

State of the Market Survey 2021

Local Authority Catering Services



The state of the market survey was conducted by Vickie Hacking, APSE Principal Advisor.

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Local Authority Catering Services

State of the Market 2021

APSE conducted an online survey in December 2020 and January 2021, which was sent out to local authority catering contacts throughout the UK and 74 responses were received.

A series of questions were asked covering attitudes to the issues currently facing catering, the operation of the catering organisation and challenges for the future. The majority of the questions have been surveyed since 2008 and trends are now apparent.

In addition, included in this briefing is an overview of the responses received to a survey conducted in November 2020 regarding the impact of COVID-19 on the delivery of local authority catering services.

The data collected through these surveys is intended to provide a snapshot of the perception of local authority caterers. For detailed and verifiable comparison of both financial and performance data, authorities should consider joining APSE performance networks which covers education, civic and welfare catering.

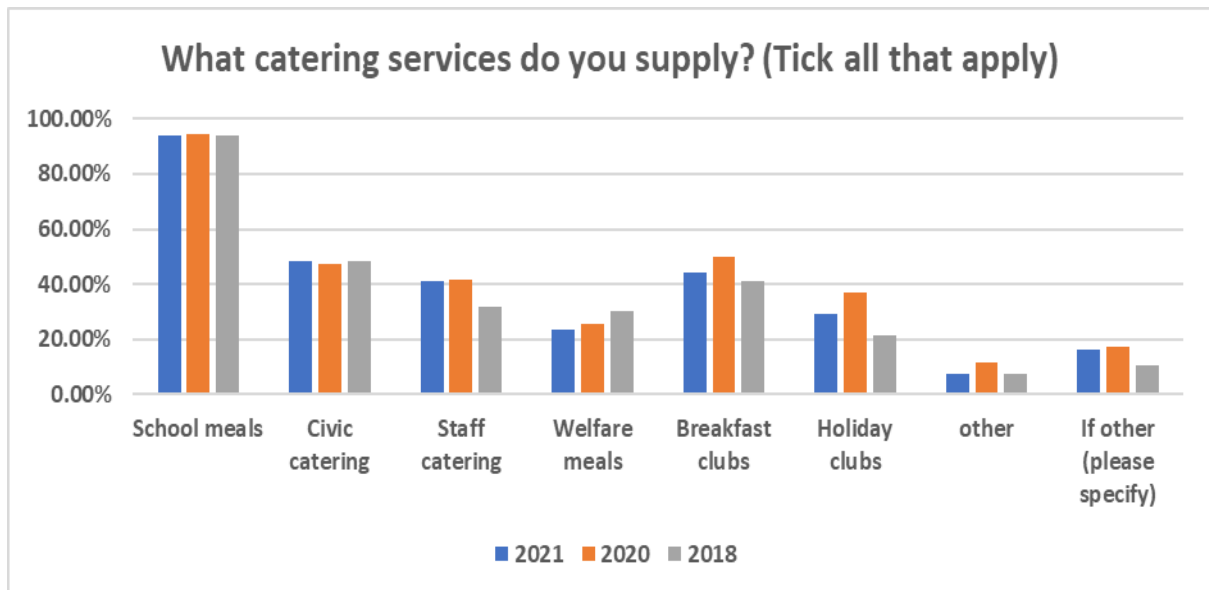
1. Results

Respondents were UK wide with 56.75% from England, 22.97% from Scotland, 17.57% from Wales and 2.7% from Northern Ireland. The survey therefore reflects APSE's UK wide membership and provides a national reflection of opinion.

2. Scope of the catering service

What catering services do you supply?

The graph below outlines what catering services councils supply for 2021 and also provides a comparison with the surveys undertaken in 2020 and 2018.



