IN-HOUSE/FACILITY MANAGEMENT

BENCHMARKING SURVEY REPORT



e all can say with certainty that 2020 was a year that changed the cleaning industry forever, but how did those changes play out in the facility services sector? The 2021 CMM In-House/Facility Management Benchmarking Survey Report, sponsored by Coastwide Professional™, offers a glimpse into how the global pandemic affected facility managers and in-house service providers, how they've adapted, and what trends they'll see for the rest of 2021.

In addition to the usual questions about operating budgets and problem areas, we asked facility managers questions directly related to the coronavirus pandemic such as how staffing changed, if they purchased more disinfecting chemicals



ABOUT THIS REPORT: The data in this survey is based on results from email solicitations sent to the CMM/ISSA community of in-house service providers and facility managers in the United States from February 8 to 28, 2021. A total of 596 participants took the survey and 414 completed surveys were received. Results are self-reported and not necessarily based on audited financial statements.

and equipment, and what types of health and safety measures they installed in their facilities. Here is a snapshot of their responses:

- Staffing is stable—The good news is more than half (68%) of respondents said staffing has remained the same or increased in 2021. Only 15% had to reduce or eliminate staff, and 17% reduced or furloughed staff with plans to bring workers back.
- Budgets are down or flat—Overall, 2021 operating budgets aren't as fat as they were when 2020 budgets were set before the onset of the pandemic in the U.S. Nearly three-fourths (71%) of respondents reported either a flat or decreased budget for 2021. Broken down, one-third (33%) of respondents reported they will work with a flat budget and even more (38%) will have less to spend this year. Only 20% will have more to spend than they did in 2020, down 16% from the 36% who reported an operating budget increase last year.
- Disinfection purchases are up-Respondents met the challenge of fighting a new, deadly virus from spreading in their facilities by purchasing more disinfecting chemicals and equipment in 2020 versus 2019. The largest group of respondents (34%) said they purchased 1-20% more disinfection products compared to 2019 and 28% reported they purchased 21-40% more. Most respondents (57%) expect 2020 purchasing levels to remain consistent for 2021 and 24% expect they will purchase even more disinfection items this year. Those purchases include new technology and equipment such as electrostatic sprayers, the top choice by far of new technology that facility managers report they will adopt in the next 12 months.
- Health and safety is top priority—Our surveys consistently show "health and safety" comes out on top when facility managers are asked to rank the most important issues affecting their operations. Eighty-two percent of respondents said health and safety was important "to a large extent" compared to 76% last year. Improving facility image,

Survey Prize Winners

Sponsored by:

COASTWIDE

Congratulations to the five survey participants who received a gift basket filled with on-the-go business essentials (valued at \$100), courtesy of CMM's survey sponsor Coastwide Professional™:

- Tamar Gutterson
 Sugarbush Resort
- David Munoz
 Hyatt Place El Paso Airport
- Terry O'Brien

 Buffalo Niagara Convention Center
- Brian Staples
 Orchard Springs Elementary
- John Weaver State of Idaho Swim Center

improving productivity/efficiencies, security, and asset preservation rounded out the top five most important concerns. When it comes to COVID-19, facility managers had to quickly adapt to implement new health and safety measures last year. More than 90% of facilities posted new signage, 81% installed partitions or barrier shields, and 72% instated touchless hand sanitizer stations, which have all become familiar sights of the new facility landscape.

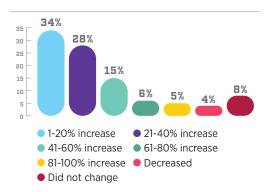
While comparisons are harder to make in a year that compares to no other, we hope this report will offer useful insights and clarity on how facilities around the country have adapted and are moving forward through 2021. We thank everyone who participated in this year's survey and commend you all on your resiliency and tireless efforts to keep facilities—and the people inside them—safe and healthy.

C RONAVIRUS AND YOUR FACILITY

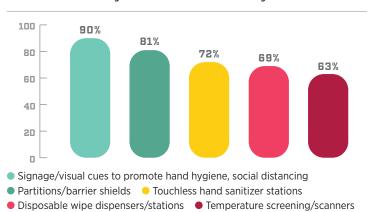
COVID-19 Impact on Staffing



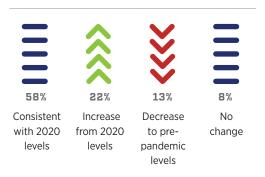
Disinfecting Chemicals/Equipment Purchases 2019 vs. 2020



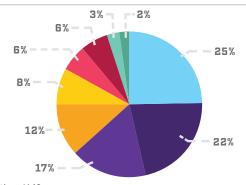
New Facility Health and Safety Measures



2021 Disinfecting Chemicals/ Equipment Purchases Forecast

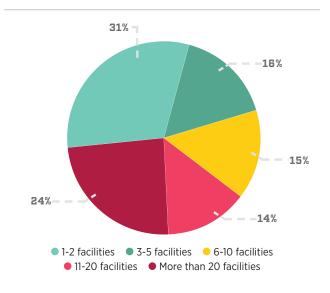


Facility Representation



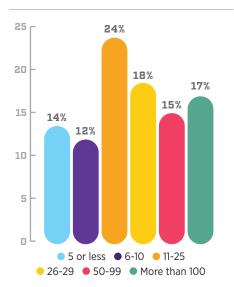
- Education: K-12
- Education: College/University
- Hospitality (hotels, motels, apartment, convention)
- Commercial (office/government buildings)
- Health Care: Hospital/General
- Health Care: Long-term care
- Recreation/Transportation (arenas, stadiums, airports)
- Retail (Shopping centers, casinos, entertainment, churches, museums)
- Industrial (manufacturing, warehouses)

Workload Responsibility



Supervisory Responsibility

(Direct or indirect reports)



Most Important Issues







ealth and Improving facility safety image

űű



Improving productivity/
efficiencies pro

Asset preservation

Top **3** Problem Areas

Restrooms 2. Carpet Entryways/Foyers

Biggest Facility Problem Areas

Restrooms	40%
Carpeted surfaces	20%
Entryways/Foyers	14%
Hard floor surfaces	12%
Multisurface areas	9%
Food service	5%

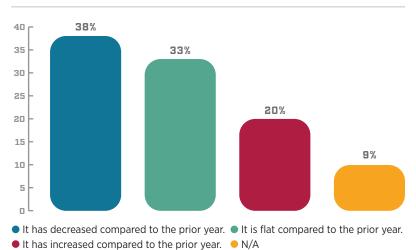
Do You Outsource?

46% did not outsource a portion of their cleaning/janitorial services in the past 12 months

Outsourced/In-House Tasks

Task	In-House	Outsource	NA
Lightbulb replacement/relamping	90%	3%	7 %
Disinfecting services/spraying	87%	11%	2%
Preventive maintenance/building systems	79%	14%	7 %
Restorative/deep cleaning carpet	74%	22%	4%
Stripping/recoating hard floors	73%	19%	8%
Painting	71 %	21%	8%
Matting cleaning/maintenance	70%	22%	8%
Exterior maintenance (sidewalks, parking, etc.)	70%	22%	8%
Building(s) security	65%	24%	11%
Controlled environments/clean rooms	65%	8%	27%
Maintaining HVAC systems	64%	28%	8%
Grounds care	62%	29%	9%
Window cleaning	58%	38%	4%
Laundry operations	55%	26%	19%
Snow removal	54%	21%	25%
Polishing/restoring stone and marble surfaces	50%	22%	28%
Roof maintenance/repair	32%	58%	10%
Bird/pest control	26%	64%	10%
Fire/water damage restoration	22%	62%	16%

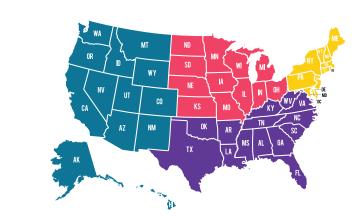
Operating Budget



What % of Operating Budget Is Spent on LABOR?

11% spend More Than 70% 14% spend Less than 30%

Average hourly rate for front-line employees by region



Entry-level

(under one year of employment)

(arrabi array arrab arrap arraba arra
Midwest\$12-13.99
Northeast
• South\$12-13.99

Experienced

(more than one year of employment)

Midwest	\$14-15.99
Northeast	\$16-17.99
South	\$14-15.99

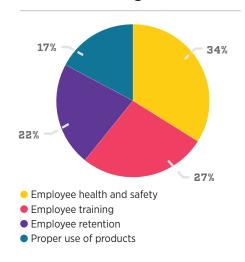
West......\$16-17.99

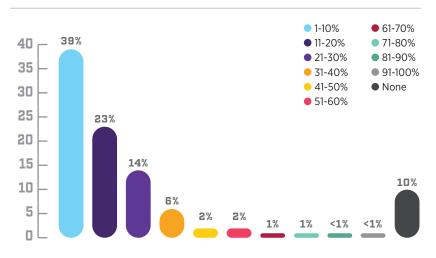
What Facility Managers Purchase

Cleaners and disinfectants	93%
Cleaning supplies (mops, microfiber, carts, can liners)	92%
Hand soap/sanitizers	90%
Paper products (towels, tissue, etc.)	89%
Restroom dispensers (paper, soap)	87 %
Carpet care chemicals	85%
Carpet care equipment (including vacuums)	85%
Employees' safety equipment	84%
Floor pads/supplies	82%
Hard floor care equipment	80%
Floor finish/coatings	80%
Odor control products/chemicals	79%
Batteries (equipment)	77 %
Sprayers/foggers	75%
Matting	69%
Uniforms/apparel	58%
Material handling equipment	56%
Facility signage	53%
Ice and snow removal	44%
Grounds care equipment	40%
Quality assurance programs/ software/tools	39%
Hand dryers	39%
HVAC parts/equipment	38%
Pest/bird control	33%
Measurement equipment (infrared, ATP, IAQ, moisture)	32%

Biggest Concerns with Cleaning Staff

Annual Employee Turnover Rate





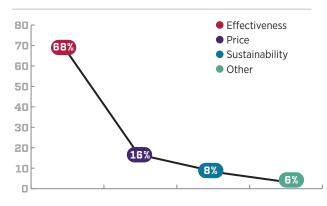
33%

of managers/providers have sole purchasing power over products and equipment used in their facility 17%

have experienced more centralized purchasing processes over the last year, but still have final say 13%

have experienced a decrease in authority over purchasing decisions over the last year

What Drives Value in Product Selection?



Online Purchasing Trends



17% don't purchase cleaning products from online retailers, such as Amazon

13% purchase almost all (90-100%) of their cleaning products online

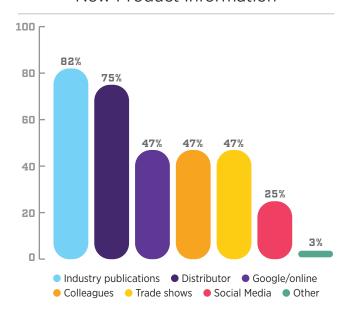
17% don't purchase cleaning products online

Has Your Facility Achieved LEED?

