



2021

The Value of Clean

How Cleaning Improves Your Bottom Line

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Introduction

Background & Objectives

This study serves to update the initial ISSA Value of Clean study from 2012. These studies were put together in order to define the value of cleanliness for companies and to help provide insights to facility decision makers in a way that enables them to fully understand, evaluate, and justify their investments in cleaning.

This is achieved by the following objectives:

- Demonstrating how cleaning budget reductions can create unintended consequences that impact revenue.
- Verification of how investments in hygiene improve occupant health, safety, and wellbeing, increase employee productivity and help companies be more sustainable.
- Calculating the financial return on investment of improved cleanliness, quality management and ways to reduce costs.

Look for these symbols throughout the presentation



If a slide contains a calculator symbol, it means that a company can calculate their return on investment using the ISSA Value of Clean Calculator for that specific subject.



The star represents the GBAC Star certification that helps facilities demonstrate they have quality cleaning, disinfecting and infection prevention protocols.



This symbol represents opportunities to implement sustainable practices within your company via cleaning investments.

More information available in Next Steps (page 35-39)



Methodology

The information presented here was compiled during May 2020 through a secondary analysis by DTO Consulting GmbH.

For this informative presentation, existing information sources (e.g. studies & databases) regarding the value of cleaning in various regions and industries were evaluated and portrayed.

ISSA members are encouraged to reference this data in employee and customer discussions, as long as the original sources are referenced.

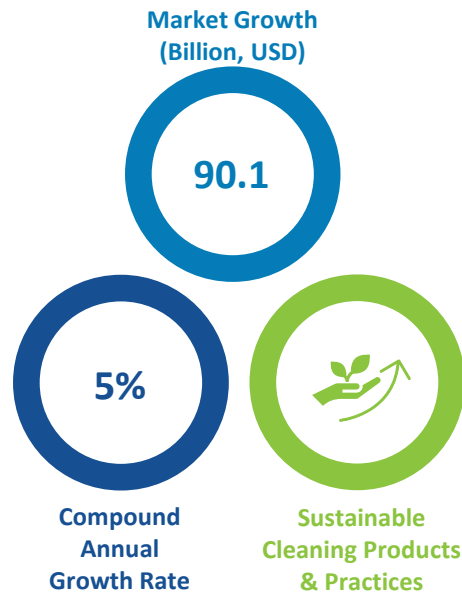


Industry Overview

Global Commercial Cleaning Services



Global Cleaning Services Market 2020 - 2024



Current Trends and Development

Commercial cleaning is the most dominant segment within the global cleaning industry with a 55% market share, followed by industrial cleaning with 30% and residential with 15%.

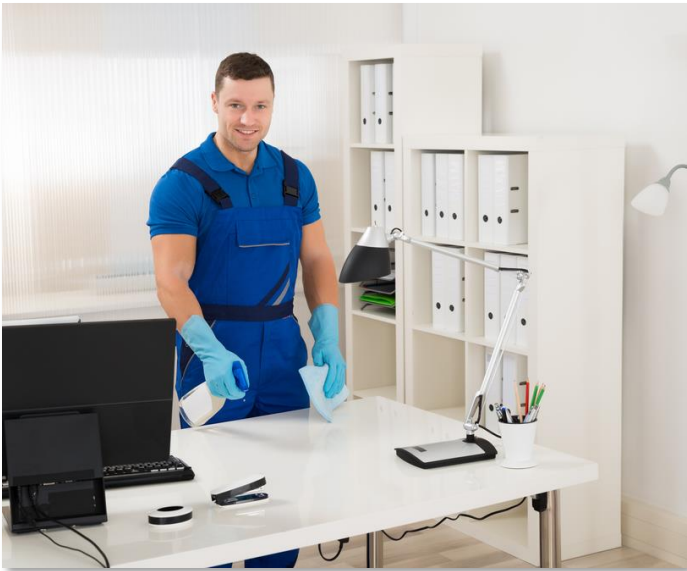
Contract cleaning services are favored by commercial end-users as they are an efficient option to reduce operational costs. As a result, contract cleaning services are expected to have an increase in growth based on a higher demand from various industries for cleaning services.

This increase in demand also stems from developing countries where an increase in the construction of commercial buildings and accelerated urbanization is apparent.

Sustainability and environmentally-friendly cleaning products and processes continue to gain importance in the cleaning industry. This green initiative goes hand-in-hand with consumers' increasingly eco-conscious attitudes as well as with raised awareness for the welfare and productivity of cleaners.



Source: [Cleaningservicereviewed.com \(2019\)](#), [TECHNAVIO RESEARCH \(2017\)](#), [Allied Market Research \(2017\)](#), [MRO Supply \(2020\)](#)



Cleaning is a Valuable Investment

Revenue Budget Impact



Cleaning Budget Impact

Why Invest Into Your Cleaning Budget?



Cleaning Effects Your Bottom Line

Although cleaning has traditionally been viewed as a cost, cleaning is connected to an organization's bottom line. Even relatively modest investments in cleaning produce substantial financial returns.

Investments in quality cleaning programs and practices lead to reduced operation costs through occupant wellness and productivity, asset preservation as well as sustainability. Social returns are also increased as cleaning improves company image and customer satisfaction.

Cleaning Budget Reductions

A cleaning budget reduction does not always save a company money and can, in turn, cause additional costs, such as expenses generated from service failures.

Service failures due to cut budgets and poor quality also is costly because additional labor is required to correct each cleaning deficiency and they require customer interaction that consumes management resources. For example, the cost of refinishing a floor may double if not performed correctly or if there is damage to the substrate. Floor replacement costs can be very expensive.



“The cost of poor quality is much higher than the cost of good quality.”

—Altran
(Capgemini Subsidiary)

Additional Cost Breakdown per Service Failure

The cost of resolving an issue includes time/cost to:

- Communicate complaint/request added work resulting from insufficient cleaning
- Schedule rework or remediate the situation
- Cost of labor to perform rework
- Assess the rework and confirm completion of the request
- Cost of losing a customer due to poor cleanliness





Occupant Wellness

Absenteeism, Presenteeism & Productivity



Occupant Wellness

Impact of Cleanliness on Absenteeism & Presenteeism



“Various sources including Statistics Canada indicate that absenteeism represents between 15% and 20% of all direct and indirect payroll expenses in Canada.”

-International Business & Economics Research Journal

“In general, a 1 percentage point increase in the rate of sickness absenteeism is estimated to decrease productivity by as much as 0.66%.”

- University of California at Berkley Institute for Research on Labor and Employment

- Cleanliness and hygiene are important factors for employees and employers in any industry.
- This is because not only do these factors allow for employees to feel good in their workplace and improve wellbeing, but they also proactively prevent sickness that would otherwise lead to absenteeism and presenteeism.
- Absenteeism can lead to higher direct costs and, together with presenteeism, they can decrease productivity in the workplace.



“On average, a shift worker in the U.S. costs a company roughly \$2,660 in excess absenteeism costs each year. For a company with 500 hourly shift workers, this translates to roughly \$1.3 million and this estimate only accounts for the direct costs of absenteeism”

-Circadian



Source: [IZA Institute of Labor Economics \(2018\)](#), [International Business & Economics Research Journal \(2016\)](#), [Circadian \(2014\)](#)

Occupant Wellness

Absenteeism



Absenteeism

Absenteeism can be defined as an individual's absence from work. There are various factors that can cause unplanned absenteeism. One of the most common factors is absenteeism due to personal illness.

Pathogens and infections can spread easily in an office that is not regularly and thoroughly cleaned and disinfected. This in turn increases the probability of an employee getting sick and missing work.

Absenteeism is costly for companies

Unplanned absences due to sickness not only generate direct costs (e.g. covering the absentee's work by either paying overtime or hiring substitutes), but these absences also inflict indirect costs such as a reduction in workplace productivity.