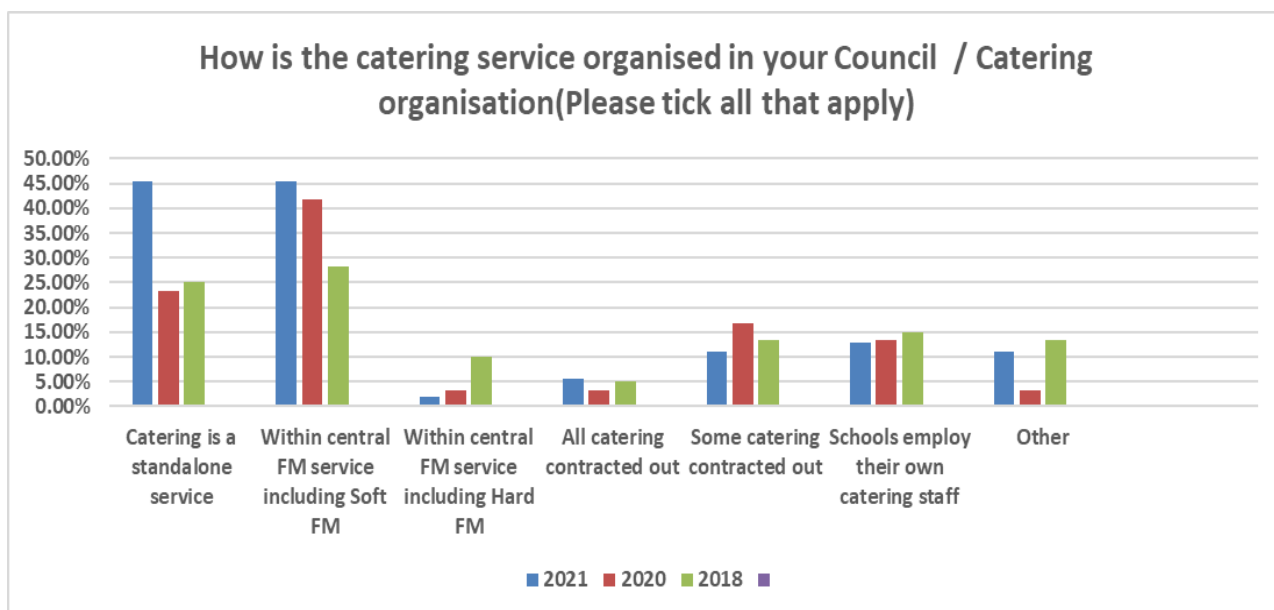
The responses show that the scope of the Catering Service remains consistent with last two surveys and it is clear that school catering remains the dominant service with 94.12% of respondents advising that they provide this service. The number respondents reporting that they provide welfare meals has decreased by 6.77% since 2018. Respondents also commented that other catering services supplied:

- Wrap around care
- Care homes
- Public and community cafes
- In parks

How is the catering service organised in your council / catering organisation?

The survey sought to gain information regarding how the catering service was organised in councils.

The graph below outlines the responses received and provides a comparison with the last survey conducted.



The 2021 survey states that 45.45% of respondents report that the catering service is either within central FM service including soft FM or is a standalone service. The number of respondents advising that catering is a standalone service has seen the greatest increase of 22.12% from 2020. The highest decrease can be seen in respondents reporting that some catering is contracted out which has decreased from 116.67% in 2020 to 10.91% in 2021.

Workload

How do you expect workload to change over the next 12 months?

The survey asked how workload was expected to change over the next 12 months both personally and for the wider catering service.

The majority of respondents (75.76%) expected that their personal workload would increase, 19.70% thought it would stay the same and 4.54% believed their personal workload would decrease. When referring to the catering section, 50% of respondents expected that the workload would increase, 27.94% thought it would remain the same over the next year and just over 22.06% believed it would decrease.