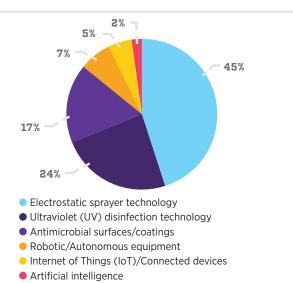


35% Yes

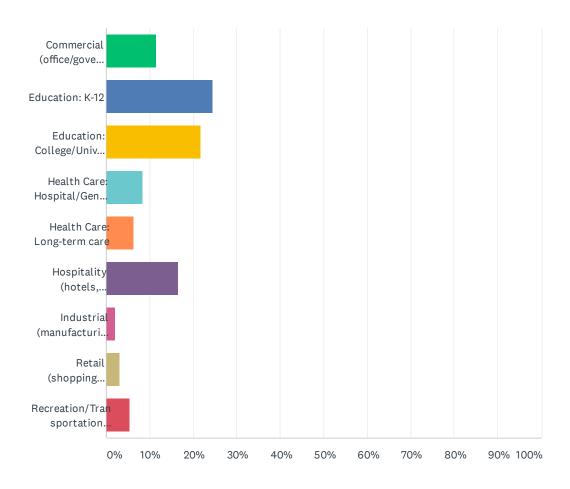
Top Resources for New Product Information



Emerging technologies to adopt in the next 12 months

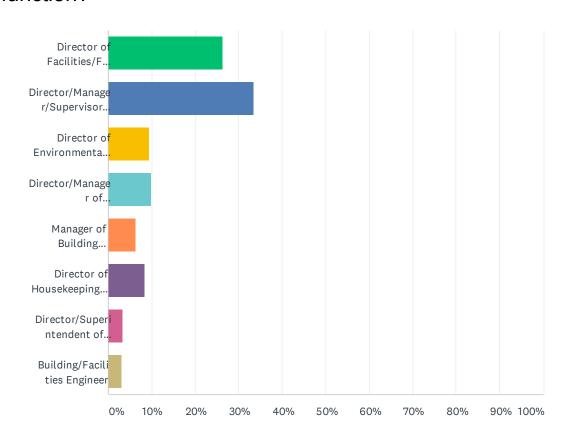


Q1 Which of the following best describes your facility/institution?



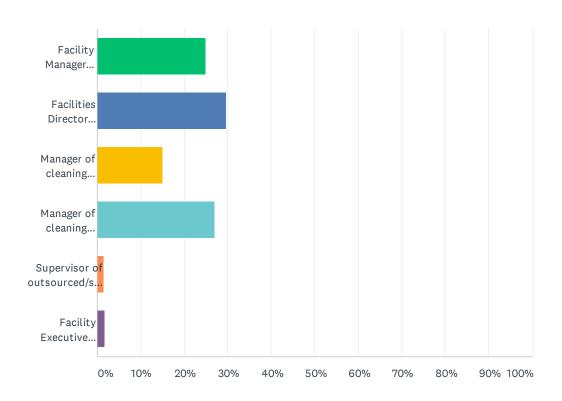
ANSWER CHOICES	RESPONSES
Commercial (office/government buildings)	11.58%
Education: K-12	24.50%
Education: College/University	21.81%
Health Care: Hospital/General	8.39%
Health Care: Long-term care	6.38%
Hospitality (hotels, motels, apartment, convention)	16.61%
Industrial (manufacturing, warehouses)	2.01%
Retail (shopping centers, casinos, entertainment, churches, museums)	3.19%
Recreation/Transportation (arenas, stadiums, airports)	5.54%

Q2 Which of the following best describes your job title/function?



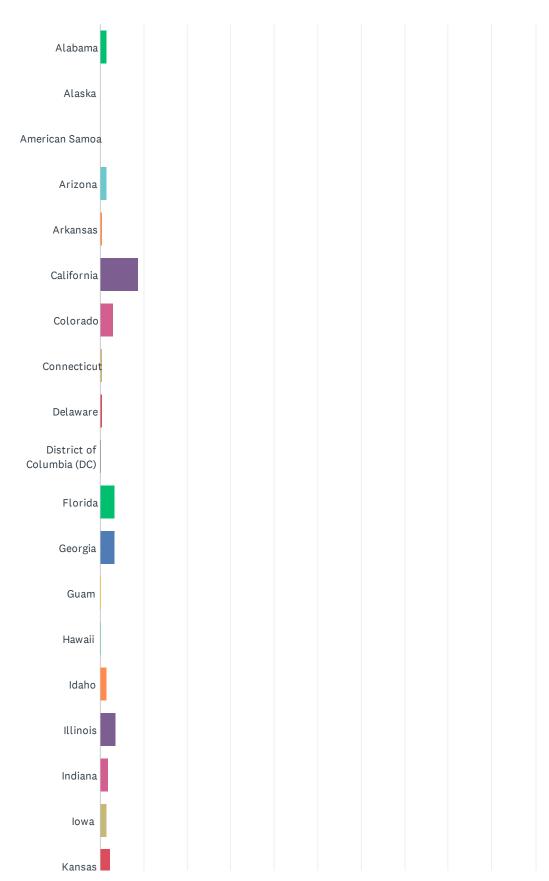
ANSWER CHOICES	RESPONSES
Director of Facilities/Facility Manager	26.34%
Director/Manager/Supervisor of Custodial Services	33.39%
Director of Environmental Services	9.40%
Director/Manager of Maintenance/Operations	9.73%
Manager of Building Services	6.21%
Director of Housekeeping/Executive Housekeeper	8.39%
Director/Superintendent of Buildings & Grounds	3.36%
Building/Facilities Engineer	3.19%

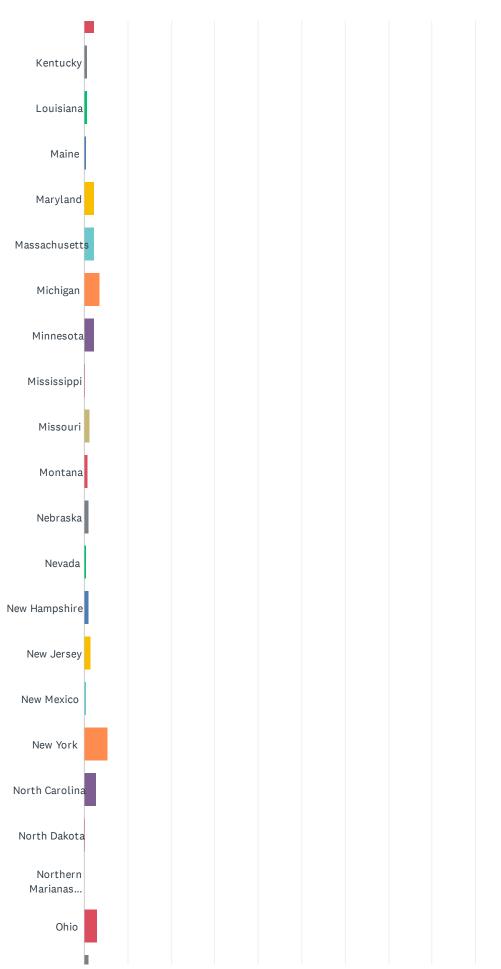
Q3 Which of the following best describes your management responsibilities?



ANSWER CHOICES	RESPONSES
Facility Manager (oversee multiple departments at a single facility, including cleaning/maintenance)	25.00%
Facilities Director (oversee multiple departments at multiple facilities, including cleaning/maintenance)	29.70%
Manager of cleaning services for a single facility	15.10%
Manager of cleaning services for multiple facilities	27.01%
Supervisor of outsourced/subcontract cleaning services	1.51%
Facility Executive (Building Owner)	1.68%

Q4 In what state or region is the facility/are the facilities you manage?







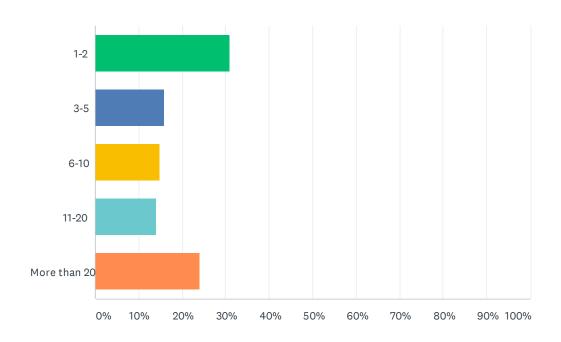
2021 CMM In-House/Facility Management Benchmarking Survey

ANSWER CHOICES	RESPONSES
Alabama	1.36%
Alaska	0.00%
American Samoa	0.00%
Arizona	1.36%
Arkansas	0.51%
California	8.69%
Colorado	2.90%
Connecticut	0.51%
Delaware	0.51%
District of Columbia (DC)	0.17%
Florida	3.41%
Georgia	3.41%
Guam	0.17%
Hawaii	0.17%
Idaho	1.36%
Illinois	3.58%
Indiana	1.87%
Iowa	1.53%
Kansas	2.21%
Kentucky	0.68%
Louisiana	0.68%
Maine	0.51%
Maryland	2.21%
Massachusetts	2.21%
Michigan	3.58%
Minnesota	2.21%
Mississippi	0.17%
Missouri	1.19%
Montana	0.85% 5
Nebraska	1.02%
Nevada	0.51%
New Hampshire	1.02%
@Copyright 2021 ISSA Deprinted with permission from Cleaning & Maintenance Management r	

2021 CMM In-House/Facility Management Benchmarking Survey

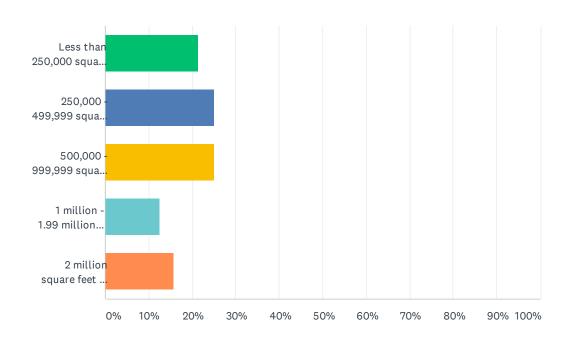
New Jersey	1.53%
New Mexico	0.34%
New York	5.45%
North Carolina	2.73%
North Dakota	0.17%
Northern Marianas Islands	0.00%
Ohio	2.90%
Oklahoma	1.02%
Oregon	1.02%
Pennsylvania	3.07%
Puerto Rico	0.51%
Rhode Island	0.00%
South Carolina	1.53%
South Dakota	0.68%
Tennessee	1.19%
Texas	6.81%
Utah	3.24%
Vermont	1.36%
Virginia	4.43%
Virgin Islands	0.00%
Washington	2.39%
West Virginia	0.68%
Wisconsin	3.75%
Wyoming	0.68%
Canada	1.36%
Outside North America	0.68%
Other (please specify)	1.87%

Q5 How many buildings/facilities are you responsible for cleaning/maintaining?