Sickness absenteeism can be quantified as the sum of hours per week an employee is absent from work due to a health-related reason. The cost impact can then be generally estimated by multiplying the hours of absenteeism and hours lost due to reduced productivity by an employee's hourly cost.

Sickness during illness outbreaks tends to have an even greater impact on lost productivity. The 2016 flu season was estimated to cost businesses USD \$5.8 billion in health care and lost productivity expenses, while the 2009 swine flu outbreak led to an estimated



“A large survey published by the Australian Industry Group (AIG) in 2015 estimated that absenteeism directly costs organizations AUD \$578 per employee per day of absence. In direct costs alone, the loss to the economy is said to be in excess of AUD \$44 billion per annum.”

—Australian HR Institute

economic loss of between .5 and 1.5% of gross domestic product in affected countries.

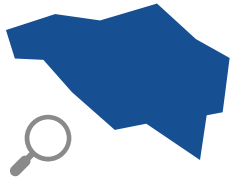
One study of sick leave data, in Chile, during the 2009 H1N1 pandemic, estimated that the drastic increase in work absence led to a labor productivity impact of USD of at least \$16 million. The same researchers extrapolated the data to estimate the lost productivity of the United States during the same pandemic to be approximately USD \$2 billion.



Source: *Procedia - Social and Behavioral Sciences* (2014), *International Business & Economics Research Journal* (2016), *Australian HR Institute* (2017), *IZA Institute of Labor Economics* (2018), *ISSA* (2020)

Occupant Wellness

Cleanliness Study: Impact of Absenteeism on Productivity



Country: Belgium

Industry: Varying

Firms: 1,107

Source: Industrial Relations
Journal Vol 59, No. 1, January
2020, University of California at
Berkley Institute for Research on
Labor and Employment



This study focused on how sickness absenteeism affects firm productivity. The study sample consisted of 5,319 observations from over 1,100 private companies in Belgium.

The main findings demonstrated that sickness absenteeism not only imposed direct costs on a company, but also reduced productivity.



“In general, a 1 percentage point increase in the rate of sickness absenteeism is estimated to decrease productivity by as much as 0.66%.”



It was found that sickness absenteeism affected productivity most when a high-position worker or blue-collar workers in an industrial or high capital-intensive company are sick and/or when it is a small- to medium-sized firm.



Since productivity growth is a well-known major source of sustained and sustainable economic growth, these findings show that policy makers and companies should then **invest more resources to improve workers' health.**



Source: Industrial Relations DOI Vol 59, No. 1, January 2020

Occupant Wellness

Presenteeism



Presenteeism

Presenteeism is when an employee comes to work while being ill. Not only are individuals commonly less productive when sick, but they also pose a threat to the rest of the occupants in a company. Presenteeism can sometimes lead to longer periods of absenteeism if an individual's condition worsens.

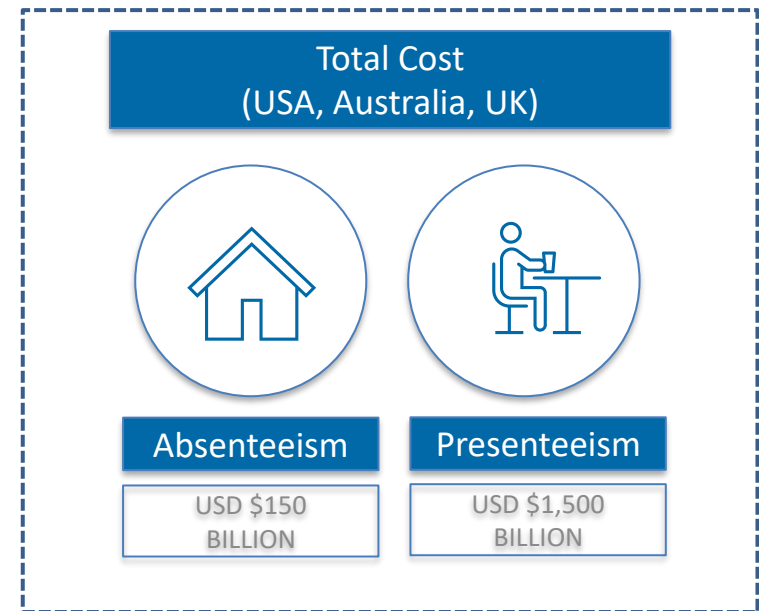
Presenteeism is costly for companies

Presenteeism can be harder to measure compared to absenteeism. This, however, does not mean it should not be considered, as reduced productivity via presenteeism can become more costly for companies than absenteeism.

Dr. Oliva Sackett reported in the Global Challenge Virgin Pulse that “Conservative estimates by the likes of PwC and Deloitte put the annual cost of absenteeism to businesses in the billions. But when we analyzed the data, we gathered from almost 2,000 participants in 17 countries it clearly showed that absenteeism levels were less than 10% of total presenteeism levels.”

Healthy & Clean Buildings

One of the many benefits of a clean facility is the reduction of harmful contaminants in the indoor environment. A clean and hygienic facility provides building occupants with a higher comfort level and reduces potential risks that may be associated with buildings that are not as clean, improving productivity deficits due to absenteeism and presenteeism.



Global Challenge Virgin Pulse



Source: Institute for Employment Studies (2016), Global Challenge Virgin Pulse (2015), ISSA (2020)

Occupant Wellness

Presenteeism in the Workplace



Country: United Kingdom

Industry: Varying

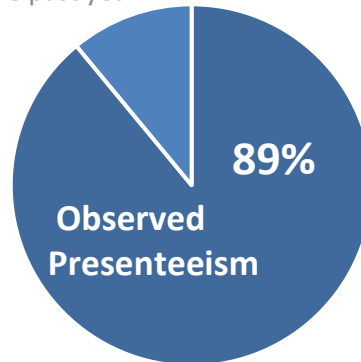
Professionals: + 1000

Source: CIPD Chartered Institute of Personnel and Development 2020

The twentieth annual CIPD survey focuses on the issues of health, well-being and absence in UK workplaces. Their survey covered over a 1000 professional workers from different industry backgrounds in the UK to provide relevant information for organizations regarding their employee's well-being.

The main findings regarding presenteeism and its commonality can be seen below.

Findings showed that most professionals 'observed' or experienced presenteeism (working when unwell) in their organization during the past 12 months. Twenty-five percent of respondents even reported that presenteeism rates had increased within the past year.



“There’s no point having robust and supportive sickness absence policies if people are working when they feel ill.”

The study shows that the ample proof of presenteeism in the workplace makes it a prominent example of a topic that needs to be addressed by an organization's management, if they want to build genuinely healthy workplaces.

CIPD states that failure to address presenteeism can result in long-term implications for employees' physical health as well as their organizational productivity.



Source: [CIPD Chartered Institute of Personnel and Development \(2020\)](#)

Occupant Wellness

Creating a Productive and Healthy Workplace



"Cleaning helps to remove pathogens or significantly reduce their load on contaminated surfaces and is an essential first step in any disinfection process."

-World Health Organization

"... There is a positive relationship between perceived cleanliness (satisfaction with cleanliness of the office) and satisfaction with elements of work speed, volume and quality, respectively."

-Wageningen University & Research

"92% (of industrial operators surveyed) claim that having a hygienic workplace gives them a peace of mind."

-GP PRO Industrial Segment Hygiene Story

- There are multiple factors that make up the foundation for a healthy workplace. Indoor air quality as well as cleanliness and maintenance are two main contributors.
- Office hygiene also plays a vital role in creating a healthy workplace. Hygiene strategies help reduce absenteeism and hygiene worries, ultimately increasing productivity and welfare in a company.



"Today, about 40% (of employees) globally say they often worry about becoming ill due to poor hygiene."