3. Staffing

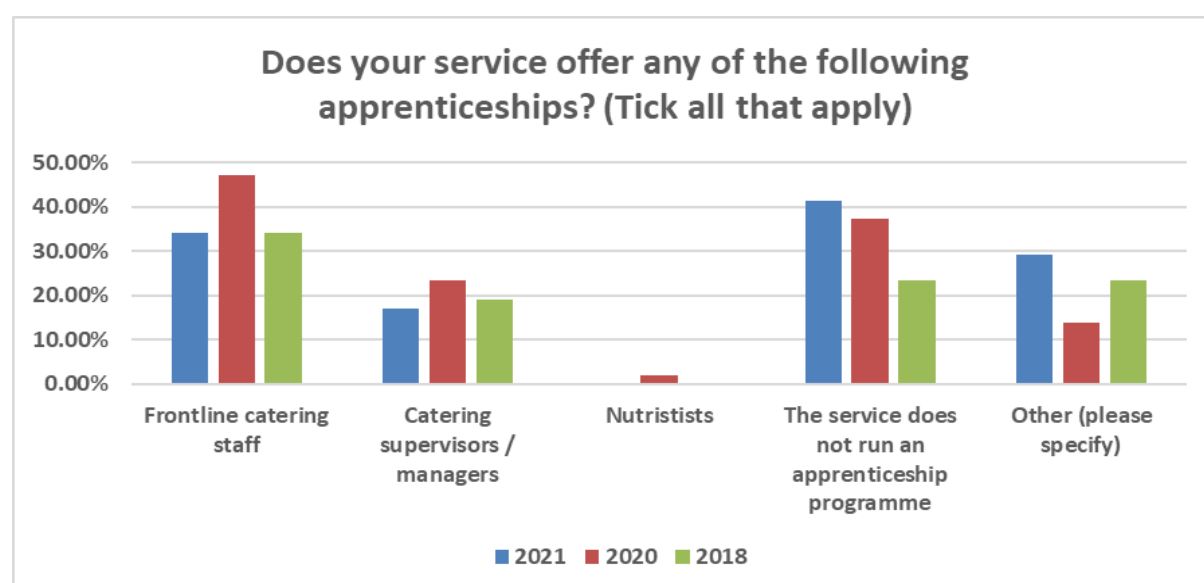
All employers must now pay the National Living Wage. However: Do you pay the higher Living Wage Foundation Living Wage?

The majority of respondents 76% report that they pay the National Living Wage which is an increase of 17.82% from 2020, a further 24% report that the higher foundation living wage is not paid.

The average hourly wage for a catering assistant was given as £8.65 which is a reduction from the rate of £9.25 reported in 2020 and is comparable with the average rate reported in 2018 of £8.62. The rates of pay range from a minimum of £8.72 to a maximum of £11.50.

Does your service offer any of the following apprenticeships?

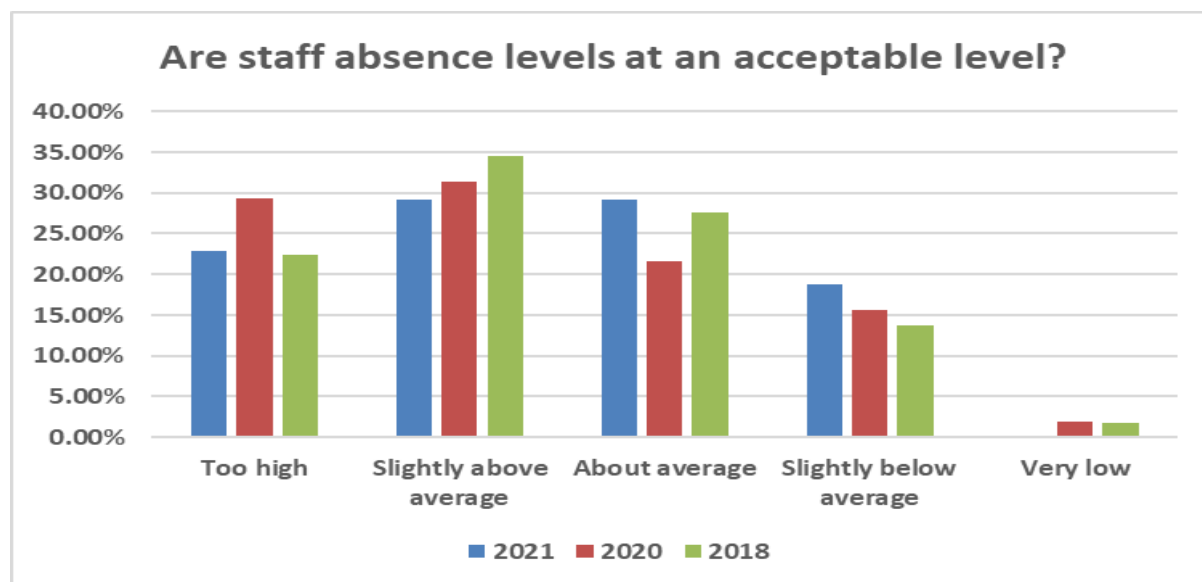
From 2018, the APSE State of the Market survey introduced new questions focusing on apprenticeship programmes and if councils offered apprentices in the catering service. The graph below highlights the areas of the service where apprenticeships are in place from the responses in 2018 and 2020.