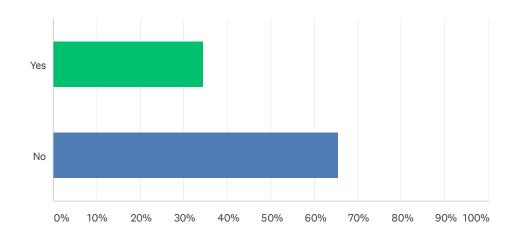
ANSWER CHOICES	RESPONSES
1-2	30.87%
3-5	15.94%
6-10	14.93%
11-20	14.09%
More than 20	24.16%

Q6 What is the total square footage you and/or your department are responsible for cleaning/maintaining?



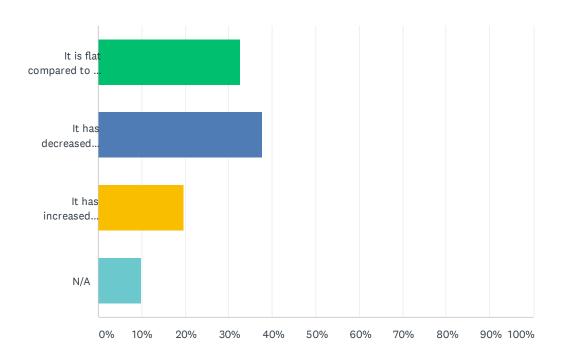
ANSWER CHOICES	RESPONSES
Less than 250,000 square feet	21.31%
250,000 - 499,999 square feet	25.17%
500,000 - 999,999 square feet	25.17%
1 million - 1.99 million square feet	12.58%
2 million square feet or more	15.77%

Q7 Has your facility achieved LEED certification or is currently working toward it?



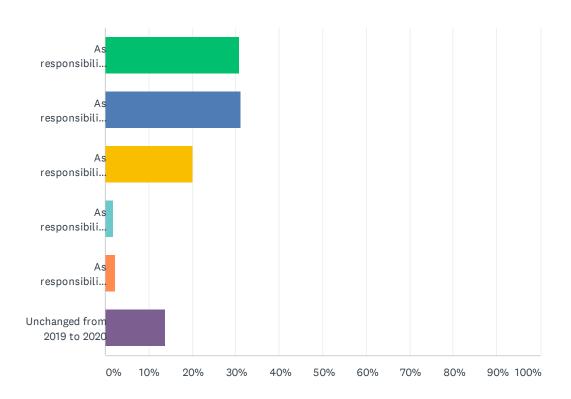
ANSWER CHOICES	RESPONSES
Yes	34.56%
No	65.44%

Q8 Please select one statement that best describes your 2021 operating budget.



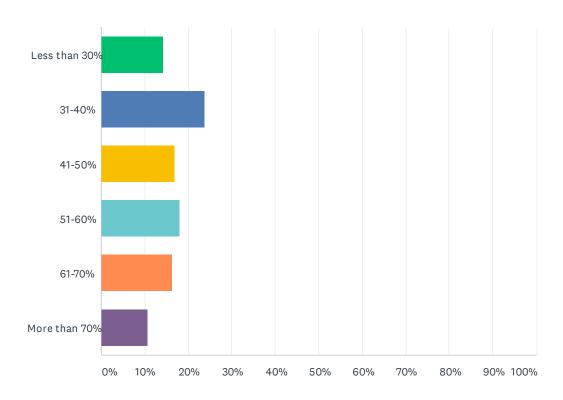
ANSWER CHOICES	RESPONSES
It is flat compared to the prior year.	32.69%
It has decreased compared to the prior year.	37.72%
It has increased compared to the prior year.	19.73%
N/A	9.86%

Q9 Please select one statement that best describes your 2021 operating budget in relation to your responsibilities.



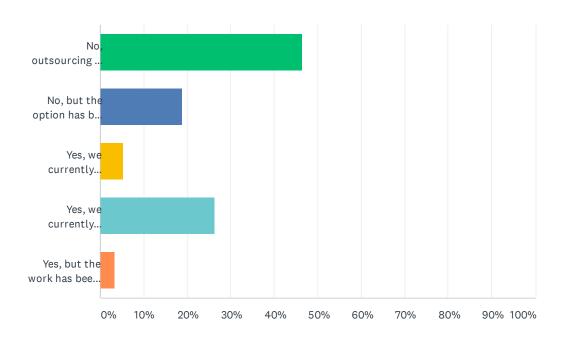
ANSWER CHOICES	RESPONSES
As responsibilities increase, budget increases	30.75%
As responsibilities increase, budget stays flat	31.14%
As responsibilities increase, budget decreases	20.12%
As responsibilities decrease, budget stays flat	1.93%
As responsibilities decrease, budget decreases	2.32%
Unchanged from 2019 to 2020	13.73%

Q10 What percentage of your operating budget is spent on LABOR?



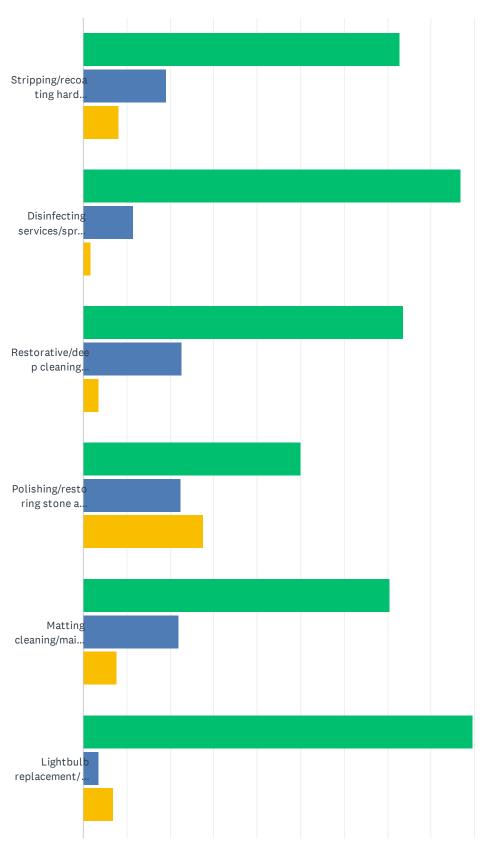
ANSWER CHOICES	RESPONSES
Less than 30%	14.31%
31-40%	23.79%
41-50%	17.02%
51-60%	17.99%
61-70%	16.25%
More than 70%	10.64%

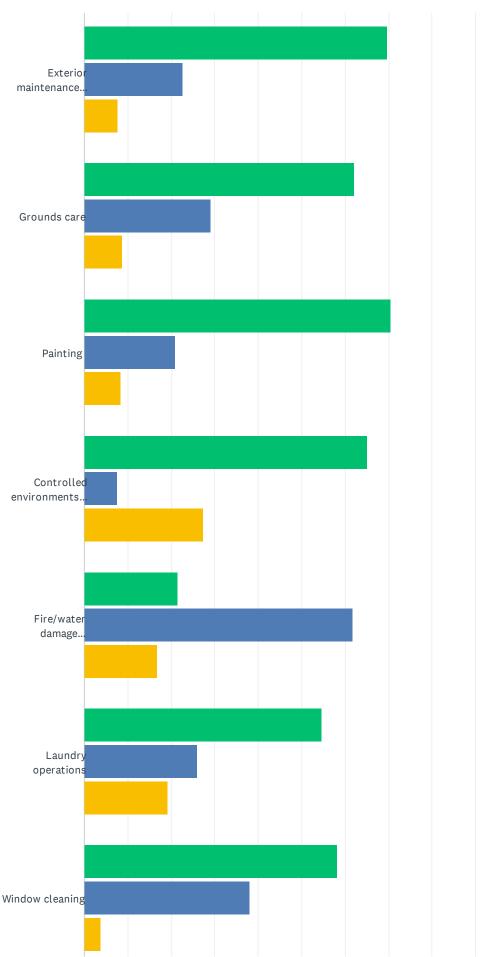
Q11 Has your facility/institution outsourced at least a portion of your cleaning/janitorial services in the past 12 months?

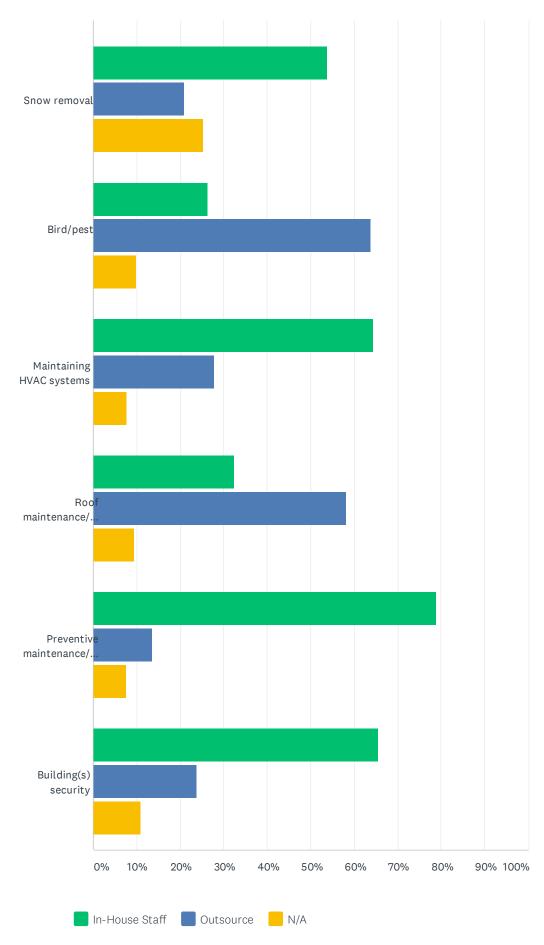


ANSWER CHOICES	RESPONSES
No, outsourcing is not an option.	46.42%
No, but the option has been analyzed/considered.	18.76%
Yes, we currently outsource ALL of our cleaning/maintenance.	5.22%
Yes, we currently outsource a PORTION of our cleaning/maintenance.	26.31%
Yes, but the work has been brought back in house.	3.29%

Q12 For which of the following tasks/responsibilities do you outsource or utilize in-house staff? Please answer each option.



