



Education Catering: Trend analysis 2016/17

This briefing provides details on the performance information available from APSE's performance networks service looking at performance indicators and current policy issues for councils who deliver education catering services.

Key issues

- School Meal uptake in the primary sector has climbed above 66% in England and above 60% in Scotland following the introduction of Universal Infant Free School Meals.
- School Meal uptake in the secondary sector has climbed to above 72% in England, 69% in Wales.
- The UK average productivity stands at 9 meals served per staff hour
- Average food cost per meal stands at 76 pence

Overview

The APSE performance networks programme for education catering provides performance indicators for price, service uptake, key cost indicators, productivity and qualitative measures for the service throughout the UK.

Further, the programme continues to capture a significant amount of management data to **support more detailed 'process benchmarking' of the service including its contribution to child health promotion and sustainability.**

This briefing aims to provide participating authorities with a picture of what the service trends are, what this infers and what further activity and analysis individual authorities and their **benchmarking groups could consider. In this respect, it serves as a 'high level' guide only to highlight key challenges facing the service and may provide a strategic overview for those wishing to 'drill down' into the drivers, policies and processes which affect their group or individual service and financial outcomes.**

As in previous years, our analysis also highlights variances arising from the distinct policy approaches between Scotland, England and Wales, and reference is made to previous year **outcomes where clear trends or 'direction of travel' are evident.**

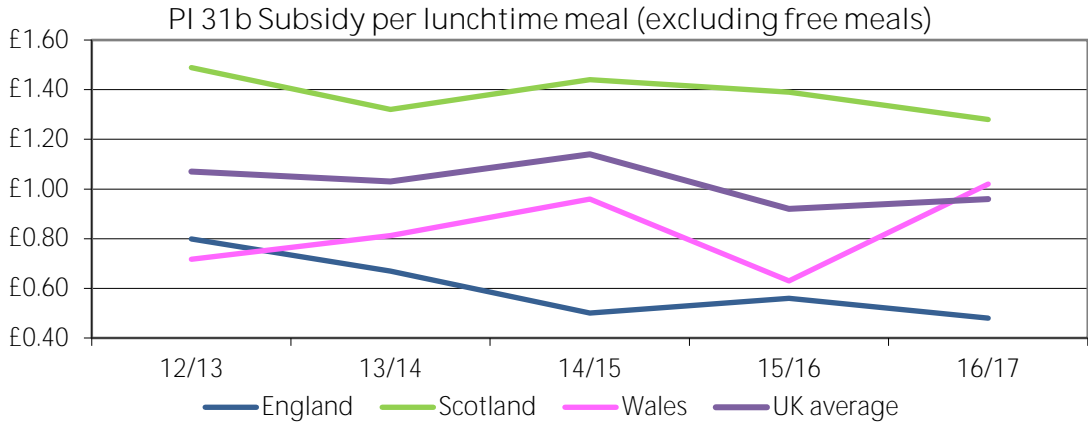
With data now captured for universal free meal uptakes (in England and Scotland) across this full year, these **are reported below alongside previous 'high level' uptake PIs where year on year (trend) analysis remains relevant and possible.**

Trend analysis

The trend analysis in this briefing is based on 'service wide averages' across all family groups and within each country (England, Scotland and Wales – where relevant) for the past 5 years. These averages across all returns to the programme can contain spikes or variations caused by any change in the profile or number of subscribers making returns to the programme. However, separate analysis of those authorities who have consistently made returns over the last 5 years, has or may be undertaken to support validity in the observations made below and any subsequent (second batch) reports.

Meal charges

Analysis of paid meal charges (including the highest and lowest within each service) shows a limited change and below average inflation in charges being applied in England and Wales. For the second year running, data from Scotland suggests a more consistent application of price increases, the average being marginally above inflation for the year, reflecting in the subsidy level shown in the graph below.