The responses highlight that the majority of respondents to the survey do not run a scheme 41.46%. The most common apprenticeship offered continues to be for frontline catering staff. It is commented that the catering service offers apprenticeships in business admin and data analysis. For those councils advising that they do not offer apprenticeships the reasons provided included staff only being on 30 weeks per year contracts and that apprenticeships have been put on hold due to the COVID-19 pandemic.

Are staff absence levels at an acceptable level?

The State of the Market survey sought to establish what the perception of the respondents was in relation to the level of staff absence. The graph below outlines the views of the respondents for 2021, 2020 and 2018.



The greatest percentage of respondents in 2021, (29.17%) perceived that staff absence was slightly above average or about average. There were no respondents stating that they thought the absence was very low. When making a comparison with 2020 there has been a 6.49% reduction in the number of respondents stating that they thought the staff absence was too high.

Which of the following staff training applies to your authority/organisation?

The vast majority of respondents, 95.56% report that the catering section holds regular staff training, 80% state they have regular staff appraisals and 64.44% advise that a catering section newsletter was circulated. The number of respondents reporting that the organisation holds Investors in People has increased by 11.11%. In addition, it was report in the comments that councils had an accredited training centre and that they ran events for their catering staff.

4. School meals

What do pupils pay for a school meal?

The survey asked respondents to state the amount pupils pay for a school meal. The lowest amount paid primary school meals is £1.60 and £1.75 for secondary school meals. The highest price reported to be paid for primary schools is stated as being £3.25 and is slightly higher at £3.05 for secondary schools.

The average that a pupil pays for a primary school meal is £2.26 which is a slight increase of £0.04 from 2020. The secondary school average price is currently at £2.41 which is an increase of £0.02 from the last time the survey was conducted.

It should be noted that due to the nature of the school catering sector, there were a minority of respondents that reported the price paid for a school meal was dependent on the contractual arrangement with the individual school.

What measures has the service taken to mitigate the impact of rising food costs?

The table below provides a comparison of the measures that respondents have reported taking to mitigate the impact of rising food costs for both the 2021 survey and 2020.

	2021	2020
Worked with suppliers	87.04%	93.33%
Increased the use of seasonal produce	40.74%	46.67%
Introduced meat free days	38.89%	38.33%
Reduced the options available	33.33%	28.33%
Decreased portion sizes	3.7%	5.0%
Other (please specify)	14.81%	15.0%

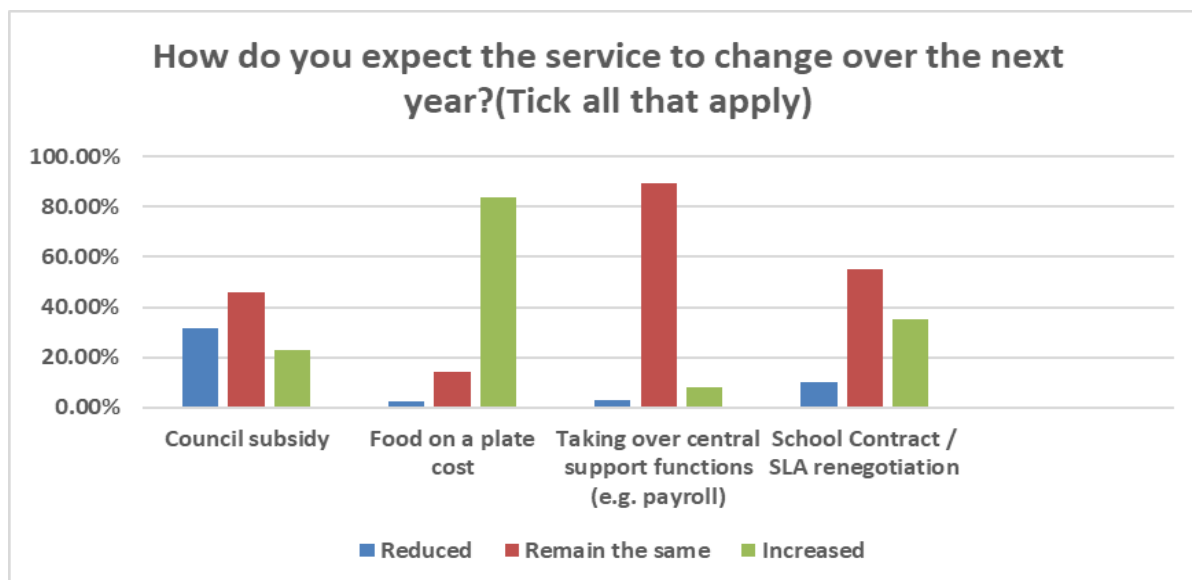
In addition to the response choices outlined in the above table, respondents to the 2021 survey also reported that they had taken the following measures: -

- Introduced pre-ordering systems to reduce food waste and over production
- Adapted recipes to include less costly ingredients
- Removed the use of agency staff

5. The catering service

Overall, how do you expect the following to change over the next year?