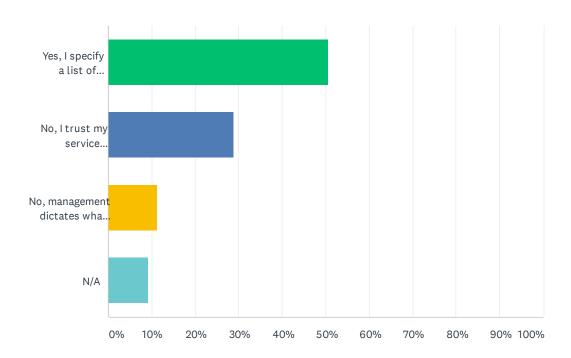




2021 CMM In-House/Facility Management Benchmarking Survey

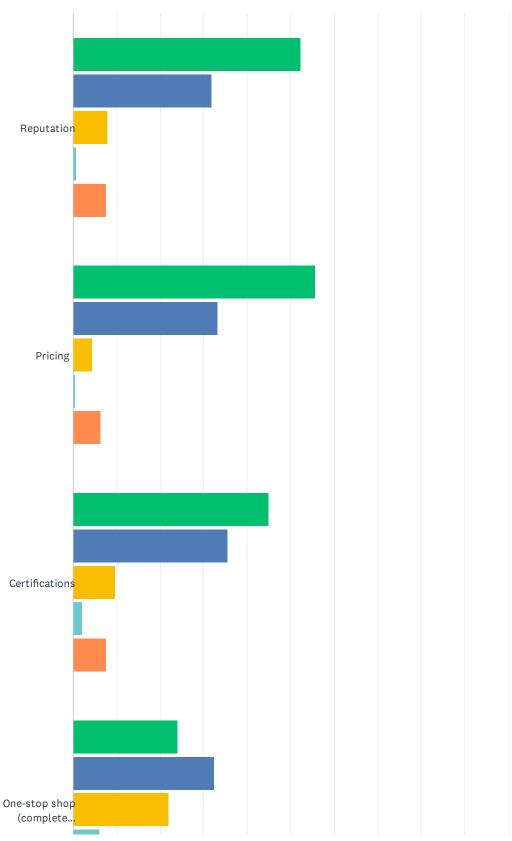
	IN-HOUSE STAFF	OUTSOURCE	N/A	
Stripping/recoating hard floors	72.82% 359	19.07% 94	8.11% 40	
Disinfecting services/spraying	86.90% 431	11.49% 57	1.61% 8	
Restorative/deep cleaning carpets	73.74% 365	22.63% 112	3.64% 18	
Polishing/restoring stone and marble surfaces	50.00% 245	22.45% 110	27.55% 135	
Matting cleaning/maintenance	70.45% 348	21.86% 108	7.69% 38	
Lightbulb replacement/relamping	89.61% 440	3.46% 17	6.92% 34	
Exterior maintenance (sidewalks, parking, etc.)	69.73% 341	22.49% 110	7.77% 38	
Grounds care	62.17% 304	29.04% 142	8.79% 43	
Painting	70.58% 343	20.99% 102	8.44% 41	
Controlled environments/clean rooms	65.04% 320	7.52% 37	27.44% 135	
Fire/water damage restoration	21.63% 106	61.63% 302	16.73% 82	
Laundry operations	54.67% 269	26.02% 128	19.31% 95	
Window cleaning	58.10% 287	38.06% 188	3.85% 19	
Snow removal	53.67% 263	21.02% 103	25.31% 124	
Bird/pest control	26.38% 129	63.80% 312	9.82% 48	
Maintaining HVAC systems	64.34% 314	27.87% 136	7.79% 38	
Roof maintenance/repair	32.44% 158	58.11% 283	9.45% 46	
Preventive maintenance/building systems	78.86% 388	13.62% 67	7.52% 37	
Building(s) security	65.38% 321	23.83% 117	10.79% 53	

Q13 When outsourcing services, do you have input on the specific products and equipment that will be used within your facility?

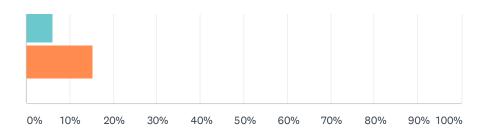


ANSWER CHOICES	RESPONSES
Yes, I specify a list of specific brands and products to be used in my facility(s).	50.64%
No, I trust my service provider to utilize appropriate equipment and supplies.	28.85%
No, management dictates what products/brands are used in my facility(s).	11.32%
N/A	9.19%

Q14 To what extent are the following criteria important when selecting an outsourced service provider? Please answer each option.



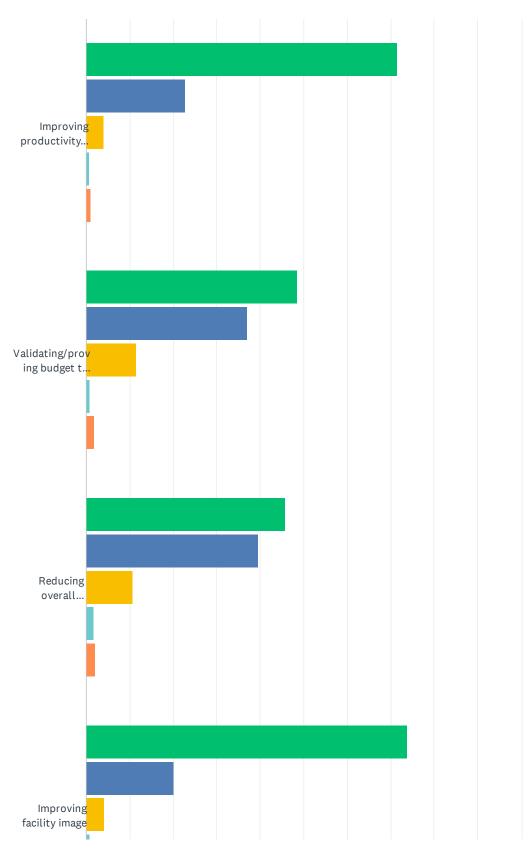
2021 CMM In-House/Facility Management Benchmarking Survey

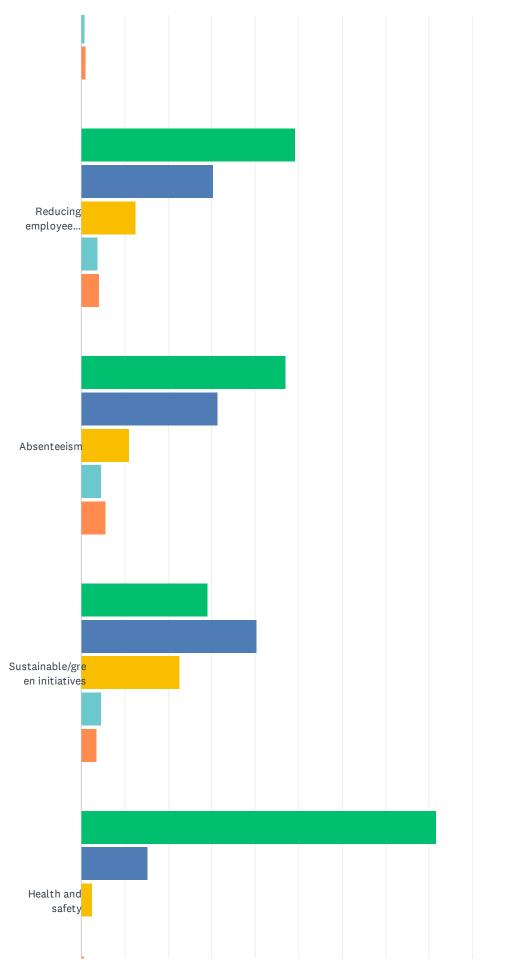


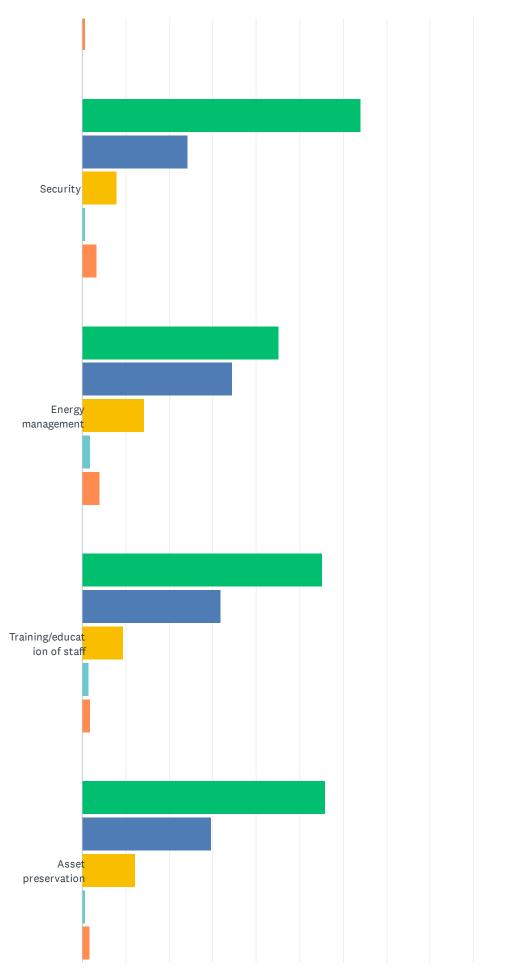


	TO A LARGE EXTENT	TO A MODERATE EXTENT	TO A SMALL EXTENT	TO NO EXTENT	DOES NOT APPLY	WEIGHTED AVERAGE
Reputation	52.30% 239	31.73% 145	7.88% 36	0.66%	7.44% 34	1.79
Pricing	55.56% 255	33.33% 153	4.36% 20	0.44%	6.32% 29	1.69
Certifications	45.08% 206	35.67% 163	9.63% 44	2.19% 10	7.44% 34	1.91
One-stop shop (complete integrated facility services)	24.12% 110	32.46% 148	21.93% 100	6.14% 28	15.35% 70	2.56

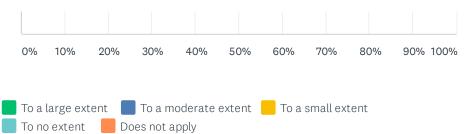
Q15 To what extent are the following issues important in your facility/operation? Please answer each option.





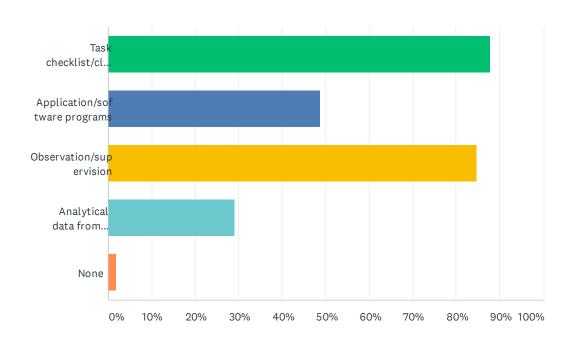


2021 CMM In-House/Facility Management Benchmarking Survey



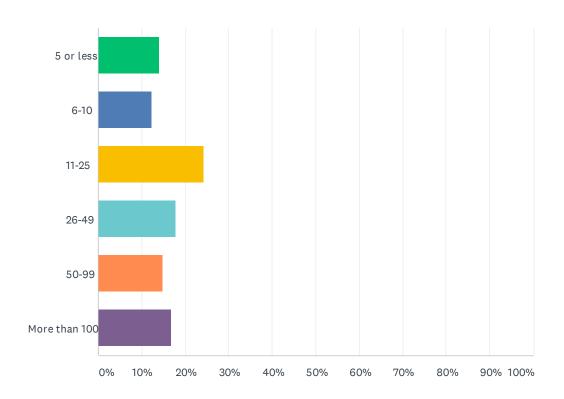
	TO A LARGE EXTENT	TO A MODERATE EXTENT	TO A SMALL EXTENT	TO NO EXTENT	DOES NOT APPLY	
Improving productivity/efficiencies	71.46% 328	22.88% 105	3.92% 18	0.65% 3	1.09% 5	
Validating/proving budget to management	48.58% 223	37.04% 170	11.55% 53	0.87%	1.96%	
Reducing overall cleaning/maintenance costs	45.87% 211	39.57% 182	10.65% 49	1.74% 8	2.17% 10	
Improving facility image	73.75% 340	20.17% 93	4.12% 19	0.87%	1.08% 5	
Reducing employee turnover	49.13% 226	30.43% 140	12.61% 58	3.70% 17	4.13% 19	
Absenteeism	47.16% 216	31.44% 144	11.14% 51	4.59% 21	5.68% 26	
Sustainable/green initiatives	28.98% 133	40.31% 185	22.66% 104	4.58% 21	3.49% 16	
Health and safety	81.52% 375	15.22% 70	2.61% 12	0.00%	0.65%	
Security	63.96% 291	24.18% 110	7.91% 36	0.66%	3.30% 15	
Energy management	45.27% 206	34.51% 157	14.29% 65	1.98%	3.96% 18	
Training/education of staff	55.31% 255	31.89% 147	9.33% 43	1.52% 7	1.95% 9	
Asset preservation	55.80% 255	29.76% 136	12.04% 55	0.66%	1.75% 8	

Q16 What type of quality assurances do you use in your facility(s)? Check all that apply.