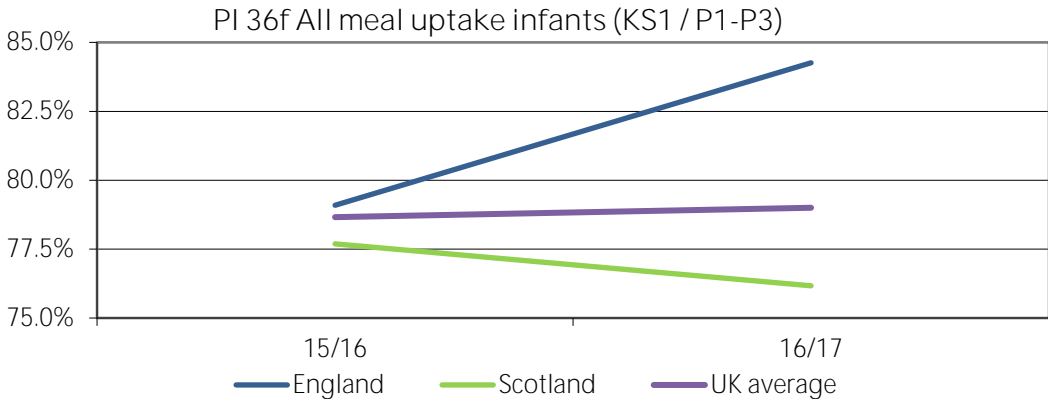


Service uptakes

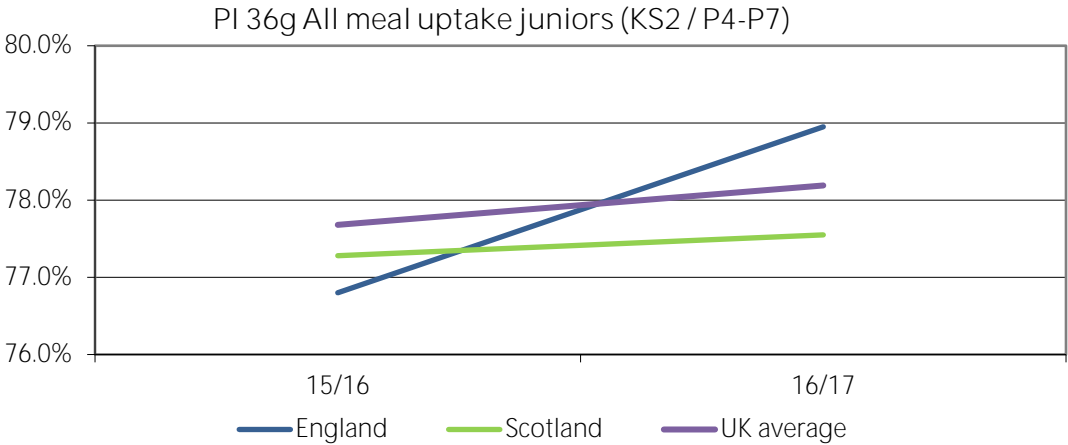
For the last two years, the education catering service has captured uptake data split between infant and junior aged pupils (key stage 1&2 in England and Wales), driven by the introduction UIFSM in Scotland and England.

The following graphs for these 2 years show a continued improvement of infant meal uptakes in England, perhaps driven by a growing awareness in schools of the beneficial effect of higher KS1 uptakes on provider charges and individual school budgets.

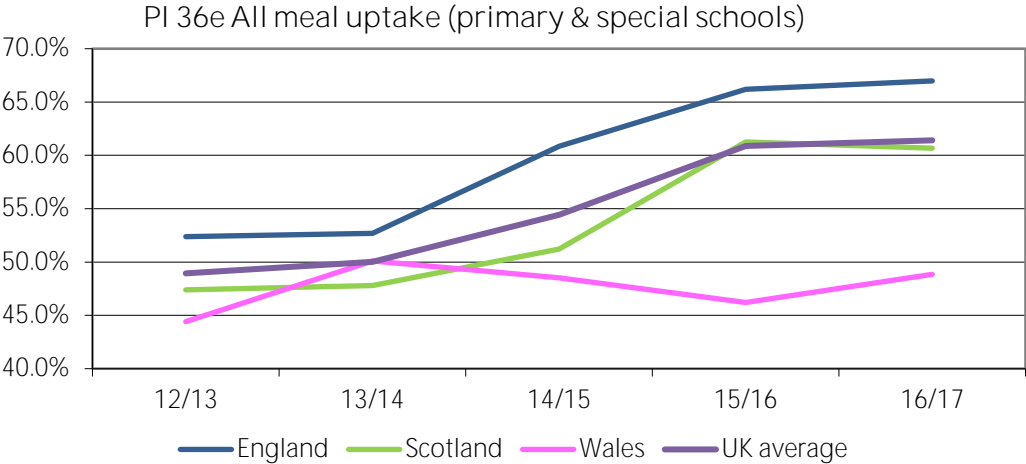
This may be less evident in Scotland where national funding arrangements do not currently delegate school meal budgets and accordingly, movement in uptakes, performance outcomes and charges do not directly impact upon funds managed by the school.