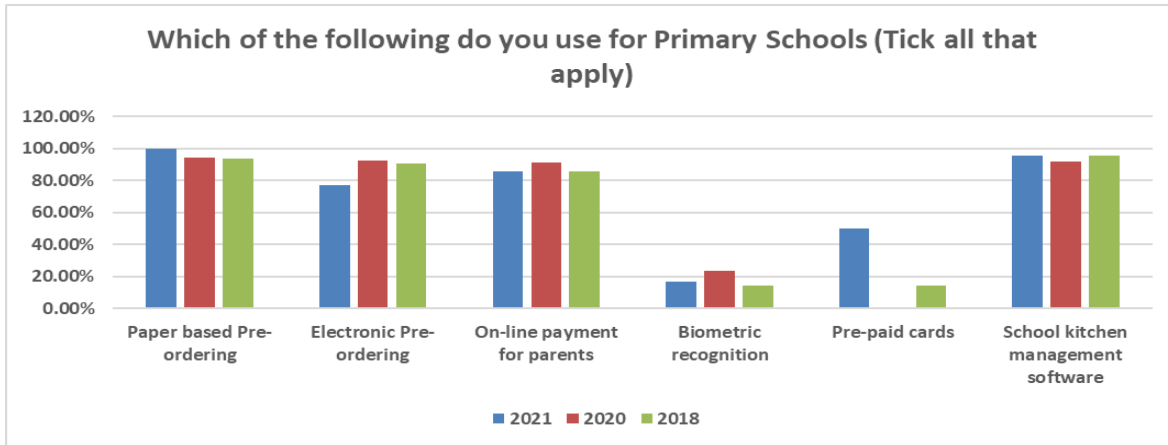
The survey sought to gain an understanding of the expectations for catering service over the next 12 months. The graph below highlights the responses received.



The survey highlighted that the majority of respondents predicted that council subsidy, central support function and contract/SLA renegotiation would remain the same. However, over 83.72% of respondents believe that the food on the plate cost would increase. Although no comments were submitted to advise why respondents thought this to be the case it could be attributed to the increases seen in the last two years and the impact of Brexit.

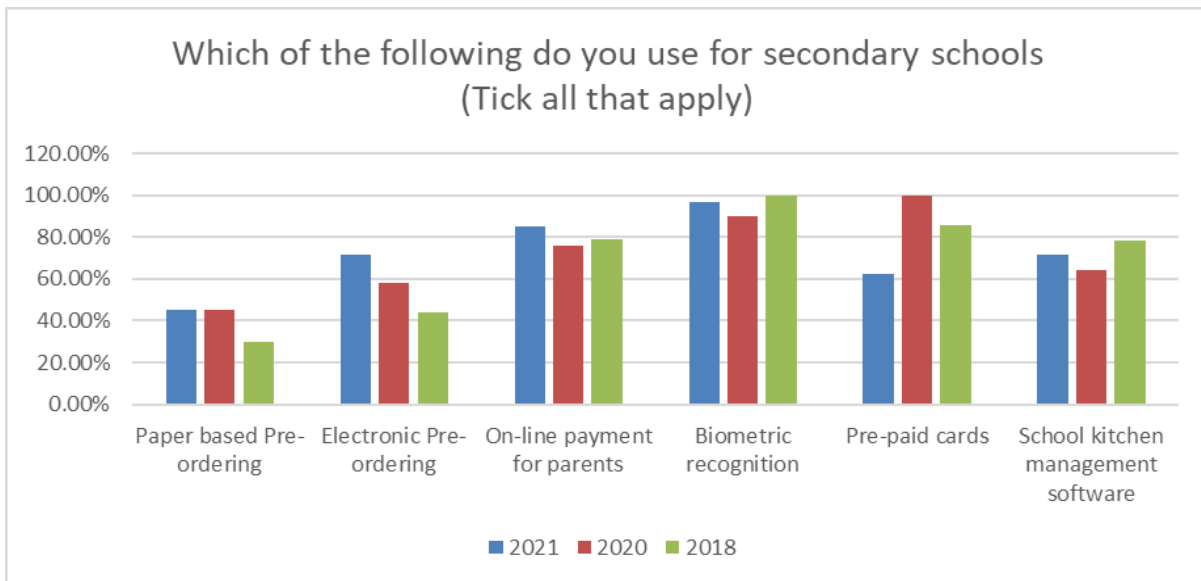
Which of the following do you use?

