

# **THE U.S. COMMERCIAL & RESIDENTIAL CLEANING SERVICES INDUSTRY**

(9<sup>th</sup> Edition – June 2012)

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- \* Discussion of impact of **alternative floor coverings**, impact on carpet sales/usage
- \* 2010 carpet cleaning truckmount survey results (ICS Cleaning Specialist magazine)
- \* Historical size of the industry: Marketdata estimates of true size of the segment (1987-2011)
- \* Discussion of how market potential derived, avg. annual sales per service, forecast and outlook for the sector, effect of recessions/gas prices/housing starts, other indicators.
- \* Estimates of **commercial/residential/disaster recovery segments**, \$ values (2004, 2008)
- \* Industry outlooks by: SEARS Carpet Cleaning, Heaven's Best, other consultants.
- \* Franchising: analysis of no. of outlets, start-up costs, the top 6 carpet cleaning franchisers, estd. systemwide revenues (2007-2011), franchises by no. of units,
- \* Carpet cleaner contractor operating ratios: highlights of 2010 Contract Cleaner CMM Magazine survey (revenues, avg. fees, methods, etc.), 1992-2007 Census... no. of estabs., receipts, avg. receipts per estab., sources of receipts, multi-unit firms, legal form of firm, top 50 mkt. share, source of receipts.

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- \* Summary: nature & estd. \$ sales per franchise vs. commercial cleaning services, list of top franchise companies in the business, franchises vs. independent maids, reasons for demand and effects of the recession, 2008-2016F \$ mkt. size.
- \* End-user household demographics: findings of Mediamark Research survey: major target age groups and usage of professional cleaning services
- \* How maid services operate, fees charged, bonding, pay methods, immigrants, etc.
- \* Market size estimates, by trade group ARSCI, competitors, Marketdata
- \* Merry Maids revenues, by co.-owned vs. franchised units: 2008-2011
- \* List of residential cleaning services franchises: (The Maids Intl., Maid Brigade; Merry Maids, Molly Maid, Cottage Care, Swisher Maids, Mini Maid, Home Cleaning Centers of America) - addresses.

### Tables:

- Projected no. of U.S. households using a maid or housekeep, by age group
- Residential cleaning franchises: start-up costs, franchise fee, royalty rates
- Number of maid services franchises: 2008-2011
- Franchise fees, total start-up costs, royalty rates, by company

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- \* Explanation of how to interpret Census data, how the data is arranged/classified by NAICS codes, and major market segments, 2007 Census
- \* Service Annual Survey: Industry receipts and % changes
- \* Non-employer receipts of 906,000 sole proprietorships without payrolls, IRS data
- \* Summary & analysis: no. of cleaning establishments in U.S. and for leading states; no. of firms; industry size; avg. receipts per office by top states; mkt. share top 50 firms ratios; summary findings of 2007 Census & comparison to 2002 data... re: legal form of organization, firms & estabs. by sales size (in receipts & employment); single/multi-unit operations.
- \* Labor productivity ratios: by industry segment: 2007
- \* Summary statistics: 1997 vs. 2002 vs. 2007 - no. of estabs; total industry vs. disinfecting/pest control, other services; annual receipts; payroll costs; no. of workers; payroll per employee; receipts per employee, receipts per establishment.
- \* Geographic analysis - share of national receipts, avg. receipts per estab., by state, top states' ranking: 2002, 2007
- \* Industry Financial health: composite income statement & balance sheet ratios, profitability trends, by size of cleaning contractor (janitorial services, pest control, other services: 2007-2011

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- Receipts & avg. receipts per establishment, by state - 1997, 2002, 2007.

Janitorial-Building Cleaning & Maint. Services

- Janitorial service firms, by legal form of organization - corporate, sole proprietorships, partnerships: 1997 & 2002, (no. of firms, receipts, payroll as % receipts, no. of employees)
- Single vs. multi-unit operations, by size (statistics as above) 1997, 2002, 2007
- Concentration Ratios : ratios by top 4, 8, 20, 50 largest firms 1997, 2002, 2007
- Janitorial service firms, by receipts size (under \$100,000 to \$100+ mill.) (no. of firms, estabs., receipts, payroll, avg. receipts per firm), 1997, 2002, 2007.
- Receipts & avg. receipts per establishment, by state - 2002, 2007.

Exterminating & Pest Control Services

- Exterminating & pest control firms, by legal form of organization - corporate, sole proprietorships, partnerships: 1997 & 2002, (no. of firms, receipts, payroll as % receipts, no. of employees) -
- Single vs. multi-unit operations, by size (statistics as above) 1997, 2002, 2007
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- (all tables , as above) - 1997, 2002, 2007

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- (all tables , as above) - 1997, 2002, 2007

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- \* Summary - how many exist? - Entrepreneur magazine's 2011 Franchise 500 ranking, Discussion: how cleaning franchises work and differ, services typically provided by parent, master franchises,
- \* Analysis of **avg. initial franchise fees/royalty rates/start-up costs**
- \* The industry's leading franchisers: parent co. vs. **systemwide revenues**, avg. estimated annual receipts, difficulties estimating revenues due to full-time vs. part-time workers; franchise investment pkgs. sold.

### Tables:

- The major commercial cleaning franchises: 10 companies' systemwide sales: 2011.
- Top janitorial franchises (no. of units 2006-2008, franchise. fee, royalty %, start-up \$)
- The major commercial cleaning franchises, by no. of units: 2008-2011.

### Profiles of The Leading Commercial Cleaning Franchises & Non-Franchise Firms

(For each company below: discussion & analysis of services offered, divisions, franchise packages offered/cost, markets served; strategies, UFOC financials; 2009-2011 sales when avail., history & recent developments; acquisitions, number of franchises; marketing strategies)

- \* ABM Industries
- \* Anago Cleaning Systems
- \* Bonus Building Care
- \* Clean Net USA
- \* Coverall North America
- \* Jan-Pro Intl.
- \* Jani-King Intl.
- \* ServiceMaster (incl. ServiceMaster Clean)
- \* UGL UNICCO Services

## **Reference Directory of Industry Information Sources**

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- \* Addresses, phones, contacts at major industry trade associations, trade journals, consulting firms: commercial cleaning and carpet cleaning segments.