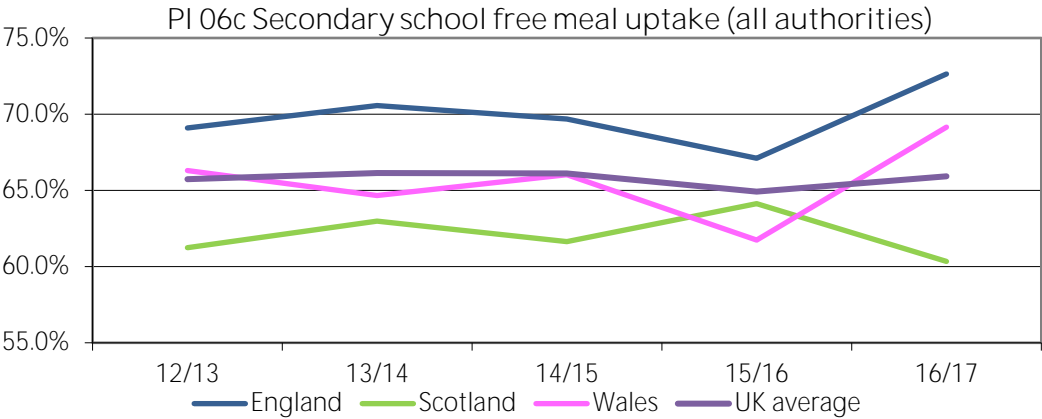
Outcomes in the Junior Sector show an improvement of circa 2% on paid meals in Scotland (where average price increases have kept pace with or have been above inflation) but have fallen by a similar margin in England. Conversely, junior free meal uptakes have remained largely static in Scotland but risen marginally in England.

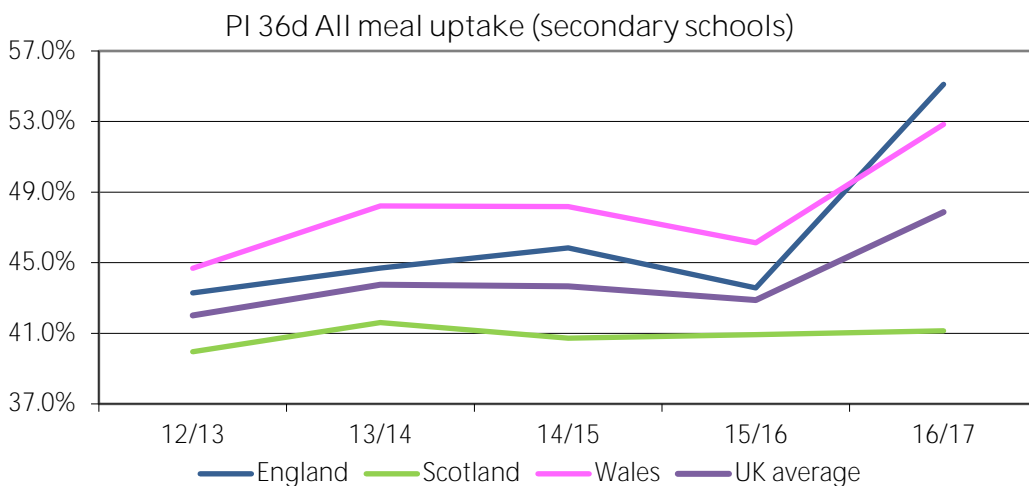
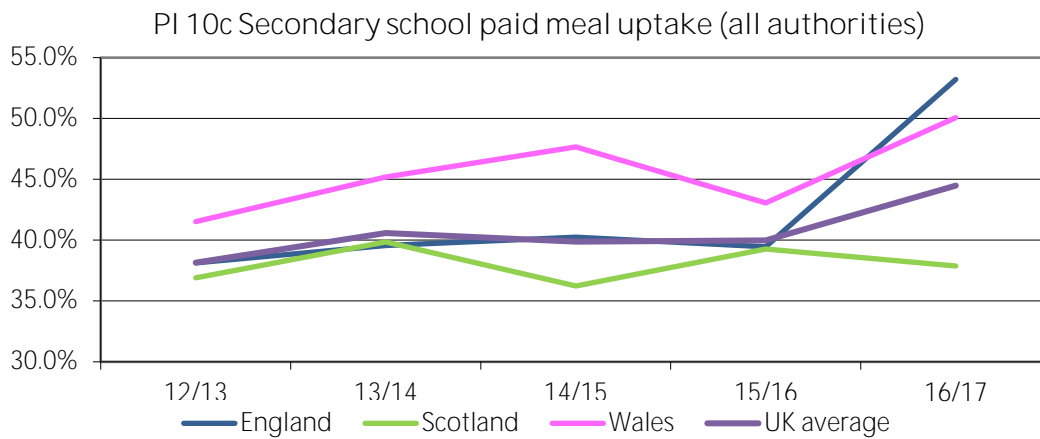