Many Councils use a catering software package to comply with nutritional requirements. Several systems exist to assist with productivity to reduce queuing, waste and the requirement to handle cash. The graphs below outline the percentage of respondents that report the systems are utilised in at least one school for both primary and secondary schools.



For primary schools the use of paper-based pre-ordering and school kitchen management in remains has remained consistent over the last three years.

The use of electronic pre-ordering has seen the greatest decrease in 2021, with 14.92% of reporting that they had this system in place. The use of prepaid cards has seen the largest increase of 35.71% from 2018.



In secondary schools the responses outlined that there has been an increase in electronic pre-ordering of 13.54% from 2020. On-line payments have also increased by 9.28% from 2019. However, the use of pre-paid cards has seen the greatest decrease of 23.21% when compared with the responses from 2018.

6. Selling services outside the council

Do you sell your services outside of the Local Authority?

As councils seek opportunities to commercialise and safeguard the service budget, APSE was keen to establish where local authorities were selling their services. The graph below highlights the results from the 2021 survey and provides a comparison with 2018.

The highest percentage of respondents (42.55%) state that they sold services to Academies / Free Schools. A further 21.28% sell to other public sector bodies, 17.02% state that they sell the service to the private sector. In addition, there are 40.43% of respondents advising that their authority does not sell to outside the local authority. In responding to this question, it was also confirmed that the council catering service also provided services for schools outside their local authority area

7. Comments on the future

Growth areas

Clearly there will be some variance in answers between the authorities responding to this question, with a minority reporting that they do not foresee any area of growth for their service. Catering managers saw growth for the service over the next 12 months in the following areas:

Answer choices	Response
Cookery classes / workshops	25.58%
Hospitality catering	27.91%
Catering for early years	46.51%
Catering for higher education establishments	4.65%
Catering for other public sector organisations e.g. police force, fire services	11.63%
Selling services to other councils or council areas	41.86%
Providing courses in hygiene, nutrition etc	37.21%

Areas of future decrease

Again, many local authorities responding to this question reported that they do not expect any areas of decrease in their service. However, where respondents

commented on decreases in work for the service these were identified as being the following areas:

Answer Choices	Response
Contracts with schools	59.38%
Contracts with academies	53.13%
Reduction in civic catering	37.50%

The Association for Public Service Excellence

APSE member authorities have access to a wide range of membership resources to assist in delivering council services. This includes our regular advisory groups, specifically designed to bring together elected members, directors, managers and heads of service, together with trade union representatives to discuss service specific issues, innovation and new ways of delivering continuous improvement. The advisory groups are an excellent forum for sharing ideas and discussing topical service issues with colleagues from other councils throughout the UK.

Advisory groups are a free service included as part of your authority's membership of APSE and all end with an informal lunch to facilitate networking with peers in other councils. If you do not currently receive details about APSE advisory group meetings and would like to be added to our list of contacts for your service area please email enquiries@apse.org.uk.

Our national advisory groups include: -

- Building Cleaning
- Catering
- Cemeteries and Crematoria
- Environmental Health Advisory Group
- Housing, Construction and Building Maintenance
- Local Authorities Commercialisation, Income and Trading Network
- Parks, Horticulture and Grounds Maintenance
- Renewables and Climate Change
- Roads, Highways and Street Lighting
- Sports and Leisure Management
- Vehicle Maintenance and Transport
- Waste Management, Refuse Collection and Street Cleansing

APSE's latest research written in collaboration with CIPFA looks at the position regarding the provision of a selection of discretionary support services to schools by local authorities.

Further details of the Selling Services to Schools research and a copy of the full report can be obtained on the APSE Website: - [Selling Services to Schools](#)

If you require any further information on the findings of this State of the Market survey 2020 please contact Vickie Hacking at vhacking@apse.org.uk or by phone at 0161 772 1810.