



2022 Report On The Building Service Contractor Market

Results of a Joint Study Conducted By *Contracting Profits* Magazine and BSCAI

April 2022

Contracting**Profits**



Introduction & Methodology

OBJECTIVE:

This survey was designed to target the purchasing habits and market growth of building service contractors (BSCs) nationwide in 2022.

SAMPLE:

The survey sample was selected from subscribers of *Contracting Profits* magazine (Building service contractors/professional cleaning contractor executives) and Building Service Contractors Association International database – with valid e-mail addresses collected from *Contracting Profits* magazine and BSCAI. Only BSC/Professional Cleaning Contractors were selected.

METHOD:

Recipients were sent an e-mail asking them to participate in this study. The email included a URL linked to the online questionnaire.

DATA COLLECTED:

February 24, 2022 through March 10, 2022.

NUMBER OF RESPONDENTS:

242 participants

MARGIN OF ERROR:

±6.26 percent at the 95 percent confidence level

About Us

CONTRACTING PROFITS:

Contracting Profits the official publication of the BSCAI, reaches more than 19,000 building service contractors. The magazine provides a variety of solutions for business challenges like legislative updates, technology, and infection control, as well as reporting on the latest cleaning trends. This content and much more are also featured on its website CleanLink.com.

BSCAI:

The Building Service Contractors Association International (BSCAI) represents a worldwide network of more than 1,000 member companies from across the United States and 15 countries worldwide that provide cleaning, facility maintenance, security, landscaping and other related services to building owners and managers.



2022 Report On The Building Service Contractor Market

By James DeGraff Associate Editor

EVERY YEAR, *Contracting Profits* and Building Service Contractors Association International (BSCAI) reach out to building service contractors across the United States to analyze employment trends, market share, service offerings and the overall outlook of their business. These results are available in the "2022 Report On The Building Service Contractor Market."

The past 12 months have been anything but predictable for the commercial cleaning industry. The distribution of vaccines in 2021 paved the way for a quasi-return to normalcy in many regards, followed by a brutal winter defined by the Omicron variant, and then a subsequent simmering down of case rates. The rollercoaster of shifting mandates and recommendations lead to reshuffled reopening plans or event scheduling on a dime.

In spite of this, many BSCs persevered when it came to sales. Seventy-two percent of respondents indicated higher sales in 2021, closer to the benchmark of 76 percent during a more conventional 2019. In 2020, that figure was just 53 percent.

In line with sales trends, profits for many of these BSCs showed positive growth as well. Compared to just 57 percent of respondents indicating increased profits in 2020 over 2019, 70 percent of BSCs in this year's study indicated higher profits from 2020 to 2021.

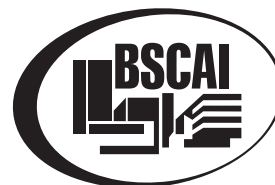
One sector that has shown impressive growth over the past year includes restaurants/clubs, with 42 percent of respondents indicating a strong presence in the market

(up 13 percentage points from the 2021 study). While just 21 percent of BSCs in the study indicated a strong market presence in the transportation sector (fewest among all 10 categories), 82 percent of those same respondents indicated transportation as a target for growth (highest among the 10 categories). These statistics indicate that many BSCs are optimistic about the future — even if their current presence in certain sectors has room for improvement.

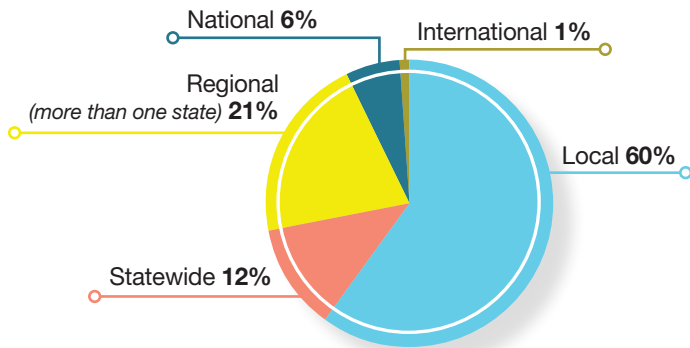
That optimism includes the continued interest in trends that gained traction over the last two years. For example, the adoption of electrostatic sprayers and UV technology now look established as staples of many BSC services. While fewer respondents increased UV or electrostatic this year (31 percent compared to 56 percent in 2021), more respondents indicated their usage of those technologies remained level year over year (51 percent in 2022, compared to 40 percent last year). That leaves just 19 percent of BSCs that reduced their use of these tools over the last 12 months.