The effect on 'All Meal Uptakes' In Primary and Special Schools over the last 5 years (and particularly from the introduction of UIFSM) is evident in the following graph.



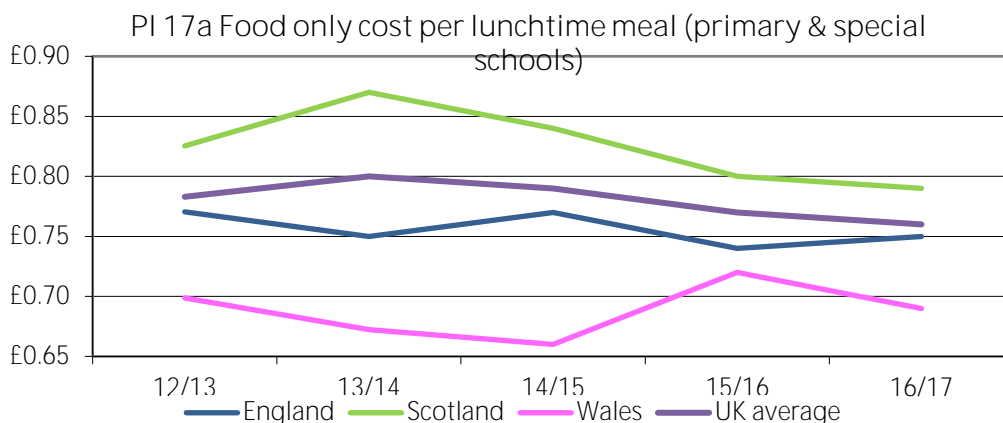
In the secondary sector, data suggests that there has been a marked improvement in both free and paid meal uptakes across England and Wales, a sector in which Scotland has remained consistently below the UK average for reasons that are likely to reflect a wide range of historical factors including their different approach to nutrition and school funding arrangements.