-Essity



Source: [Wageningen University & Research \(2017\)](#), [GP PRO \(2020\)](#), [Indoor Environment and Health \(2019\)](#), [Essity \(2018\)](#), [World Health Organization \(2020\)](#)

Occupant Wellness

Foundations of Healthy Buildings



Indoor Air Quality

Indoor air quality is considered one of the fundamentals for a healthy building. Focus on the air quality of office-like environments is increasing since it affects health, well-being and performance of occupants.

The Harvard T.H. Chan School of Public Health states that “dust acts as a reservoir for a variety of harmful agents – outdoor particles that penetrate indoors, viruses, bacteria, chemicals, allergens (pets, mites, mold spores, pollen), building materials...”. Air filtration and regular cleaning intervals help limit dust, dirt and pathogen accumulation.

Sustainable Cleaning Products

Regular cleaning chemicals can contribute to indoor pollutants. Thus, in order to maintain a clean and healthy working environment that includes indoor air quality, cleaning companies should be using non-toxic, environmentally certified cleaning products. Sustainable cleaning products are less hazardous and have positive environmental qualities. Products with low volatile organic compound content help improve indoor air quality.

According to the Ecolabel Index there are currently 73 ecolabels found globally regarding cleaning products and chemicals.

Examples of Cleaning Chemical Ecolabels



Greenguard Certification

Products with this label have low chemical emissions in indoor air during product usage. All certified products must meet stringent emissions standards based on established chemical exposure criteria.



U.S. EPA Safer Choice

This logo certifies commercial purchasers that they are selecting safer, effective chemical products that do not sacrifice quality or performance.



BASF Eco-Efficiency Analysis

Eco-Efficiency Analysis looks at environmental impact, including human toxicity potential, in proportion to a product's cost-effectiveness.



Occupant Wellness

Foundations of Healthy Buildings



Surface and Environmental Contamination Prevention

Businesses, including hospitals, sometimes see maintaining environment hygiene and cleanliness as an opportunity to cut budget costs. That being said, sickness prevention is always better and less expensive than a cure, for hospitals and businesses alike.

If averted costs were considered more often, companies would see the cost benefits that quality cleaning provides them. A study in West London showed that one moderately small outbreak of 40 hospital associated infection (HAI) cases could cost a hospital over 1 million euros.

To save costs in the long-term and improve patient/company satisfaction, hospitals and businesses need to invest in quality cleaning and hygiene practices.

Pathogens in the Workplace

Pathogens spread in the workplace:

- Via an infected individual touching surfaces
- Via droplets dispersed via sneezing or coughing

Once a surface is contaminated, the pathogens may endure from hours to months, allowing the potential spread to other individuals. The disinfecting frequency of surfaces depends on the risk area and traffic.

“

“72% of people are concerned about germs left on surfaces when using a break room or common area shared by colleagues/co-workers.”

-GP PRO Gen Pop Consumer Poll 2020

High Risk Areas

Hand or surface disinfection does not last for a long period of time. As soon as the hands or surfaces come into contact with viruses or bacteria, they are contaminated and must be disinfected. As a result, high traffic areas and commonly touched surfaces need to be frequently cleaned and disinfected. This process should be intensified during seasonal influenza peaks and outbreaks.



Source: [DTO Research Hygiene Study \(2020\)](#), [Antimicrobial Resistance & Infection Control \(2018\)](#), [Clinical Microbiology and Infection \(2016\)](#), [GP PRO \(2020\)](#)

Occupant Wellness

Spread of Respiratory Virus Pathogens on Surfaces



Country: Finland

Industry: Airport Travel

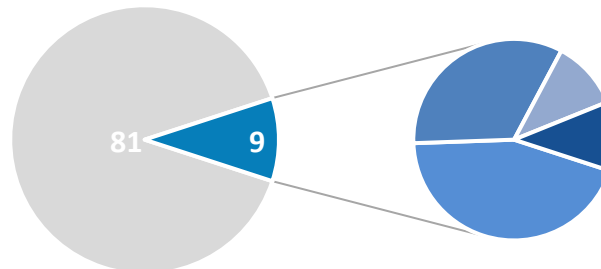
Samples: 90

Source: BMC Infectious Diseases 2018



This study shows the importance of frequent cleaning and disinfection in high traffic areas and commonly touched surfaces. It investigates the presence of respiratory virus pathogens in the passenger environment of the Helsinki-Vantaa airport. Ninety surface samples were taken throughout several weeks during the 2015-16 peak seasonal influenza period. These samples were tested by real-time polymerase chain reactions for influenza A and B viruses, respiratory syncytial virus, adenovirus, rhinovirus and four coronavirus types.

Viral Nucleic Acid Detection on Airport Surfaces



- No Detection in Sample
- Rhinovirus
- Coronavirus
- Adenovirus
- Influenza A

Study Conclusion

Even with a 10% detection rate, the study concludes:

"Detection of pathogen viral nucleic acids indicates viral surface contamination at multiple sites associated with high touch rates and suggests a potential risk in standard passenger pathways at airport sites."

The study recommends that measures, such as enhancing the cleaning of frequently touched surfaces, can help prevent the risk of transmission in an airport and other high traffic areas.



Occupant Wellness

Surface Contamination: Risk Areas in a Commercial Building



Source: [DTO Research Hygiene Study \(2020\)](#), [Kimberly-Clark Professional \(2020\)](#)

Occupant Wellness

Impact of Cleaning and Hygiene Practices on Virus Spread in a Building



Country: United States

Place: Office Building

Respondents: 100

Source: International Journal of Hygiene and Environmental Health 2019

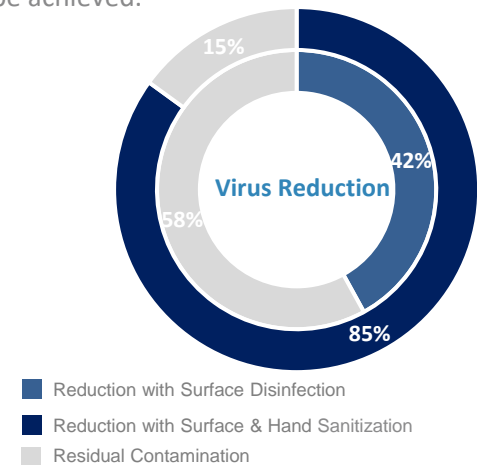
What role does hygiene play in an office environment?

This study looked at how office wellness impacted the reduction of viruses in the workplace. For this study, office wellness was made up of cleaning high-touch surfaces with disinfectant, as well as giving workers sanitizer gel and wipes to sanitize their hands. By monitoring viral transmissions throughout an office building with 41 offices and 116 cubicles, the study could evaluate the amount of virus traction on employee hands and office surfaces before and after efficient cleaning and disinfection.

"The surfaces identified as most contaminated were the refrigerator, drawer handles and sink faucets in the break room, along with push bars on the main exit of the building and the soap dispensers in the women's restroom."



When surfaces were cleaned and disinfected, virus concentrations alone were reduced by 41.7%. When combined with hand hygiene a virus reduction of 85.4% per surface area could be achieved.



Occupant Wellness

COVID-19: Workers Fear Germs Upon Return



Country: United States

Industry: Varying

Respondents: 516

Source: Georgia-Pacific
Professional 2020



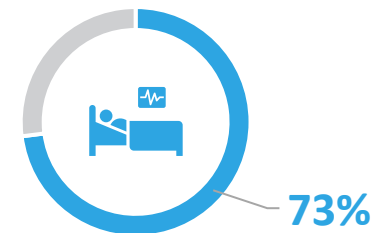
How do worker's feel about the office pre- and post-COVID-19?

This study from GP PRO, a division of Georgia-Pacific, takes a look at the “new normal” in office workplaces and what concerns employees have regarding hygiene and sanitation. 516 office employees were surveyed in the month of April 2020.

47% of employees worry that their workplace will not implement the right measures to ensure a hygienic environment.