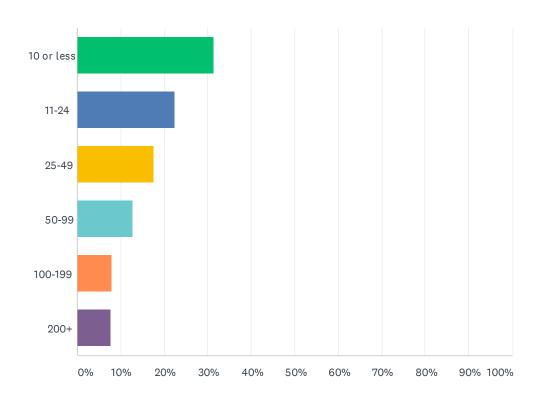
ANSWER CHOICES	RESPONSES
Task checklist/cleaning schedule	87.82%
Application/software programs	48.72%
Observation/supervision	84.83%
Analytical data from equipment (usage and/or performance data)	29.06%
None	1.92%

Q17 How many staff are you responsible for/do you supervise (directly or indirectly)?



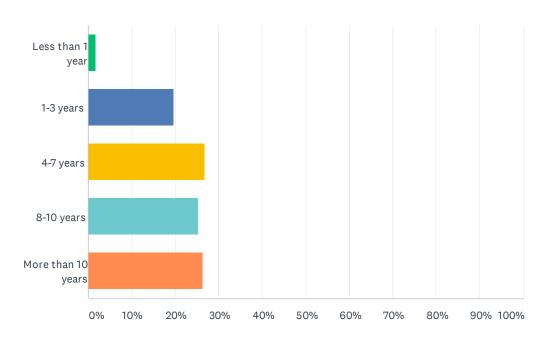
ANSWER CHOICES	RESPONSES
5 or less	14.10%
6-10	12.36%
11-25	24.30%
26-49	17.79%
50-99	14.75%
More than 100	16.70%

Q18 How many full-time equivalent (FTE) employees work in your cleaning/maintenance department?



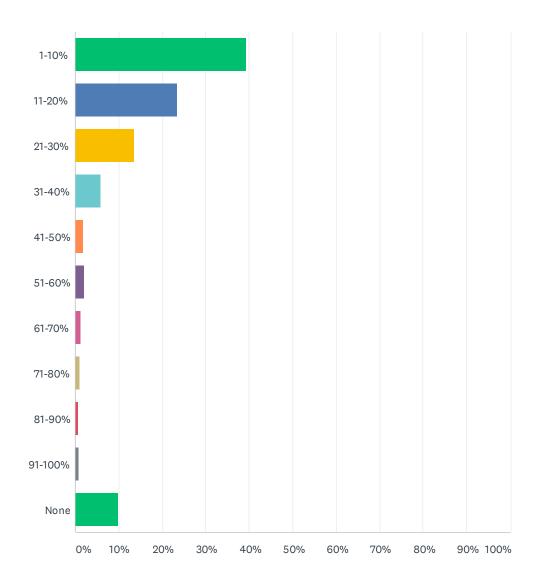
ANSWER CHOICES	RESPONSES
10 or less	31.45%
11-24	22.34%
25-49	17.57%
50-99	12.80%
100-199	8.03%
200+	7.81%

Q19 What is the average tenure of your cleaning/maintenance staff?



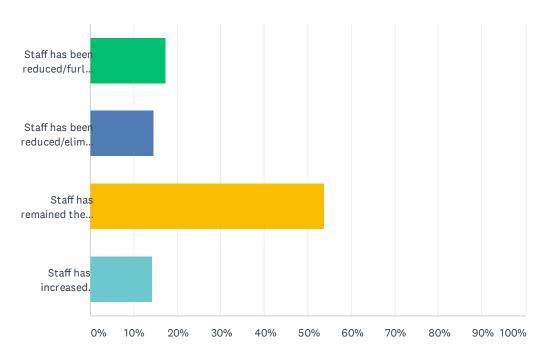
ANSWER CHOICES	RESPONSES
Less than 1 year	1.74%
1-3 years	19.74%
4-7 years	26.68%
8-10 years	25.38%
More than 10 years	26.46%

Q20 What is your ANNUAL employee turnover rate? To calculate, take the total number of employee separations and divide by the average number you employ monthly. Example: 25 employee separations / 125 average monthly employees = 20%.

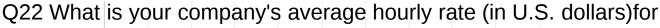


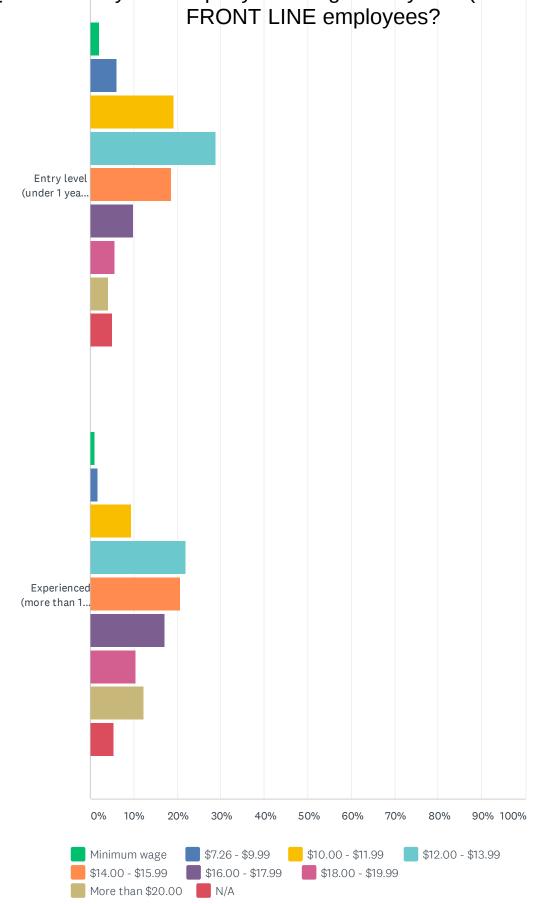
ANSWER CHOICES	RESPONSES
1-10%	39.26%
11-20%	23.43%
21-30%	13.67%
31-40%	5.86%
41-50%	1.95%
51-60%	2.17%
61-70%	1.30%
71-80%	1.08%
81-90%	0.65%
91-100%	0.87%
None	9.76%

Q21 How has your staffing changed in regard to the COVID-19 pandemic?



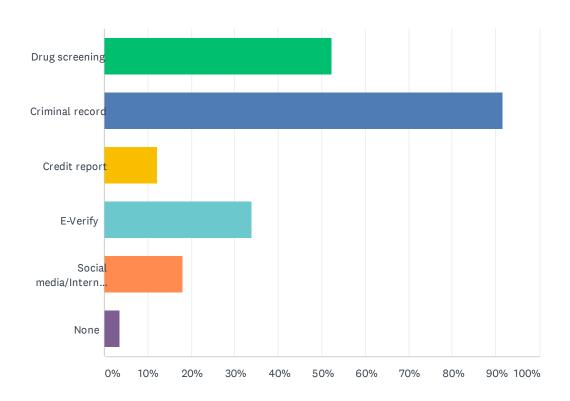
ANSWER CHOICES	RESPONSES
Staff has been reduced/furloughed, but plan to bring staff back to pre-pandemic level.	17.47%
Staff has been reduced/eliminated.	14.63%
Staff has remained the same.	53.71%
Staff has increased.	14.19%





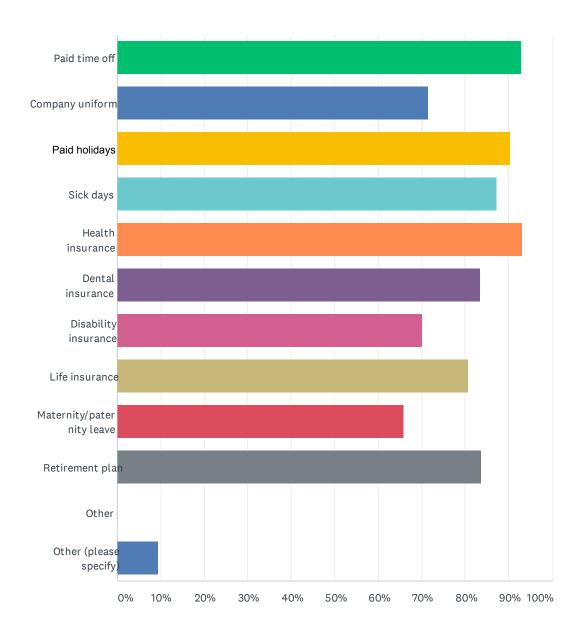
	MINIMUM WAGE	\$7.26 - \$9.99	\$10.00 - \$11.99	\$12.00 - \$13.99	\$14.00 - \$15.99	\$16.00 - \$17.99	\$18.00 - \$19.99	MORE THAN \$20.00	N/A	
Entry level (under 1 year of employment)	2.19% 10	6.14% 28	19.30% 88	28.95% 132	18.64% 85	9.87% 45	5.70% 26	4.17% 19	5.04% 23	
Experienced (more than 1 year of employment)	1.14%	1.59% 7	9.34% 41	21.87% 96	20.73% 91	17.08% 75	10.48% 46	12.30% 54	5.47% 24	

Q23 What background checks do you use during the hiring process? Check all that apply.