A similar trend was revealed for overall cleaning frequencies. A remarkable 98 percent of BSCs reported that their frequencies have either increased (40 percent) or stayed the same (58 percent) since 2021. This indicates that while facilities may not be as restricted as they were in 2020, very few are taking their foot off the gas when it comes to a new, elevated standard of cleanliness. **CP**

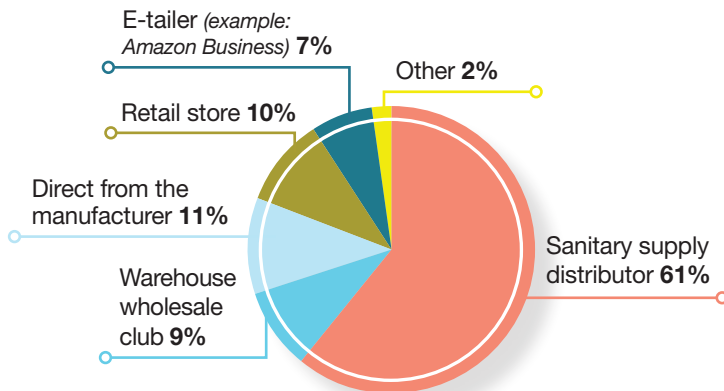
ContractingProfits



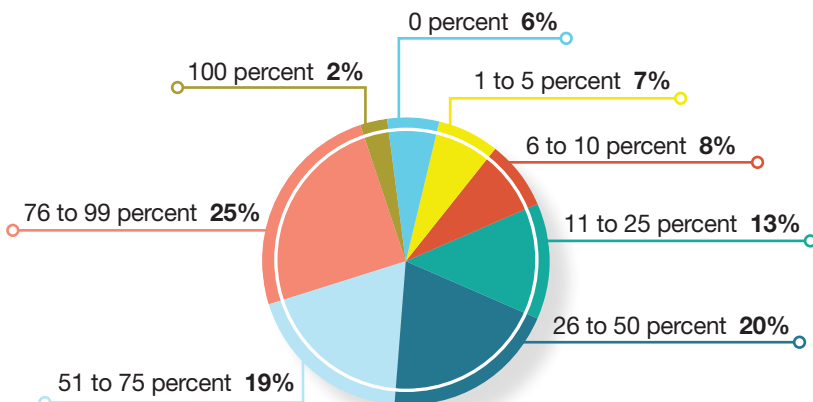
What market areas do BSCs service?



What percentage of BSC cleaning products and equipment are purchased through the following sources?



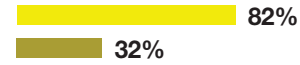
What percentage of the cleaning products used by BSCs are considered green?



What market segments are BSCs strong in now and what are targets for growth?

Strong in now **Target for growth**

Commercial (office buildings/property management firms)



Industrial (manufacturing plants/food processing/utilities/warehouses)



Healthcare (hospitals/nursing homes/clinics/medical/dental offices)



Religious (churches, convents, etc; EXCLUDING hospitals and schools)



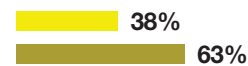
Educational (schools/colleges/universities)



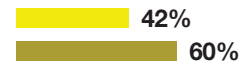
Government (municipal, county, state, federal)



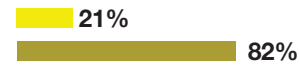
Retail (grocery stores/shopping malls/auto dealers/department stores)