73% of employees worry about the spreading of disease in the office.



“Following the heightened awareness of cleaning and hygiene measures to reduce risk of COVID-19 infection, employees and customers will expect your facility to have stepped up these activities going forward. This isn't just an option for a brief period of time; it is an expectation that is here to stay. So you will need to plan for long-term investments in cleaning, and the sustained benefits of healthier employees will help you offset this.”

Dianna Steinbach, ISSA VP of International Services



Source: GP PRO (2020), ISSA (2020)

Occupant Wellness

Cleanliness Study: Importance of Surface Cleaning to minimize the spread of infection



Country: Australia

Industry: Healthcare

Sources: "Transfer of dry surface biofilm in the healthcare environment: the role of healthcare workers' hands as vehicles"¹, "Transmission of Staphylococcus aureus from dry surface biofilm (DSB) via different types of gloves"²

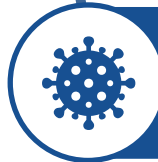


Dry surface biofilms (DSB) are the collective of one or more types of microorganisms that can grow on many different dry surfaces. Multiple studies have found that people who touch surfaces that contain these DSBs can then transfer microorganisms further in levels high enough to cause infections. Two specific studies explored the hypothesis that healthcare workers' hands may be vehicles of transmission, and hence may transmit bacteria associated with healthcare-associated infections (HAIs.)

The main findings demonstrated:



Hands that touch a contaminated surface could pick up enough microorganisms to transmit infection-causing levels for as many as the next 19 touches.



Bacterial cells were readily transmitted by nitrile, latex and surgical gloves, with transmission rates 6 times higher using nitrile or surgical gloves. Therefore, gloved hands can readily transmit hospital-associated infection causing microorganisms.



Investing in good hand hygiene and a frequent and effective cleaning program is critical to minimize the spread of infection responsible for colds, flu, gastrointestinal illness or even COVID-19.

ISSA

Source: 1. [Journal of Hospital Infection](#) 2. [Journal of Infection Control & Hospital Epidemiology 2019](#) courtesy of Whiteley Chemical

Occupant Wellness

Foundations of Healthy Buildings



Office Hygiene

Improved office hygiene can reduce probability of infection for common cold and influenza by approximately 80% and reduce the number of surfaces contaminated by viruses by 62%.

Measures to improve office hygiene include:

- Continuous cleaning and disinfecting of high-risk areas, such as doorknobs, tables and visitor areas.
- Including building service providers and cleaners in hygiene strategies.
- Providing readily available wipes and disinfectant products for workers and visitors to self-sanitize hands or surfaces.



Impact of a Comprehensive Workplace Hand Hygiene Program

A study from the Journal of Occupational and Environmental Medicine in 2016 showed that hygiene-preventable health care claims were significantly reduced when hand sanitation education and sanitizer products were provided by the company. In other words, sick-leave was reduced by 20% showing how hygiene has a positive consequence on the rate of absenteeism.



Source: Kimberly Clark Professional (2010), [Journal of Occupational Environmental Medicine \(2016\)](#), [GP PRO \(2020\)](#)

Occupant Wellness

Impact of Cleanliness on Productivity



Country: Netherlands

Industry: Non-profit
Organizations

Respondents: 120

Source: Wageningen University
& Research 2017



What is the relationship between facility management and productivity?

Researchers from the Wageningen University in the Netherlands investigated how the work environment cleanliness effects employees' perceptions of productivity. Data for this study was made up of 120 employee interviews, visual assessment of surface cleanliness, and measurement of dirt particles in the air from 5 various non-profit organizations. The key findings are presented below.



"When the office environment is more polluted (less surface cleanliness and higher particle counts), employees experience lower productivity."



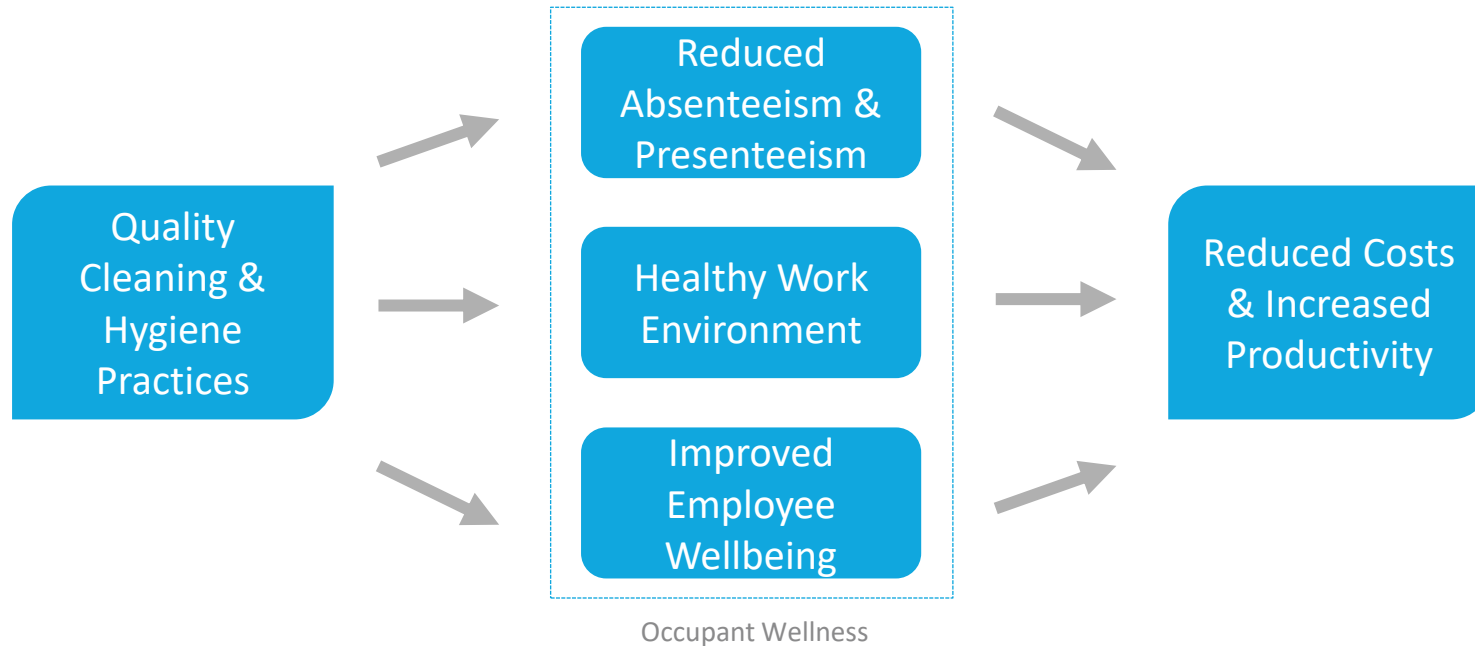
"A clean office environment has a positive effect on the work satisfaction of employees."

ISSA

Source: Wageningen University & Research (2017)

Occupant Wellness

Preventing Absenteeism & Presenteeism While Improving Productivity



The true value associated with the investment in quality cleaning operations results in reduced operating costs through occupant wellness, asset preservation & sustainability, as well as an increase in social returns through improved company image and client satisfaction.



Building Wellness

Asset Preservation & Efficiency



Building Wellness

International Case Studies: Asset Preservation & Efficiency via Cleaning



"In fact, smart and strategic maintenance can actually save you money. By investing a little in keeping a product functioning at a high level, you can save yourself the high-cost repair or replacement down the line. That's certainly the case with the carpeting in your facilities."

-DPM Care

"Environmental Considerations... A policy of undertaking daytime cleaning; whereby cleaners work during existing office hours, rather than requiring lights to be on during the night and outside the hours that the client's premises are open."