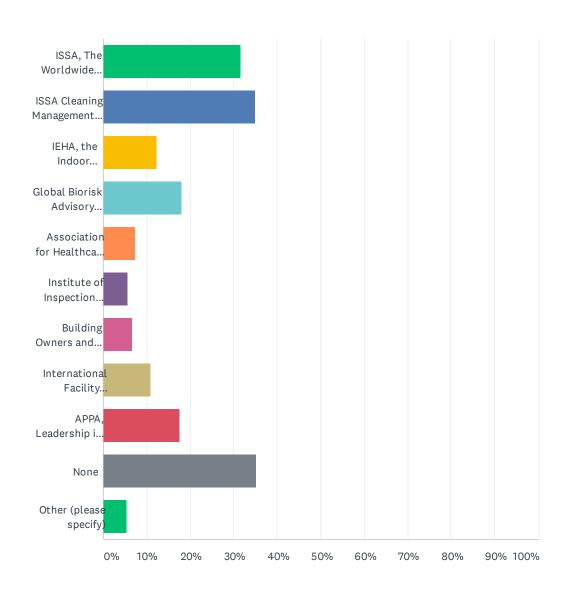
ANSWER CHOICES	RESPONSES
Drug screening	52.20%
Criminal record	91.63%
Credit report	12.11%
E-Verify	33.92%
Social media/Internet search	18.06%
None	3.52%

Q24 Which of the following benefits do you provide your full-time employees? Check all that apply.



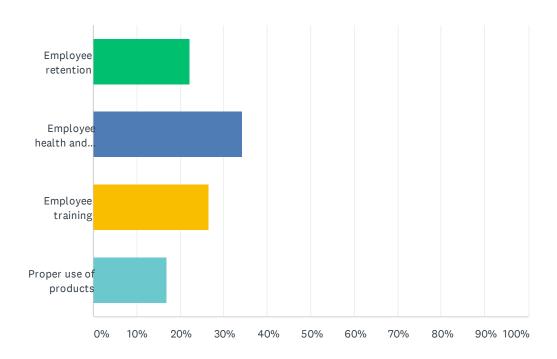
ANSWER CHOICES	RESPONSES
Paid time off	92.95%
Company uniform	71.59%
Paid holidays	90.31%
Sick days	87.22%
Health insurance	93.17%
Dental insurance	83.48%
Disability insurance	70.04%
Life insurance	80.84%
Maternity/paternity leave	65.86%
Retirement plan	83.70%
Other	0.00%
Other (please specify)	9.47%

Q25 Which of the following certification/credential providers do you utilize? Check all that apply.



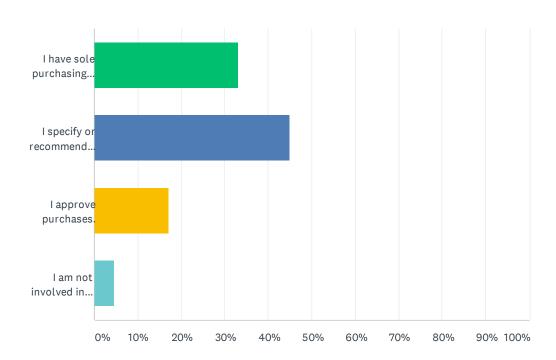
ANSWER CHOICES	RESPONSES
ISSA, The Worldwide Cleaning Industry Association	31.50%
ISSA Cleaning Management Institute (CMI)	35.02%
IEHA, the Indoor Environmental Healthcare and Hospitality Association, A Division of ISSA	12.33%
Global Biorisk Advisory Council, A Division of ISSA	18.06%
Association for Healthcare Environment (AHE)	7.27%
Institute of Inspection Cleaning and Restoration Certification (IICRC)	5.73%
Building Owners and Managers Association (BOMA)	6.61%
International Facility Management Association (IFMA)	10.79%
APPA, Leadership in Educational Facilities	17.62%
None	35.24%
Other (please specify)	5.51%

Q26 What is your biggest concern with your cleaning staff?



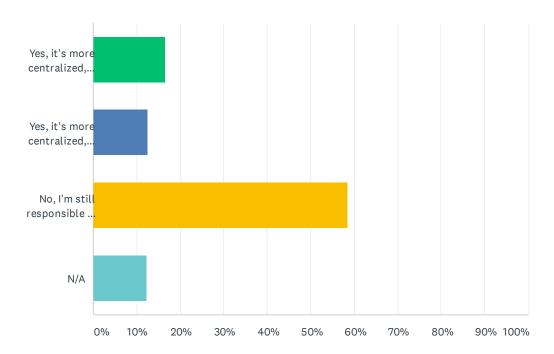
ANSWER CHOICES	RESPONSES
Employee retention	22.17%
Employee health and safety	34.37%
Employee training	26.61%
Proper use of products	16.85%

Q27 Which of the following describes your role in the purchasing of equipment and supplies?



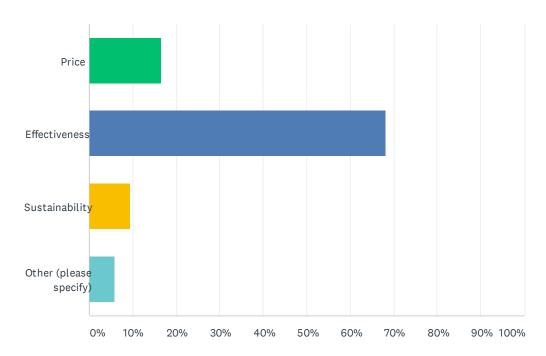
ANSWER CHOICES	RESPONSES
I have sole purchasing authority.	33.11%
I specify or recommend purchases.	44.97%
I approve purchases.	17.23%
I am not involved in purchasing of equipment and supplies.	4.70%

Q28 Has your purchasing process changed in the last 12 months?



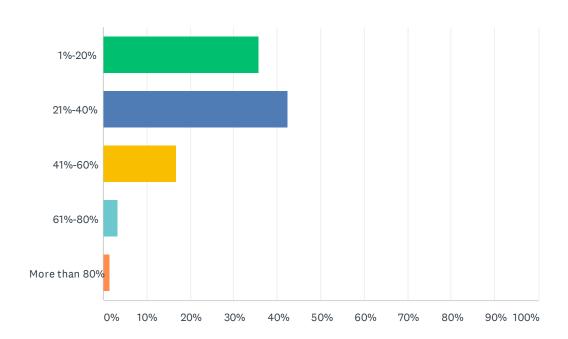
ANSWER CHOICES	RESPONSES
Yes, it's more centralized, but I still have final say.	16.55%
Yes, it's more centralized, and my authority has decreased.	12.53%
No, I'm still responsible for my budget.	58.61%
N/A	12.30%

Q29 What is most valuable to your organization when choosing a product?



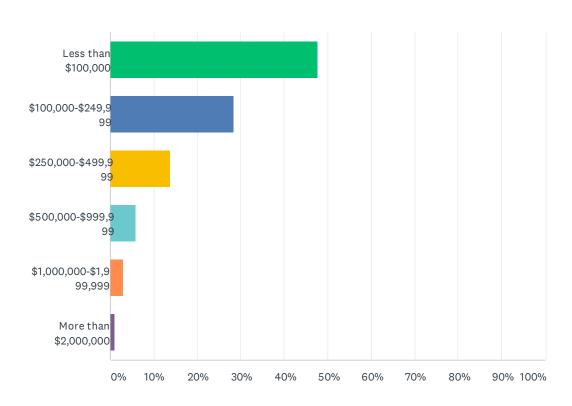
ANSWER CHOICES	RESPONSES
Price	16.55%
Effectiveness	68.23%
Sustainability	9.40%
Other (please specify)	5.82%

Q30 What percentage of your operating budget is spent on cleaning/maintenance equipment and supplies (purchase and maintenance)?



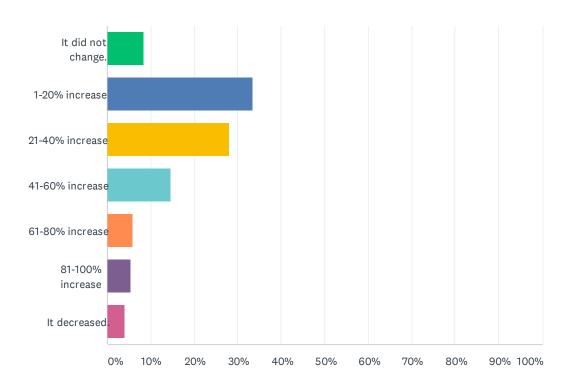
ANSWER CHOICES	RESPONSES
1%-20%	35.79%
21%-40%	42.51%
41%-60%	16.78%
61%-80%	3.36%
More than 80%	1.57%

Q31 How much do you spend annually on cleaning/maintenance equipment and supplies (including purchase price and maintenance costs)?



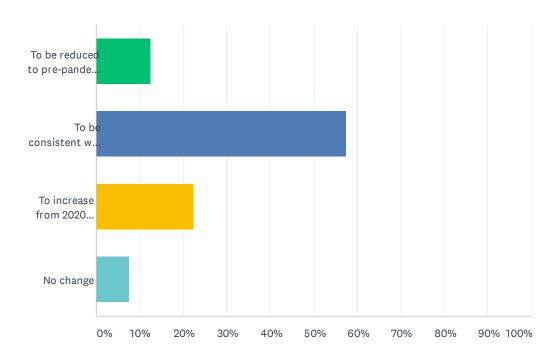
ANSWER CHOICES	RESPONSES
Less than \$100,000	47.61%
\$100,000-\$249,999	28.47%
\$250,000-\$499,999	13.90%
\$500,000-\$999,999	5.92%
\$1,000,000-\$1,999,999	2.96%
More than \$2,000,000	1.14%

Q32 How did your purchasing of disinfecting chemicals and equipment change in 2020 versus 2019?



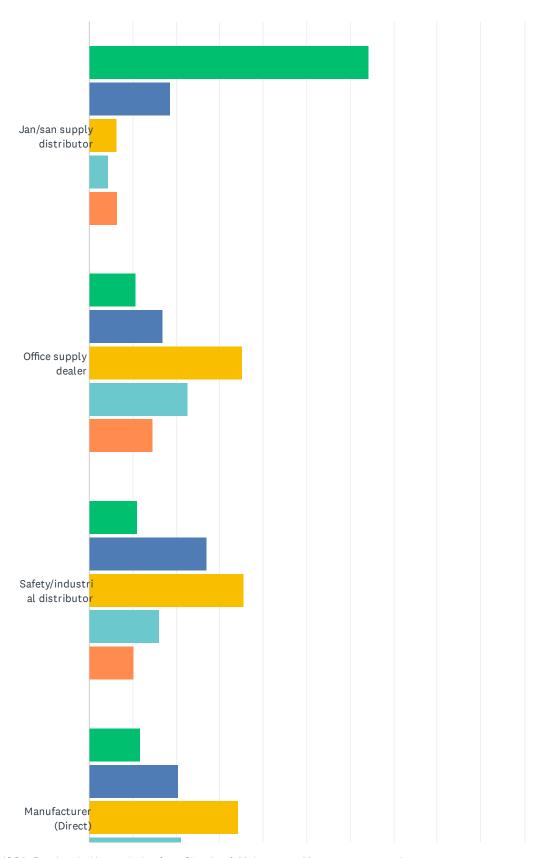
ANSWER CHOICES	RESPONSES
It did not change.	8.45%
1-20% increase	33.56%
21-40% increase	28.08%
41-60% increase	14.61%
61-80% increase	5.94%
81-100% increase	5.48%
It decreased.	3.88%

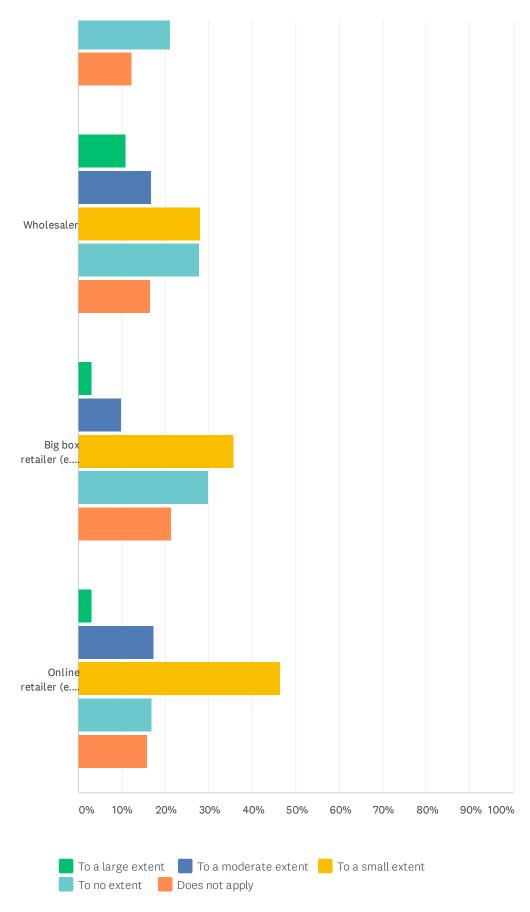
Q33 How do you expect your purchasing of disinfecting chemicals and equipment to change in 2021?