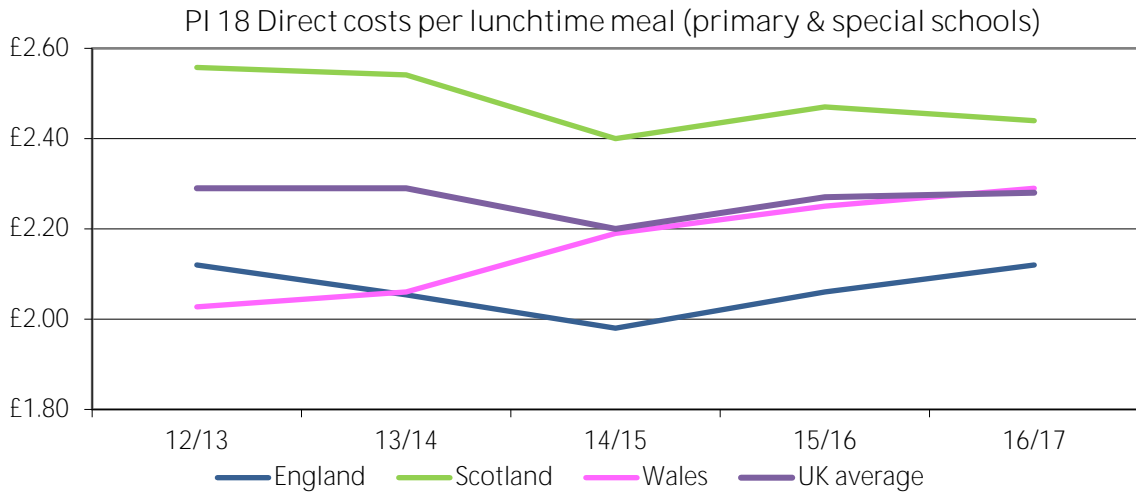


Key cost indicators

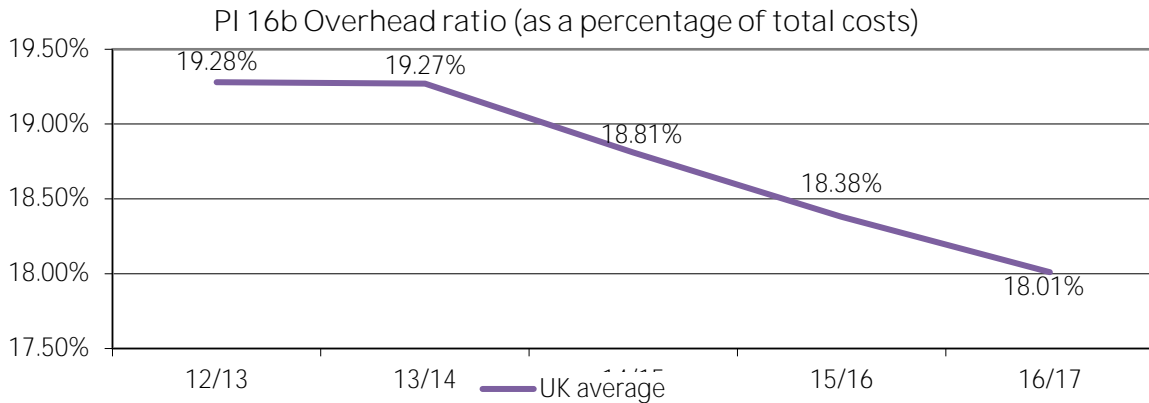
After a marked variance across the UK in food only cost per meal in the primary and special school sectors, the last two years started a trend of convergence which has continued between Scotland and England into 2016/17. An apparent fall on this PI (across those authorities submitting data from Wales this year) has however maintained their long-term trend of spending 5 to 7p less than their English counterparts.



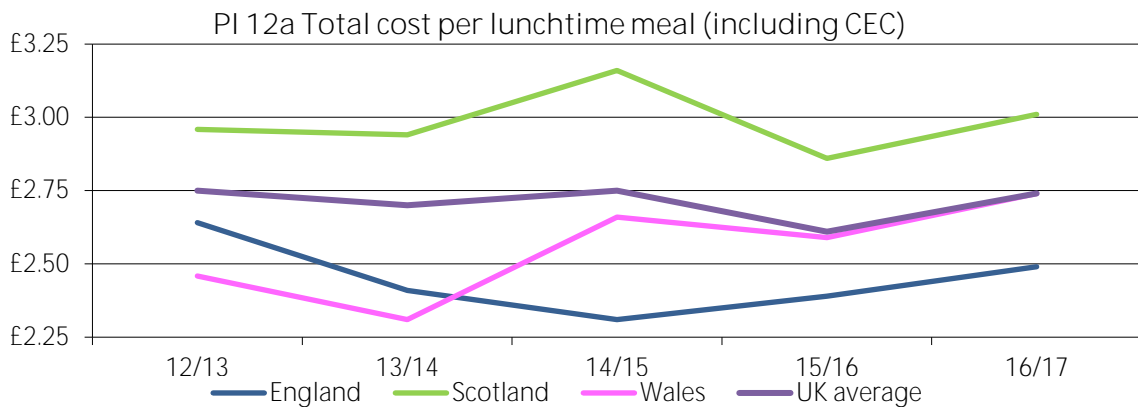
Again, data from Scotland shows some convergence with England and this graph demonstrates the positive effect of UIFSM on the long-term trend on this PI. In the absence of this initiative, Wales continues to show effective control over direct food and labour costs, achieving an outcome in line with the UK national average, which shows a real long-term productivity gain for the service over the last 5 years.