-UNI Europa

- Not only does cleanliness improve productivity and generate occupant wellness, it also helps preserve a company's resources and creates opportunities for sustainable, efficient practices.
- A building's assets have life expectancies. Thorough maintenance plans and schedules help resources meet and even extend expectancies.

"Dust has a not inconsiderable impact on lighting efficiency. If cleaning is carried out only annually, one can expect a 10% to 15% reduction in illuminance."

-IEA-SHC



Source: [IEA-SHC \(2015\)](#), [UNI Europa \(2016\)](#), [DPM Care \(2016\)](#)

Building Wellness

Asset Preservation: Flooring



Why is the frequency and quality of floor cleaning important?

Frequent and quality carpet and floor care not only significantly impacts a building's appearance, but it also plays a large role in the preservation of assets.

Dirt and poor maintenance reduce a floor's quality, as well as its lifetime. Institutions such as the Carpet and Rug Institute prescribe cleaning frequency minimums because of this reason.

Warranties are often based on scheduled maintenance.

Life Cycle Costs per Year

Flooring costs per year are formed from

Cost of installation / Flooring life in years

+ Removal and disposal cost / Flooring life in years

+ Yearly cleaning costs

Poor maintenance and cleaning frequency can lead to the reduction of a floor's lifetime and ultimately increase flooring costs per year.



“A properly cared-for carpet can last up to three times longer than one that is not well maintained.”

–The Carpet and Rug Institute

Sustainable Floor Cleaning

Econyl, a trademark of Aquafil in Italy, recommends using cleaning products that are environmentally friendly as well as achieving a regular cleaning routine in order to help meet sustainability goals.

Regularly cleaning using certified cleaning solutions not only reduces a floor's total carbon footprint, it also significantly reduces chemical waste. Choosing vacuums and cleaning machines that are energy efficient and which use water sparingly helps contribute towards being more sustainable as well.



Building Wellness

Case Study: Floor Life Cycle Comparison



Country: United States

Flooring: Carpet

Office Size: 83000 ft² (7710 m²)

Source: DPM Care

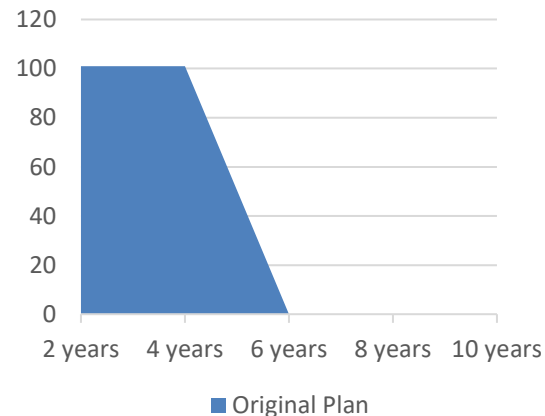


Strategic floor maintenance is a very important factor when it comes to increasing a company's cleaning return on investment. Since smart maintenance and cleaning programs prolong a floor's lifetime, costs are able to be spread out over a longer period of time.

This case study shows the return on investment that can be achievable with such asset preservation.

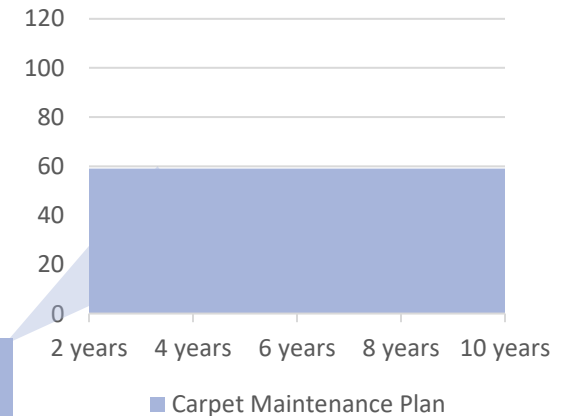
Original Plan: USD \$506,000 Total Costs

- No maintenance plan
- 5-year carpet lifetime
- Yearly cost of USD \$101,000



Maintenance Plan: USD \$597,000 Total Costs

- Customized maintenance plan
- 10-year carpet lifetime
- Yearly cost of USD \$59,000



Savings of
USD \$41,500
per year



Source: [DPM Care \(2016\)](#)

Building Wellness

Energy Efficiency



Energy Costs

Lighting is one of the most important influences in the workplace when it comes to energy as it can account for 18% of electricity in the commercial sector. The amount of energy a company uses for lighting depends on various factors such as

- Number of lighting fixtures
- Lighting management (sensors)

The amount of electricity consumed is measured by Kilowatt Hours (kWh). A company can look at their most recent utility bill to determine their cost per kWh. Alternatively, there are numerous websites that provide cost ranges by geographic region.



Energy Reduction via Daytime Cleaning

Daytime cleaning refers to cleaning which is conducted during normal office and business hours. This trend has been constantly increasing over the past ten years. Not only does daytime cleaning provide benefits for the cleaning workers themselves, but it can also help a company save costs and be more environmentally considerate.

- Nighttime cleaning can account for almost 25% of a business's weekly lighting use. This amounts to around 7% of total building energy use.
- Daytime cleaning prevents lights having to be on during the night and outside the company's regular hours.

Light Efficiency Through Cleaning

Maintaining the quality of resources is an important factor when it comes to the energy performance of a building.

Dust, for example, imposes a considerable influence on lighting efficiency. A 10-15% reduction in illuminance is apparent when light fixtures are not properly cleaned throughout the year and are only cleaned annually.

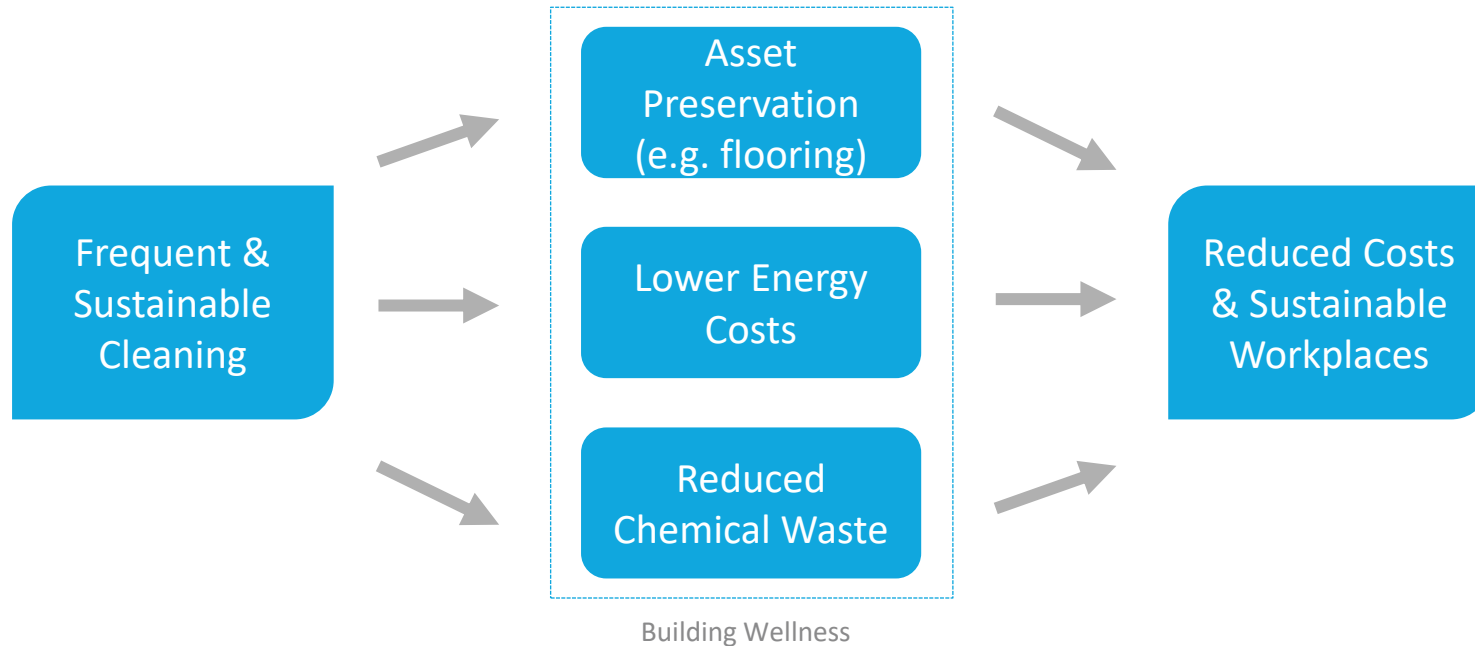
The cleaning and upkeep of windows also influences energy performance since regular window cleaning positively impacts the amount of natural light that is transmitted.