ANSWER CHOICES	RESPONSES
To be reduced to pre-pandemic levels	12.56%
To be consistent with 2020 levels	57.53%
To increase from 2020 levels	22.37%
No change	7.53%

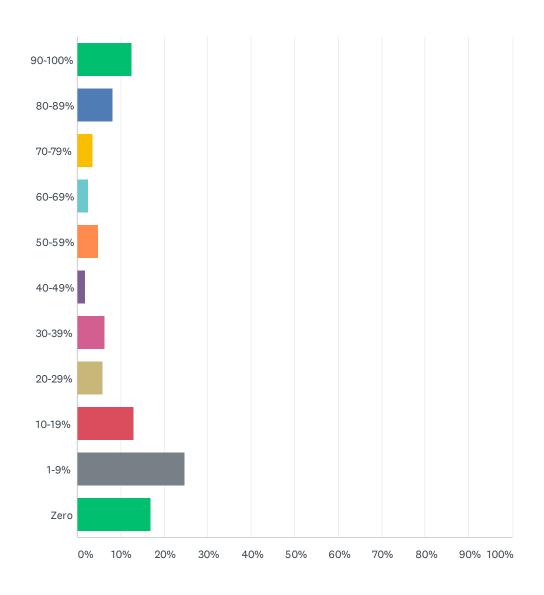
Q34 To what extent do you purchase cleaning/maintenance products from the following sources?





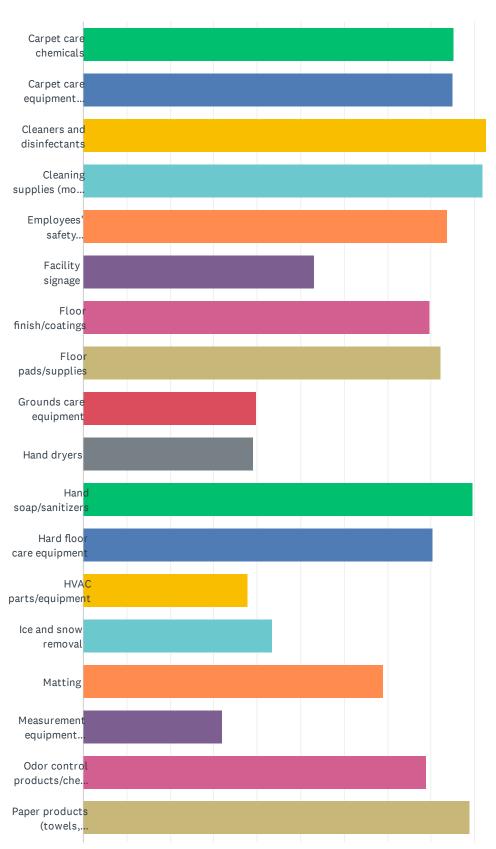
	TO A LARGE EXTENT	TO A MODERATE EXTENT	TO A SMALL EXTENT	TO NO EXTENT	DOES NOT APPLY	TOTAL	WEIGHTED AVERAGE
Jan/san supply distributor	64.16% 265	18.64% 77	6.30% 26	4.36% 18	6.54% 27	413	1.70
Office supply dealer	10.70% 43	16.92% 68	35.07% 141	22.64% 91	14.68% 59	402	3.14
Safety/industrial distributor	11.17% 45	27.05% 109	35.48% 143	16.13% 65	10.17% 41	403	2.87
Manufacturer (Direct)	11.66% 47	20.60% 83	34.24% 138	21.09% 85	12.41% 50	403	3.02
Wholesaler	10.94% 43	16.79% 66	27.99% 110	27.74% 109	16.54% 65	393	3.22
Big box retailer (e.g, Costco)	3.05% 12	9.90%	35.79% 141	29.95% 118	21.32% 84	394	3.57
Online retailer (e.g., Amazon)	3.24% 13	17.46% 70	46.38% 186	16.96% 68	15.96% 64	401	3.25

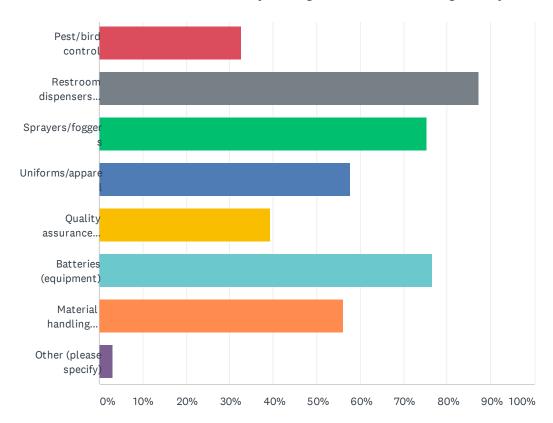
Q35 What percentage of your cleaning/maintenance products do you purchase ONLINE?



ANSWER CHOICES	RESPONSES
90-100%	12.50%
80-89%	8.10%
70-79%	3.47%
60-69%	2.55%
50-59%	4.86%
40-49%	1.85%
30-39%	6.25%
20-29%	5.79%
10-19%	12.96%
1-9%	24.77%
Zero	16.90%

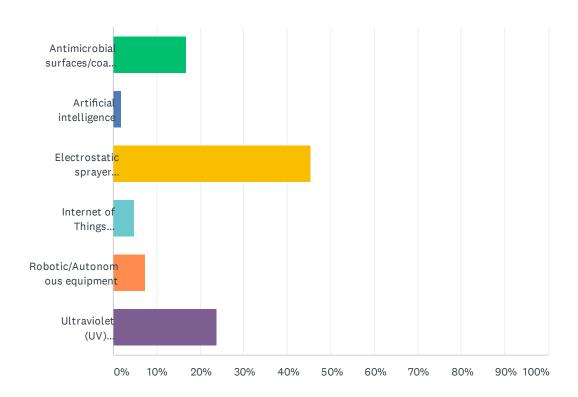
Q36 Which of the following products are you responsible for purchasing in your facility(s)? Check all that apply.





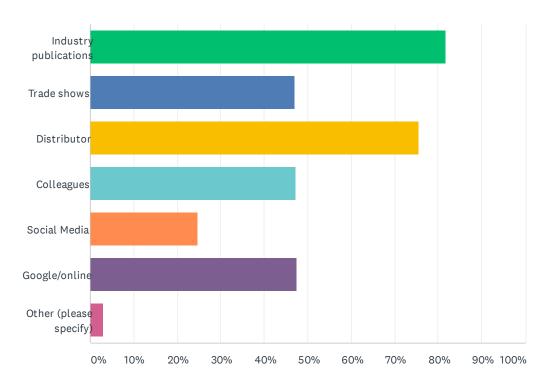
ANSWER CHOICES	RESPONSES
Carpet care chemicals	85.07%
Carpet care equipment (including vacuums)	84.83%
Cleaners and disinfectants	92.65%
Cleaning supplies (mops, microfiber, carts, can liners)	91.94%
Employees' safety equipment	83.65%
Facility signage	53.08%
Floor finish/coatings	79.62%
Floor pads/supplies	82.23%
Grounds care equipment	39.81%
Hand dryers	39.10%
Hand soap/sanitizers	89.57%
Hard floor care equipment	80.33%
HVAC parts/equipment	37.91%
Ice and snow removal	43.60%
Matting	68.96%
Measurement equipment (infrared, ATP, IAQ, moisture)	31.99%
Odor control products/chemicals	78.91%
Paper products (towels, tissue, etc.)	88.86%
Pest/bird control	32.70%
Restroom dispensers (paper, soap)	87.20%
Sprayers/foggers	75.36%
Uniforms/apparel	57.82%
Quality assurance programs/software/tools	39.34%
Batteries (equipment)	76.54%
Material handling equipment	56.16%
Other (please specify)	3.08%

Q37 Which of the following emerging technologies/products does your facility plan to purchase/implement in the next 12 months? Check all that apply.



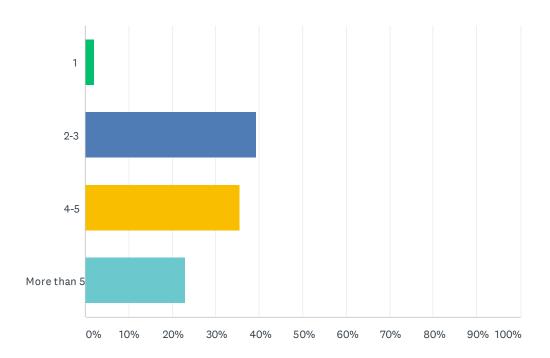
ANSWER CHOICES	RESPONSES
Antimicrobial surfaces/coatings	16.77%
Artificial intelligence	1.83%
Electrostatic sprayer technology	45.43%
Internet of Things (IoT)/Connected devices	4.88%
Robotic/Autonomous equipment	7.32%
Ultraviolet (UV) disinfection technology	23.78%

Q38 Where do you learn about new products? Select all that apply.



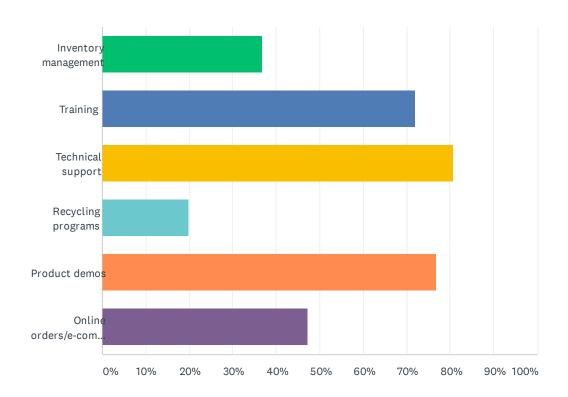
ANSWER CHOICES	RESPONSES
Industry publications	81.71%
Trade shows	46.99%
Distributor	75.46%
Colleagues	47.22%
Social Media	24.77%
Google/online	47.45%
Other (please specify)	3.01%

Q39 Approximately how many different vendors do you currently purchase facility supplies from?