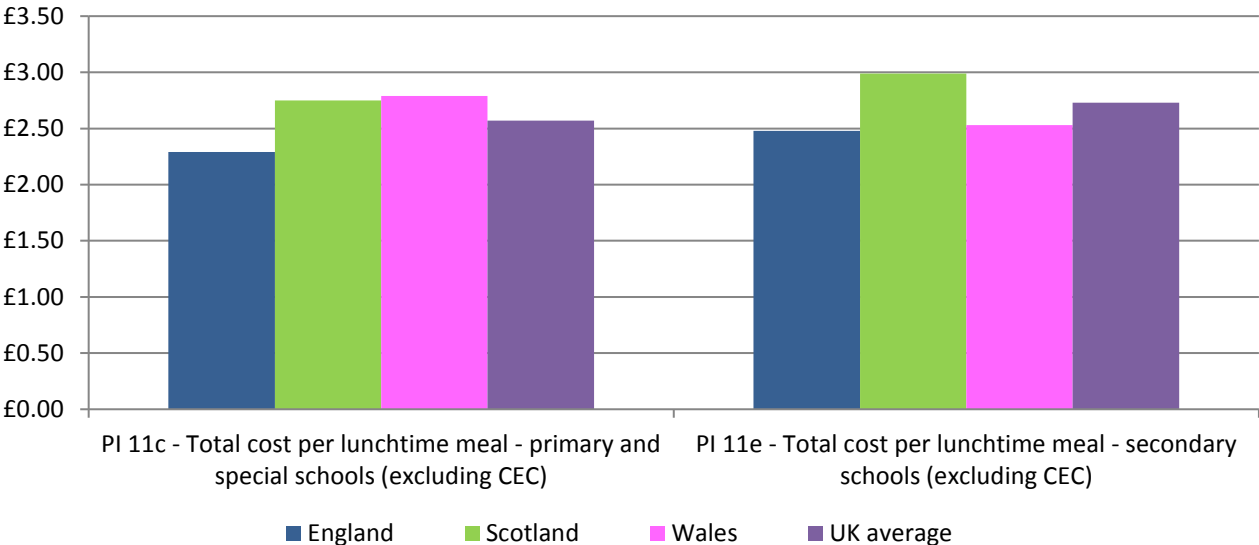
As a percentage of total service costs, overheads across the service have fallen again in 16/17, no doubt aided by improving uptakes, particularly in the secondary sector.



Contributing to this outcome, central establishment charges (CECs) as a percentage of total cost, have fallen sharply in Scotland, bringing the UK average to a new low of 4.49% in 2016/17. Reflecting the comments made on direct costs previously, the graph below highlights how this service has absorbed labour and other inflationary pressures over the last 5 years, largely containing the true cost to schools and parents (including free breakfasts in Wales) and representing a productivity gain (against CPI inflation) of circa 8% over that period.