Source: Eskom Integrated Demand Management (2015), Selecting Best Value Guide (2016), Building Owners and Managers Association's Building Energy Efficiency Program (2019), IEA-SHC (2015), Diversey Day Cleaning Certification Program (2010), AlSCO New Zealand (2016)

Building Wellness

Asset Preservation & Sustainability



The true value associated with the investment in quality cleaning operations results in reduced operating costs through occupant wellness, asset preservation & sustainability, as well as an increase in social returns through improved company image and client satisfaction.





Customer Satisfaction

Company Image



Customer Satisfaction

International Case Studies: Impact of Retail Store Cleanliness on Customer Satisfaction



"66% of shoppers would reduce their shopping time to avoid unacceptable hygiene."

-Initial

"79% of EU citizens feel less inclined to shop when the store's environment is dirty."

-A.I.S.E

- Consumers are being driven by experience more than ever before as competitive gaps, including price and offerings, narrow in the retail industry.
- A store's hygiene can be considered an additional point within a shopper's buying criteria.
- Since attaining return business is crucial to success in the retail sector, a poor company image due to insufficient cleanliness could drive away customers and sales and therefore be greatly destructive.



"In China, for example, 65% of consumers indicated that they expect to care more about product safety after COVID-19 than prior to COVID-19. Retailers must implement policies and processes to enable safe distances, sanitize surfaces and products..."

-McKinsey & Company



Source: National Retail Federation (2018), Initial (Status 2020), A.I.S.E (2017), McKinsey & Company (2020)

Customer Satisfaction

Cleanliness Study: Importance of Cleanliness in a Business



Country: United States

Industry: Retail, Service

Respondents: 1,008

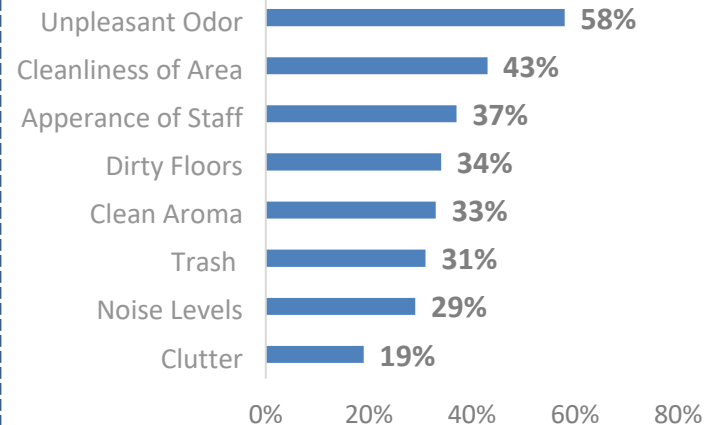
Source: Ipsos Public Affairs 2017



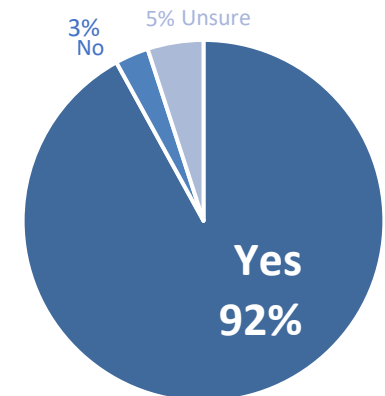
This study examined how important it is for a business to be hygienic and clean for its customers. The study's questionnaire referred to and included various types of retail and service businesses (e.g. stores, bakeries/cafes, etc.).

Below are two sample questions from this study that greatly reflect the importance of cleanliness in a business.

Looking at the list of items below, which of the following would you notice right away if you encountered them upon walking into a business (e.g., restaurant, hotel, salon, medical office, etc.)? Please select the top three.



As a customer, is the cleanliness of a business an important factor for you when deciding whether you will be a repeat customer or not?



Source: Ipsos Public Affairs (2017)

Customer Satisfaction

COVID-19: Adapting to the Next Normal in Retail



Country: General Population

Industry: Retail, Service

Respondents: 5,013

Source: McKinsey COVID-19
Mobile Survey, April 21–25, 2020



This study inspected how companies will have to adapt in order to meet dramatically-evolving consumer requirements when it comes to retail shopping experiences post COVID-19. The study focuses on various changes, including providing safer experiences for customers while in stores.

Below are points from this study that show what a safer experience while shopping will likely entail.

Goodbye Traditional Store Operations

The COVID-19 crisis has brought new factors to the formula for customer experience. These include

- Preferences for self-service
- Physical distancing

With these new factors, previous satisfaction factors such as

- Hygiene and cleanliness

are heightened. They play an even larger role now as retailers must implement new policies and business models to enable continuous sanitization throughout stores.

Cleaning is Nonnegotiable

Cleaning, although always an important customer satisfaction factor, is now nonnegotiable when it comes to planning service and experience elements for retail stores.

Cleaning processes will be at the core of new safety requirements that are implemented in order to make in-person interactions and experiences the norm again.



Source: [McKinsey & Company \(2020\)](#)

Customer Satisfaction

International Case Studies: Impact of Hospitality Business Cleanliness on Customer Satisfaction



"93% of consumers say restaurant cleanliness is important or very important. That's even higher than kitchen cleanliness—89%..."

-Consumer Brand Metrics

"For 94% of EU citizens, clean dishes are as important as food quality."

-A.I.S.E

- Customer satisfaction plays a vital role when it comes to customer loyalty and desired retention in the hospitality sector.
- Various studies around the world continue to highlight the close correlation between cleanliness and customer satisfaction.
- In developing and developed countries alike, the amount of cleanliness can significantly influence the perceived service quality in a hospitality business.

"In terms of restaurant, the customers considered ambience cleanliness of dining areas most important, where 84 out of 108 respondents agreed that dining areas must be clean. Cleanliness of bathrooms was the next most important aspect."

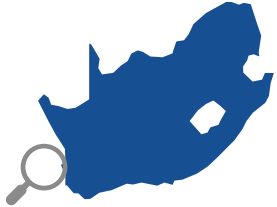
- Intl. Journal for Research in Appl. Science & Eng.



Source: A.I.S.E (2017), Consumer Brand Metrics (2019), International Journal of Culture, Tourism and Hospitality Research (2017), Intl. Journal for Research in Appl. Science and Engineering Technology (2017)

Customer Satisfaction

Cleanliness Study: Customer Expectations in the Hospitality Industry



Country: South Africa

Industry: Hospitality

Respondents: 100

Source: African Journal of Hospitality, Tourism and Leisure 2017



This research study was carried out in Mahikeng of the North West Province, South Africa. The hotel used for the sample group provides accessibility in relation to multiple purposes such as business and entertainment. The sample group is made up of local guests, as well as international customers from various countries such as Botswana, Namibia, China and Spain.

Key findings from the study regarding cleanliness are displayed below.

Customers want quality: What does that entail?

The top characteristics of service quality sought after most by customers when it comes to a hotel are:

1. **Venue hygiene**
2. **Timely service**
3. **Good employee attitude**

These results put hygiene above quality factors such as efficient internet availability and food services.