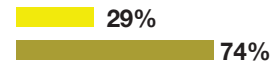
Restaurants/Clubs (stand-alone/country clubs)



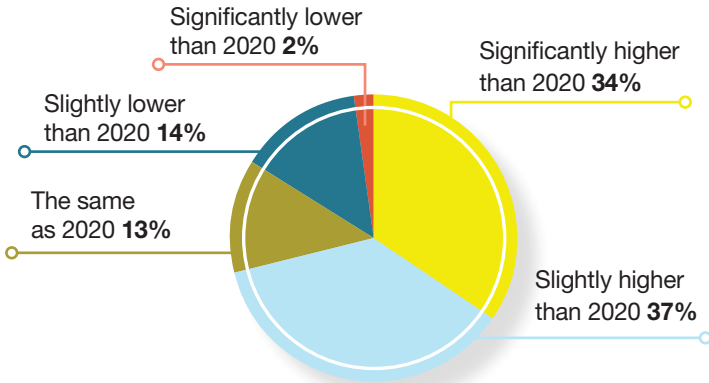
Transportation (airports/public transportation/airlines/bus and rail stations)



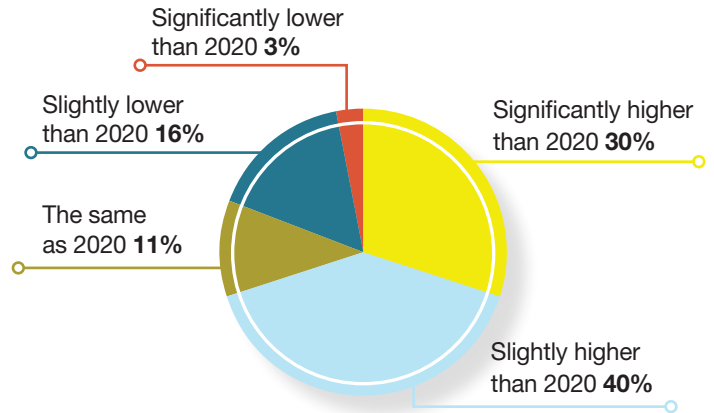
Recreation (sports stadiums/health clubs/movie theaters/casinos/bowling alleys)



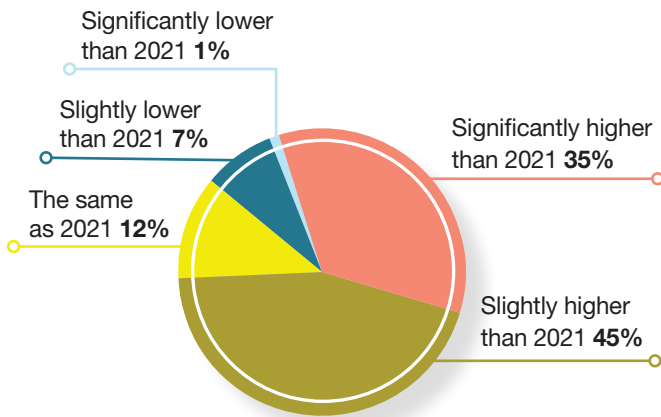
Sales in 2021 were:



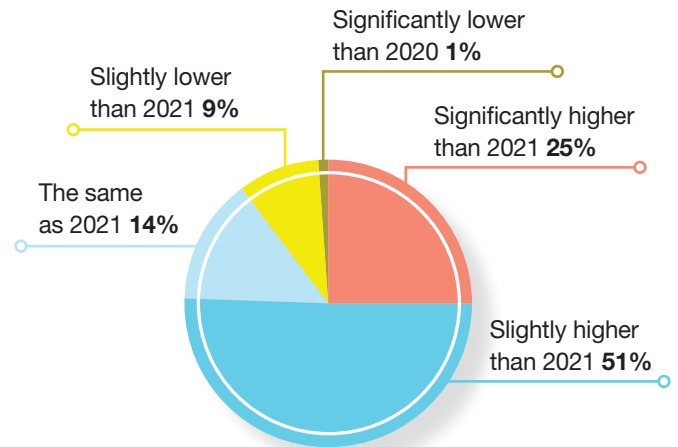
Profits in 2021 were:



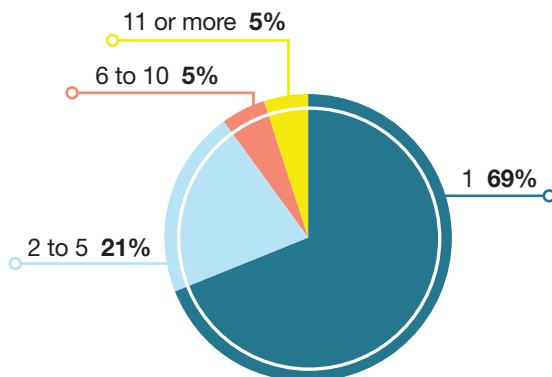
BSCs expect sales in 2022 to be:



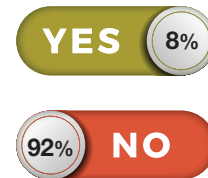
BSCs expect profits in 2022 to be:



How many headquarters and branch locations does the average BSC have?



Do your workers belong to a union?

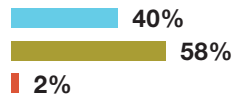


The average BSC services 285 accounts

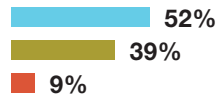
How do you see the ongoing pandemic and added attention to cleaning affecting your business moving forward in 2022?

■ Increase
 ■ Stay The Same
 ■ Decrease

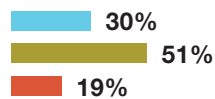
Overall cleaning frequencies



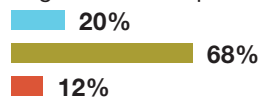
Disinfection of surfaces and touch-points



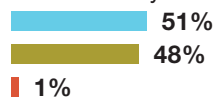
Adoption of new technologies such as electrostatic or UV



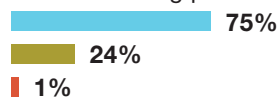
Interest in environmentally friendly or green certified products/processes



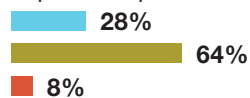
Client scrutiny of cleaning



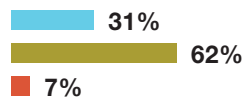
Cost of cleaning/price increases to clients



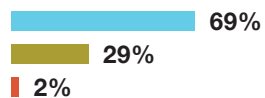
Importance placed on industry certification



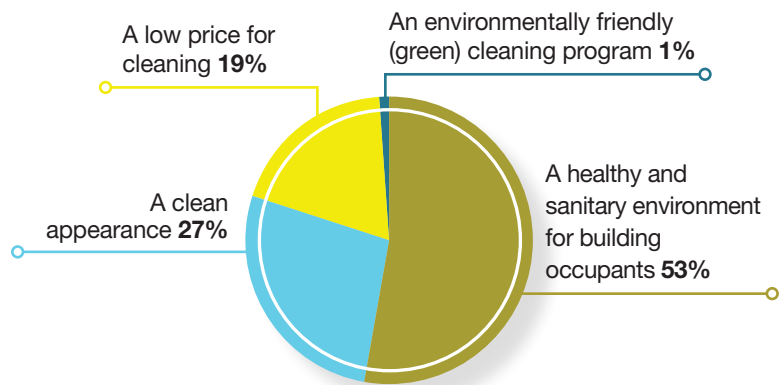
Trend toward outsourcing of cleaning tasks