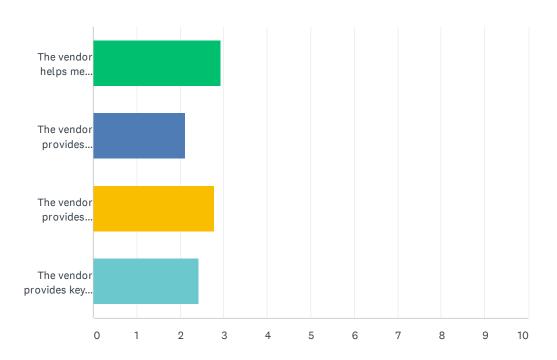
ANSWER CHOICES	RESPONSES
1	2.08%
2-3	39.35%
4-5	35.65%
More than 5	22.92%

Q40 Which of the following do you expect from your distributor/vendor? Check all that apply.



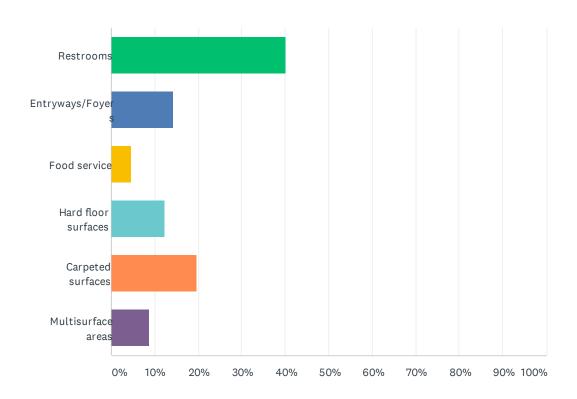
ANSWER CHOICES	RESPONSES
Inventory management	36.81%
Training	71.99%
Technical support	80.79%
Recycling programs	19.91%
Product demos	76.85%
Online orders/e-commerce	47.22%

Q41 When selecting a vendor, rank the following factors in order of importance from 1 to 4 with 1 being the most important.



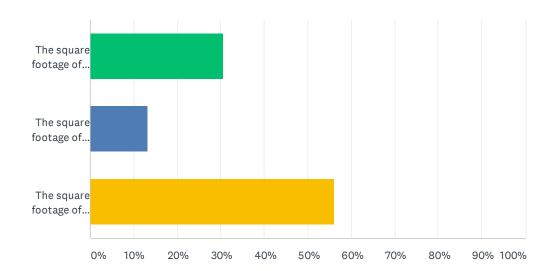
	1	2	3	4	SCORE
The vendor helps me improve my facility image with the right supplies.	48.41% 167	15.65% 54	15.07% 52	20.87% 72	2.92
The vendor provides leadership on health and safety issues.	12.22% 44	21.39% 77	31.94% 115	34.44% 124	2.11
The vendor provides insights and tools to improve productivity/efficiency.	28.81% 104	32.41% 117	26.32% 95	12.47% 45	2.78
The vendor provides key training and education.	19.42% 80	30.58% 126	23.54% 97	26.46% 109	2.43

Q42 Which of the following areas/surfaces is the most problematic in cleaning/maintaining your facility?



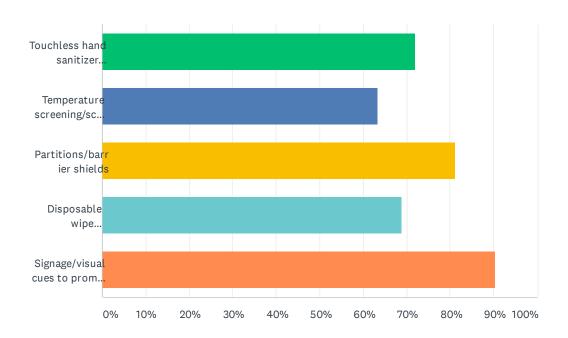
ANSWER CHOICES	RESPONSES
Restrooms	40.14%
Entryways/Foyers	14.32%
Food service	4.69%
Hard floor surfaces	12.44%
Carpeted surfaces	19.72%
Multisurface areas	8.69%

Q43 During the global pandemic, how has the cleanable area/square footage in your facility changed?



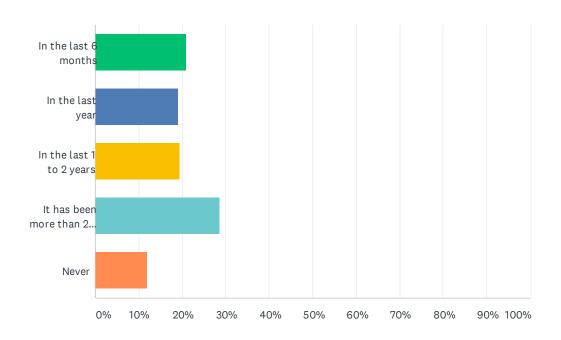
ANSWER CHOICES	RESPONSES
The square footage of space we clean has increased.	30.57%
The square footage of space we clean has decreased.	13.27%
The square footage of space has remained the same.	56.16%

Q44 What new health and safety measures have you implemented in your facility during the past 12 months due to the COVID-19 pandemic? Check all that apply.



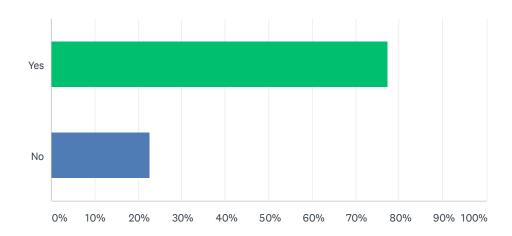
ANSWER CHOICES	RESPONSES
Touchless hand sanitizer stations	72.07%
Temperature screening/scanners	63.38%
Partitions/barrier shields	81.22%
Disposable wipe dispensers/stations	68.78%
Signage/visual cues to promote hand hygiene, social distancing	90.38%

Q45 With touchless products now in greater demand, when have you last upgraded your restroom dispensers?



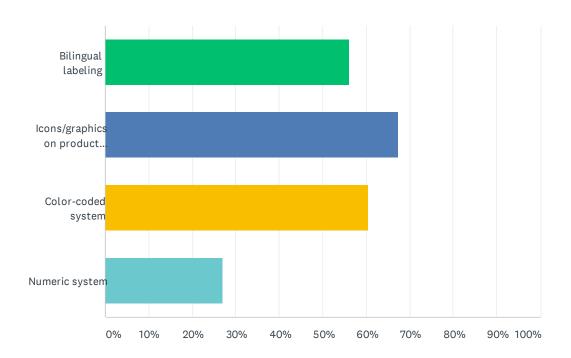
ANSWER CHOICES	RESPONSES
In the last 6 months	20.89%
In the last year	19.01%
In the last 1 to 2 years	19.48%
It has been more than 2 years	28.64%
Never	11.97%

Q46 Do you find that cleaning solutions and equipment manufacturer labels are easy to understand by your custodial staff?



ANSWER CHOICES	RESPONSES
Yes	77.46%
No	22.54%

Q47 If you answered NO to Q46, what could manufacturers do to improve labels and packaging for your custodial staff? Check all that apply.

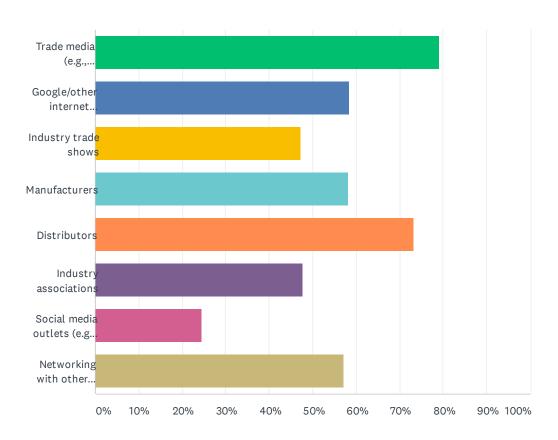


ANSWER CHOICES	RESPONSES
Bilingual labeling	55.97%
Icons/graphics on product usage	67.30%
Color-coded system	60.38%
Numeric system	27.04%

Q48 What do you think is the most critical issue facing the cleaning/facility management industry today?

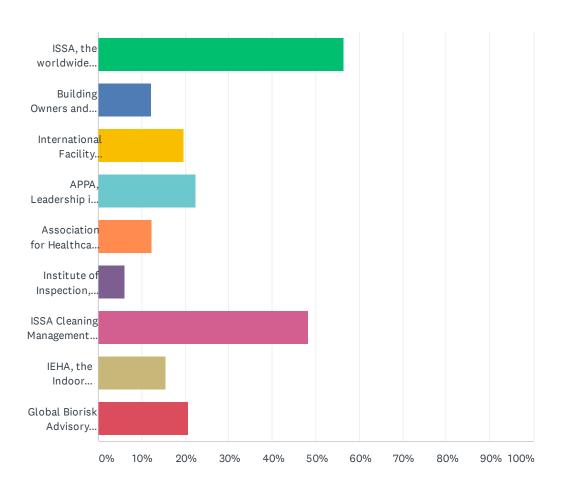
Disinfection Employee health safety needed Finding good image Salaries Making sure surfaces Sanitizing availability help standards COVID-19 high pandemic motivated chemicals building cleaning disinfecting Follow Maintaining Low Safe cleaning sanitizing Safety ensure changing education products procedures time use disinfecting staff retention Covid pay cleaning wages Staff Retaining training health safety Keeping people employees policies facilities supply Increased perform retention Proper training new consistency finding protocols public Technology enough Lack proper constant budget Customers labor environment level expectations Cost pricing workers building occupants ability areas

Q49 What resources do you use to learn more about the cleaning/facility management industry? Check all that apply.



ANSWER CHOICES	RESPONSES
Trade media (e.g., magazines, websites, e-newsletters)	79.11%
Google/other internet sources	58.45%
Industry trade shows	47.18%
Manufacturers	58.22%
Distributors	73.24%
Industry associations	47.65%
Social media outlets (e.g., LinkedIn, Twitter, Facebook, YouTube)	24.41%
Networking with other industry professionals	57.04%

Q50 Which of the following organizations are you/your facility affiliated with? Check all that apply.



ANSWER CHOICES	RESPONSES
ISSA, the worldwide cleaning industry association	56.57%
Building Owners and Managers Association (BOMA)	12.21%
International Facility Management Association (IFMA)	19.72%
APPA, Leadership in Educational Facilities	22.30%
Association for Healthcare Environments (AHE)	12.44%
Institute of Inspection, Cleaning and Restoration Certification (IICRC)	6.10%
ISSA Cleaning Management Institute (CMI)	48.36%
IEHA, the Indoor Environmental Healthcare and Hospitality Association, A Division of ISSA	15.49%
Global Biorisk Advisory Council, a Division of ISSA	20.66%