What next?

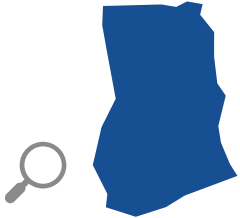
The study results determine that service standards which improve service conditions and outcomes for customers, such as quality cleaning processes, should be designed and implemented.

Knowing what customers value most when it comes to service quality (hygiene, prompt service and good employee attitude) can benefit hotels that are seeking to attain and uphold the standards which make guests return.



Customer Satisfaction

Cleanliness Study: Impact of Sanitation on Customer Retention



Country: Ghana

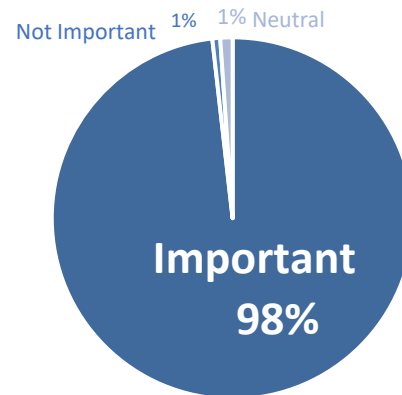
Industry: Hospitality

Respondents: 600

Source: Open Access Library
Journal, 6: e5967 2019

This study observes the impact that sanitation has on customer retention in restaurants. Since customer satisfaction closely correlates with the quality of service and if the customer is willing to return or not, customer perceptions on various sanitation variables were examined. The focus country is Ghana whose dining-out situation, due to growing urbanization, was related to that of the United Kingdom.

"The majority of the customers (98.2%) perceived dining area cleanliness to be an important factor that can influence their retention in the restaurants they eat."



Cleanliness = Retention

Although the cleanliness of a restaurant is not the only factor that determines if a customer returns or not, it is an integral part of a customer's experience. As a result, it greatly influences future purchasing behavior.

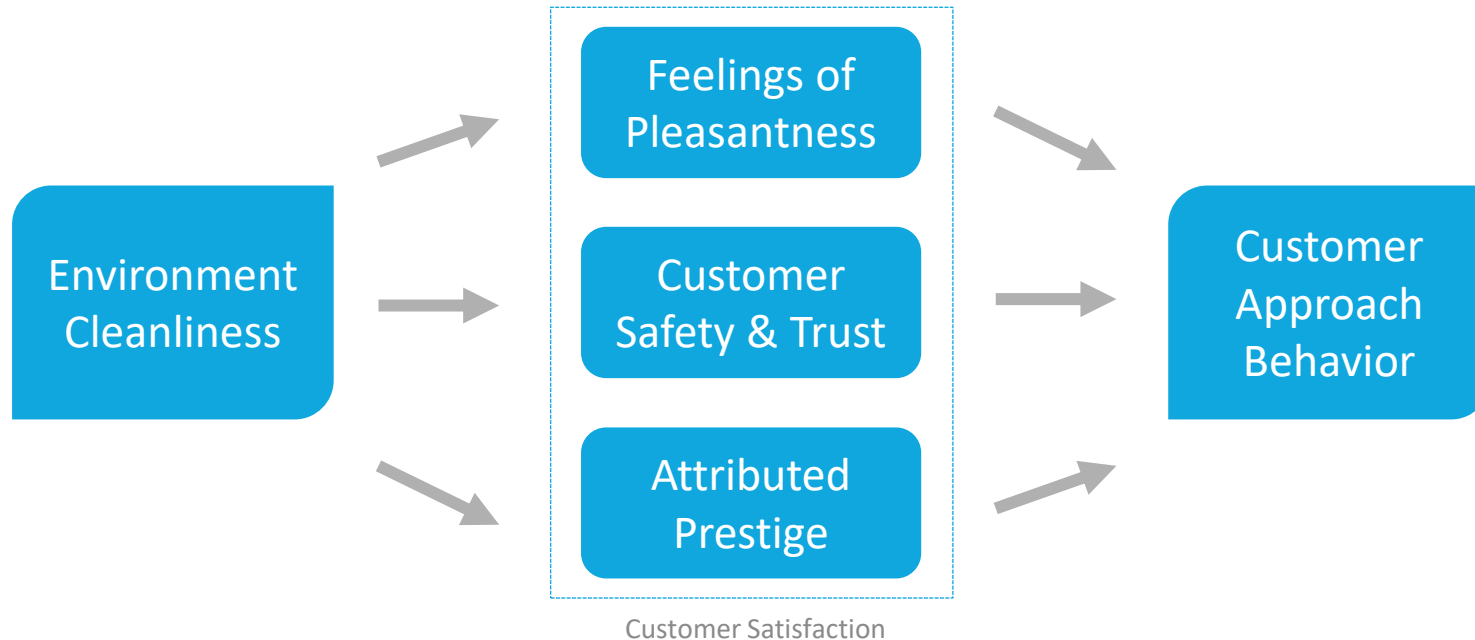
This study, like many others, underlined how important cleanliness is in customer satisfaction and why it is therefore important to maintain.



Source: [Assessing the Impact of Sanitation on Customer Retention: A Survey of Restaurants in the Tamale Metropolis \(2019\)](#)

Customer Satisfaction

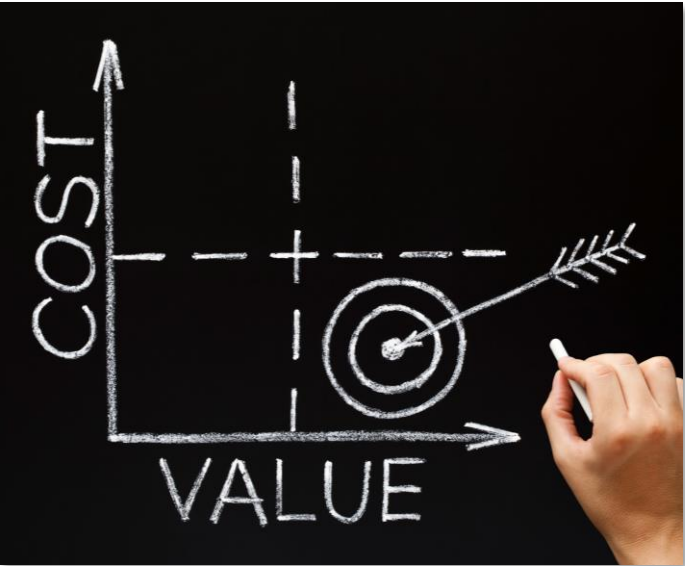
Cleanliness = Satisfaction



The true value associated with the investment in quality cleaning operations results in reduced operating costs through occupant wellness, asset preservation & sustainability, as well as an increase in social returns through improved company image and client satisfaction.



Source: Diagram based off „The Effect of Servicescape Cleanliness on Customer Reactions“ Services Marketing Quarterly 31(2):213-234



The Value of Clean

Total Return on Investment & Next Steps



The Value of Clean

Financial and Social Return on Investments



What is the value of clean?

Cleanliness improves your bottom line regardless of the industry or region your business is in.