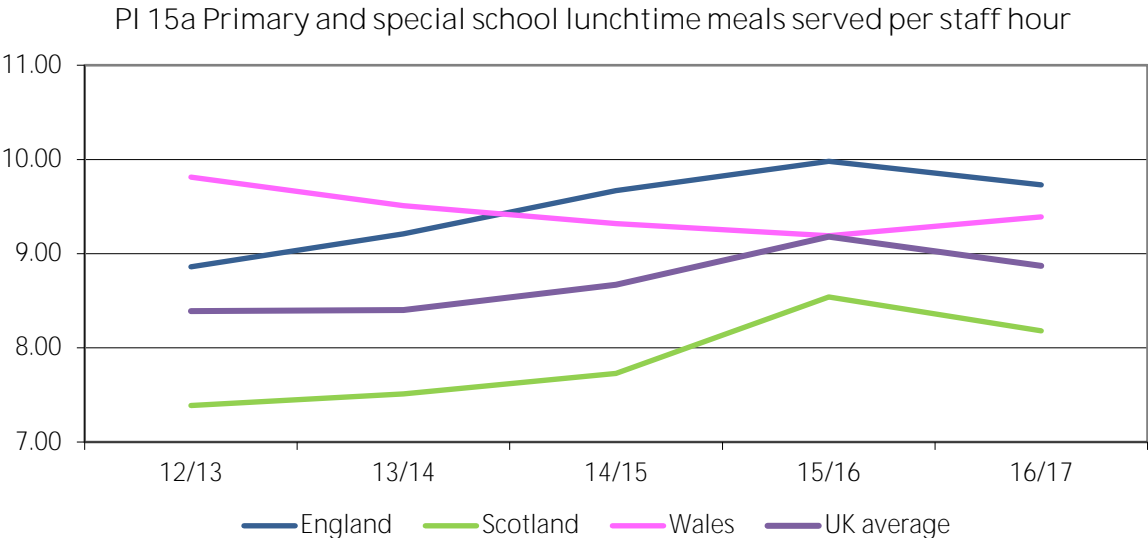


To aid in more detailed analysis of this PI, the programme has collected and reported on this and other high-level PIs by sector (primary, special and secondary schools) over the last 2 years. The following graph shows how the total cost per meal in 2016/17 varies between these sectors in each country and shows a marked correlation with uptake outcomes (above) in each country/sector.

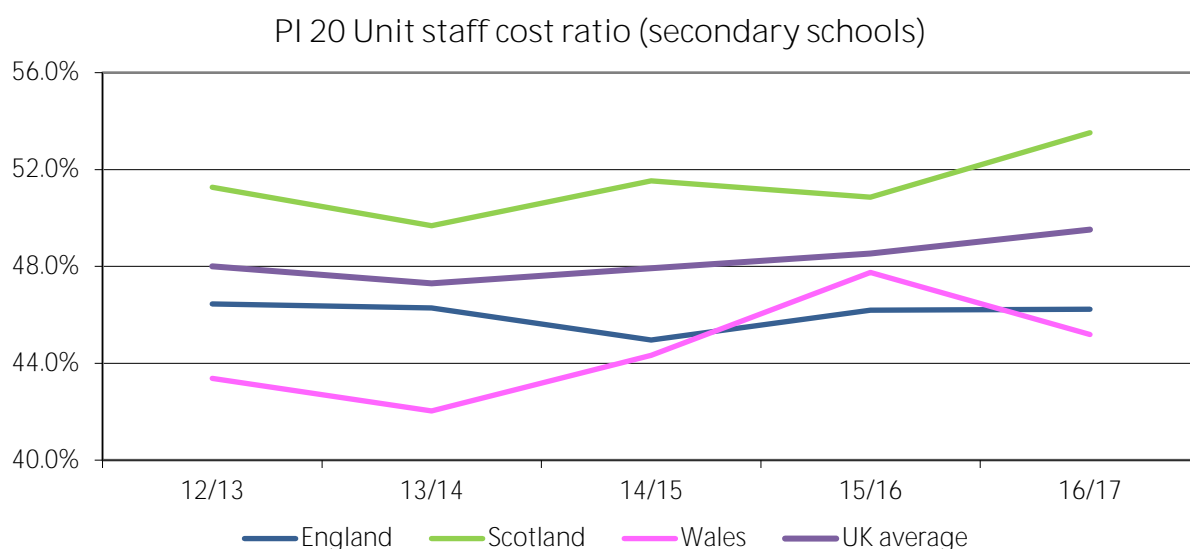


Productivity

The following graph again highlights the link between productivity and meal uptakes, which peaked in 2015/16 with the first full year of UIFSM but has fallen back slightly in Scotland this year. The reported improvement of primary meal uptakes in Wales is also evident in this PI and whilst England shows a small decline in 2016/17, it maintains the highest average across both uptake and 'productivity' PIs in this sector.