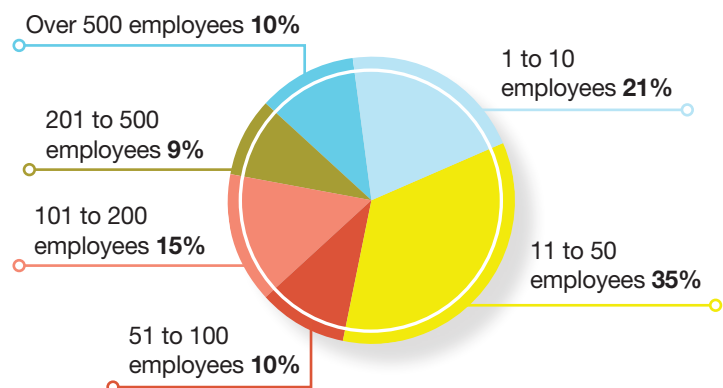
Number of clients/customers



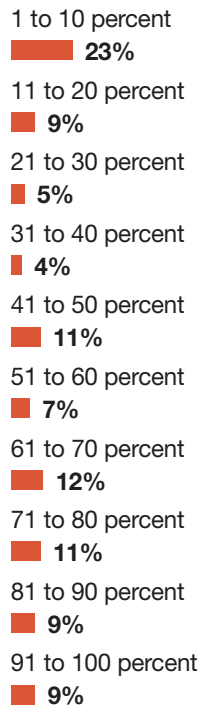
What is most important to facility customers?



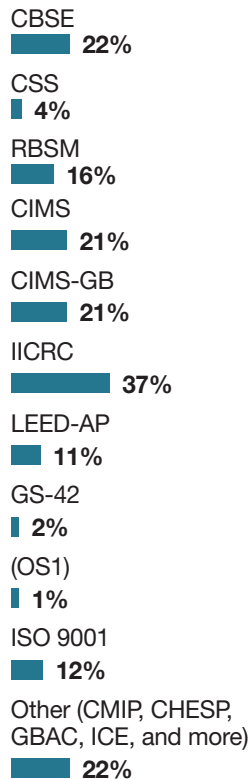
What is your target staff size?



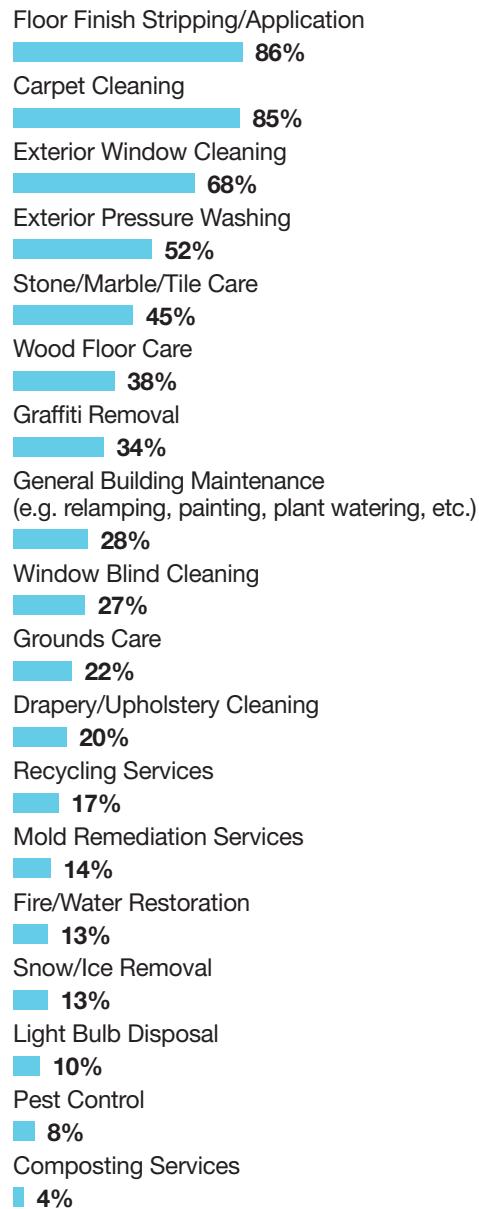
What percentage of your staff is part time?



Which certifications do BSCs earn?



Which of the following “special services” do BSCs currently provide or plan to provide in the next 12 months?



Do you plan on acquiring a cleaning company in the next 12 months?