This is achieved through the reduction of operational costs:

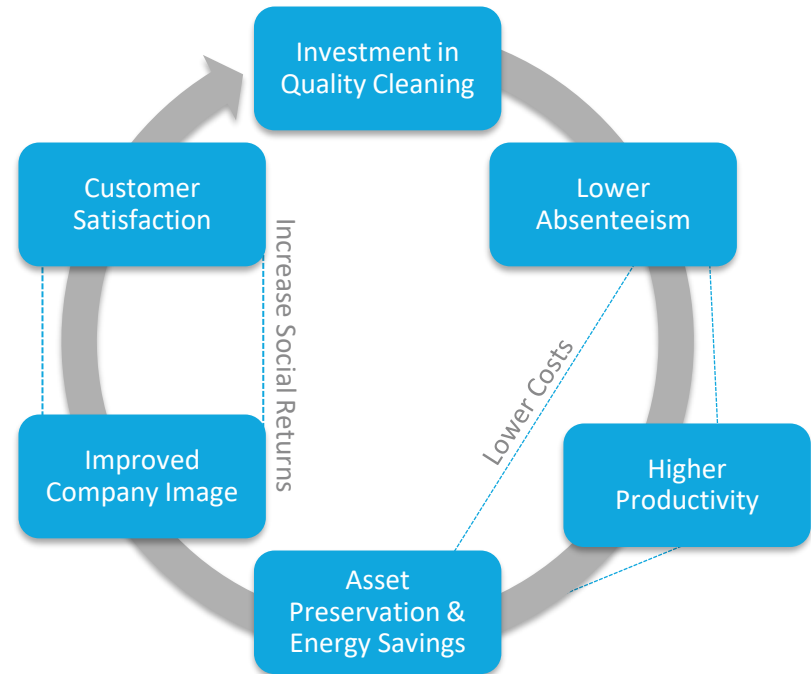
- Lower absenteeism
- Higher productivity rates

Through sustainable operations:

- Preservation of assets
- Energy savings

As well as through increasing your social return:

- Improved company image
- Customer satisfaction



Next Steps

Laying the Foundation



Before you can determine the proper investment in cleaning products or services, or calculate the financial benefits they provide your company specifically, important steps include:

- Establish quality management standards
- Properly workload all tasks to determine frequencies, staffing and budget needs
- Track financial impact of cleaning services
- Obtain surface life cycle data
- Obtain human resources data regarding organization absenteeism, wage rates and other productivity indicators



In order to conduct these steps, the ISSA has various tools that are available to members and their clients...



Next Steps

Quality Management Foundation Tool



The Cleaning Industry Management Standard (CIMS) was created for building service contractors and in-house service providers.

It applies to an organization's management and performance systems and processes.

It should be thought of as a framework to help facility service providers develop customer-centered organizations.

1. Quality Systems
2. Service Delivery
3. Human Resources
4. Health, Safety & Environment
5. Management Commitment
6. Green Buildings & Service



Next Steps

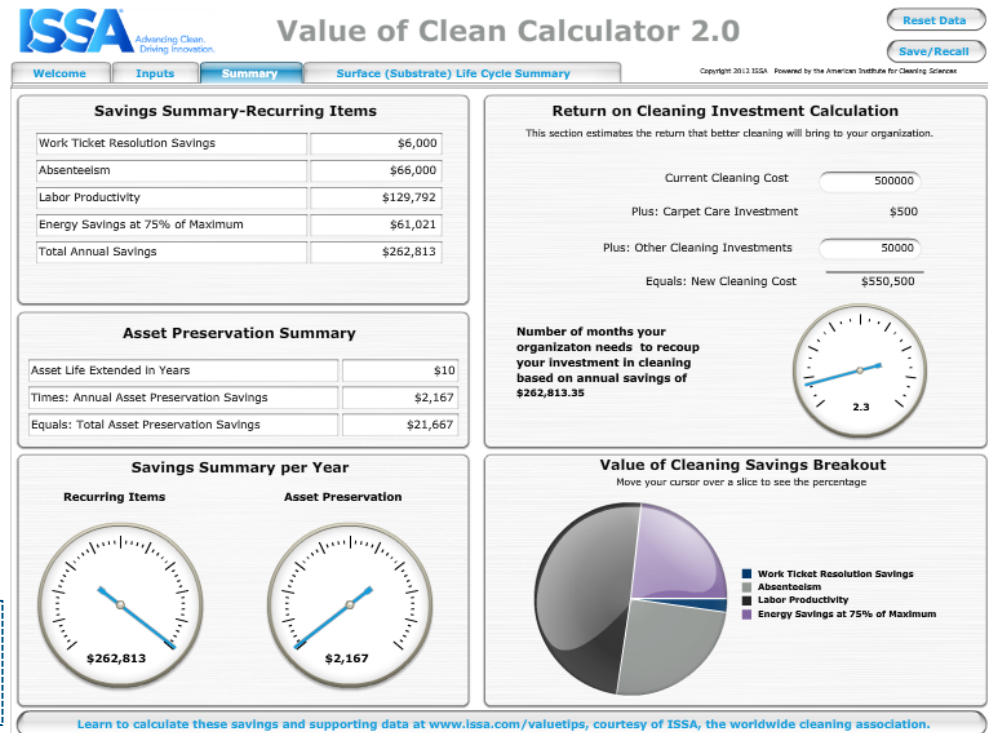
Value of Clean Calculator 2.0



ISSA-member companies have access to an exclusive calculator that quantifies the total value of proper cleaning to an organization in six critical areas. Visit issa.com/value to download a copy of the Value of Clean calculator.

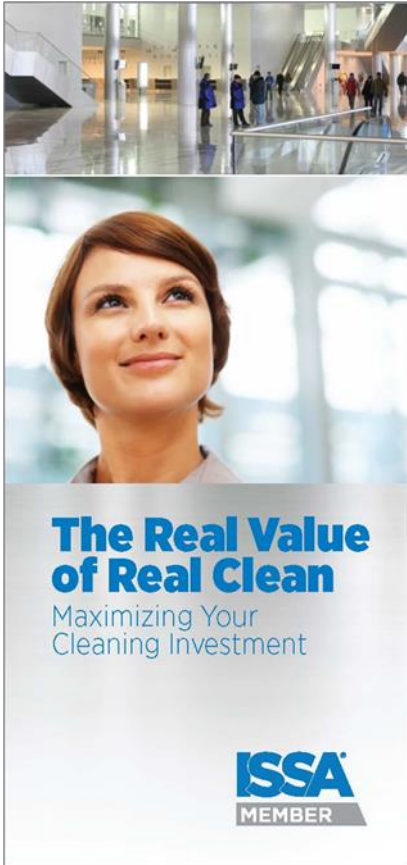


If a slide contains a calculator symbol, it means that your company can calculate the return on investment using the ISSA Value of Clean Calculator for that specific subject.



Next Steps

Find the ISSA Value of Clean Toolkit at issa.com/value



Value of Clean Calculator 2.0

NEW: Value of Clean Data Report

Workloading Resource Tools

Power of Clean Video

Value of Clean White Paper, Infographic and PowerPoint

Workloading & Bidding Tool at issa.com/workloading



About ISSA

The Worldwide Cleaning Association

With more than 9,300 members globally—including distributors, manufacturers, manufacturer representatives, wholesalers, building service contractors, in-house service providers, facility managers, residential cleaners, and associated service members—ISSA is the world's leading trade association for the cleaning industry.

The association is committed to changing the way the world views cleaning by providing its members with the business tools they need to promote cleaning as an investment in human health, the environment, and an improved bottom line.

Headquartered in Northbrook, IL, USA, the association has regional offices in Mainz, Germany; Whitby, Canada; Parramatta, Australia; Seoul, South Korea; and Shanghai, China.

Visit issa.com, join the discussion with ISSA's LinkedIn group, and follow ISSA on www.facebook.com/issaworldwide and www.twitter.com/issaworldwide.

CHANGING THE WAY
THE WORLD
VIEWS CLEANING

Dianna Steinbach ISSA Vice President of International Services

"It's time that facility decision-makers recognize the value of clean as the profit center it truly is: a necessary investment in better health, a better environment, and a better bottom line. This is more important now than ever before."

Too often cleaning is seen as a cost to be cut, which results in unintended consequences such as the reduction of occupant wellness, increase of infection rates, waste of resources, and decrease in employee productivity. ISSA, the worldwide cleaning industry association, has gathered valuable market data and study results to help its members, facility managers and business owners make the business case for proper levels of cleaning."