A similar correlation is evident in the secondary schools where the marked uptake improvement in England and Wales has contained or improved unit staff ratios in this sector.



Nutrition and healthy eating

There has been no marked change in the number of staff trained in food nutrition across the UK, the percentage of all staff being reported at 70% in 2016/17.

The reported number of schools offering a breakfast service (as a percentage of all schools) has fallen by circa 8% across the UK, (6% in Wales) the average for each country being shown in the following 5-year table. As in previous years, second batch reporting will confirm and update 2016/17 outcomes which might otherwise be a reflection of the impact of UIFSM in England & Scotland.

	England	Scotland	Wales
2012/13	20.6%	23.7%	54.6%
2013/14	14.1%	32.8%	60.1%
2014/15	14.8%	25.8%	68.5%
2015/16	14.3%	26.9%	70.6%
2016/17	10.7%	19.3%	64.7%

Sustainable procurement and the environment

PI 39 remains broadly in line with outcomes reported last year, i.e. only a reported 8% of all schools (mainly secondary) still use some element of disposable cutlery or crockery. PI 40 has shown a further increase with service providers reporting that they operate or agree targets for reduction in energy consumption in 92% of their schools.

Interpretation of data

The country data above highlights historic and ongoing trends which are in part affected by the different legal frameworks, policies and funding arrangements established by each country.

There can however be little doubt that meal uptakes remain the key driver on productivity and cost outcomes in this service and that the introduction of Universal Infant Free School Meals (UIFSM) in Scotland and England, has had the largest single impact on this service over the last 5 years.

In Wales, the continued provision of state funded breakfasts and the above average uptakes and cost performance in the Secondary sector, continues to offset the absence of UIFSM for infant children and both of these initiatives will, over time, be a measurable factor in enhancing child health and educational attainment outcomes.

Individual authorities will no doubt have identified a wide range of reasons for any change in their own performance outcomes but understanding how comparative data can be used to inform improvement is at the heart of the Performance Networks programme.

In addition to the key and other performance indicators reported by the programme, the collection of a significant range of 'profile data' is designed to support the rationalisation of cost and other outcomes and enable effective 'process benchmarking' between local authority providers across the UK.

In the context of this trend analysis, we have drawn together a small range of 'profile data' (reflected in the table below) which may have some bearing on the country variations evident above and inform the effect of operating conditions and country policies on performance outcomes.

In each case, the averages and stats reported in this table exclude any 'zero' returns (unless confirmed as valid by the authority) and are therefore a true representation of the data collected for 2016/17 and cover a total of 3,094 schools across the UK.

Key profile data	England	Scotland	Wales
Average school role	279	258	222
Percentage of free meal entitlement (including UIFSM in England & Scotland)	46.50%	36.75%	18.94%
Average investment per school (over 3 years)	£4,520	£2,281	£5,185
Highest	£24,940	£11,968	£14,713
Lowest	£2,183	£939	£2,143
Ave time (in minutes) for lunch service (primary schools)	65	57	56
Highest	120	90	60
Lowest	45	45	45
Ave time (in minutes) for lunch service (secondary schools)	66	65	53
Highest	90	90	60
Lowest	40	40	45
Percentage of providers responsible for more than Education Catering (i.e. other 'FM' services)	20%	83%	0%
Percentage of schools holding FFL (or other 'Healthy Eating' award)	73%	70%	0%

When measured against the uptake, productivity and cost outcomes above, it is reasonable to assume that a number of these stats may contribute to the variation in country outcomes and that the same (and other 'profile' data) could equally be used to measure variations between individual or groups of authorities as part of an effective approach to 'process benchmarking'.

In this respect, APSE will continue to develop and reflect country and UK targets and update **the PIs and supporting profile data sets which enable subscribers to 'drill down' into factors** that affect evident variances in performance and support effective 'process benchmarking' to drive continuous improvement in this service. The issues raised in this briefing will also provide topics for discussion at the forthcoming APSE Soft FM seminar which will be held in Durham on Thursday 25 January 2018. [Click here for detail.](#)

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