Fildes 20th May 2018]

Not forgetting, Debenhams and Mothercare.



What are the effects?



- Workforce
 - Risk of a reducing labour pool, competition for staff, increasing costs, requirement for better working environment / equipment.
- Office Environment
 - Increased cleaning time due to variety of areas, increased soiling and more surface cleaning. Less margin for error.
- Health & Safety
 - Increased use of scrubber dryers and microfiber cleaning.
- Technology
 - Increased requirement to invest in new technology to keep up with clients expectations and competitors' offerings.
- The 'High Street'
 - Increased competition is likely as competitors' look to replace lost revenue.

Contractor Comment



Vince Treadgold, FM MD at Servest, told (CHTIMG_Feb 16) that the cleaning sector is missing a trick. "The technology is there." He says. "Some of the things that would be revolutionary in the cleaning sector are just everyday in other spheres. I mean, microfibre cloths have been around for ten years, but people still talk about them as if they're cutting edge." However there are signs that things might be beginning to change course. Treadgold attributes this to the impact of the Living Wage, at least in part. [http://chtmag.com/robo-clean/]



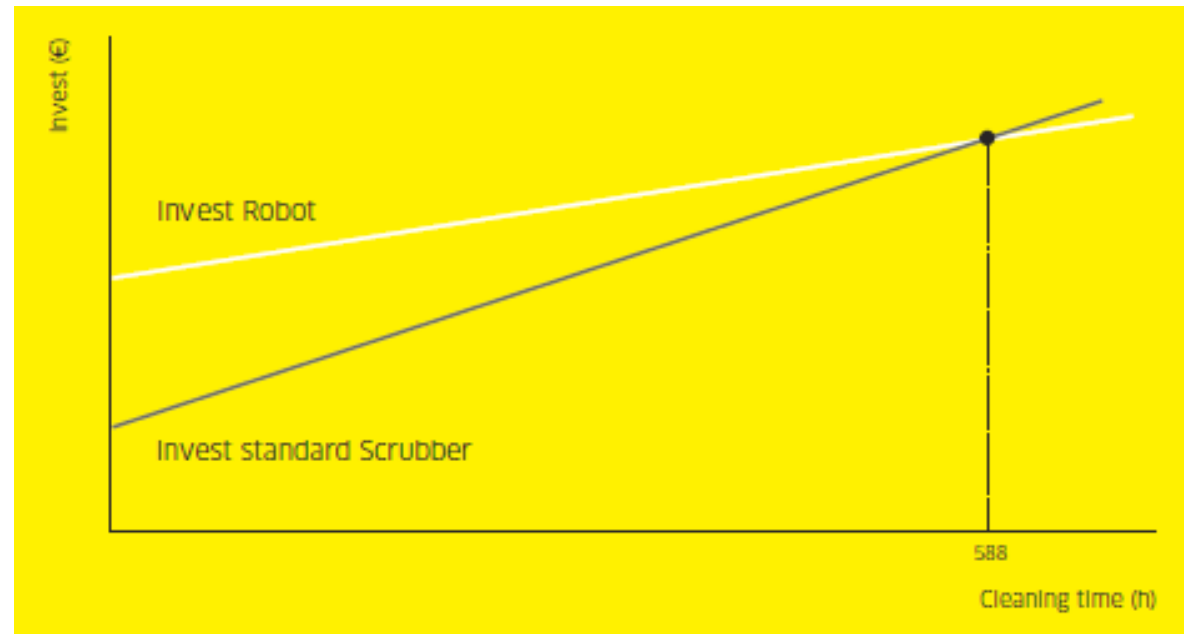
Robotic Mopping



Interclean Amsterdam, the world's leading tradeshow for cleaning professionals, winner of the Amsterdam Innovation Award 2018 (out of a total of 89 entries) was the KIRA B50 from Kärcher.

But it did not win because it was a robotic Scrubber-dryer.

[<https://www.intercleanshow.com/news/article/s/karcher-wins-the-amsterdam-innovation-award-2018>]



A Different Strategy



- Compete on Differentiation.
 - Local Authority Service provider:- Reliability and using you supports the local economy.
- Compete on Service.
 - Reliability and Responsiveness; Is daytime cleaning an option?
 - Facilities Management; Range of Services: Waste, Grounds. Payroll, IT, Fleet.
 - IoT; multi-site customers like to be able to look at a performance dash board.
- Compete on Quality.
 - Hygiene: - Thorough cleaning and hygiene testing.
 - Floor slip resistance: - Thorough cleaning and slip resistance testing.
 - New technology:- Microfiber, Cleaning Systems, Compact Scrubber Dryers, Cordless Vacuums.
- Compete on Social Responsibility.
 - Environmental impact: - Less chemicals, less water, launder-able mops / cloths.
 - Staff Welfare: - **Living Wage, Pension, employment conditions, H & S.**

A Different Strategy Comment



- The FMJ quotes James Taylor from MTW Research as commenting on their research report;

“Cleaning companies will need to increase productivity and differentiate through better staff management, more efficient equipment, enhanced levels of monitoring and communication, Internet of Things (IoT) automation and integration of new technologies if they are to succeed.”

[<http://www.fmj.co.uk/contract-cleaning-market-100m-growth-2016/>]



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