

Providing Catering for International Students 2015

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TUCO

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CATERING FOR GLOBAL LEARNERS

International students contribute more than £7 billion to the UK economy and are of great importance to the UK higher education sector. This is not only because of the financial contribution they make but also the hugely positive diversification of campus culture and community that their presence brings.

For many international students, arriving in the UK can be a culture shock, with changes in language, clothes, food and social interaction often being different from what they expected. Globally, the eating of food is seen as common ground and whilst our UK food traditions can be daunting for new students, they also play a vital part in their educational experience.

We do though have a challenge. Generally, British people enjoy a variety of food, including dishes from around the world. However, this piece of research – the most comprehensive UK study of international students' eating and drinking habits to date commissioned by TUCO – indicates the majority of overseas students think meals served in this country are unhealthy, heavy and over reliant on meat, potatoes and vegetables. Taken together with a number of other findings, the research highlights opportunities for TUCO members to change their food offer, reconsider opening times, carefully plan their pricing strategies and provide an experience that provides value for money service for all international students.

University catering teams from across the UK have a large part to play in delivering a positive international student experience and ensuring that the 430,000 individuals who travel to study here every year see the UK as a welcoming and attractive destination for living and learning.

TUCO's inaugural research into how international students perceive the food offer at their universities will provide catering managers with invaluable insight and knowledge. The results will help universities to gain a better understanding of what overseas students want from campus food and drink services and how future provision could better meet their needs.

The universities that embrace this intelligence and use it to truly understand the needs of their international customers will be best placed to take advantage of the opportunities presented now, and in the future.

A handwritten signature in black ink, appearing to read 'P Rees-Jones', written in a cursive style.

Philip Rees-Jones

Non-Executive Director, TUCO

Director of Commercial Operations at University of Exeter

The UK is home to not only dozens of prestigious universities with excellent reputations, but to a wide range of courses which appeal to students across the world.

With around **18%** of higher education students in the UK coming from overseas, it is important that learners feel welcome. We know international students face many challenges whilst adjusting to life in a new country and food can form a large part of this unfamiliarity.

Right across the world, universities are working hard to become attractive destinations for students looking to study abroad. The appeal of a particular country or university can be greatly affected by how day-to-day life appears and catering forms a vital part of the overall student experience.

The University Caterers Organisation (TUCO) commissioned Qa Research to conduct a comprehensive survey of the views of international students on catering at their universities. The goal was for TUCO's 194 HE members to gain a better understanding of what international students want from their catering services.

In total the views of **636** international students from **16** different universities were gathered. With this number of completions the survey over-achieved on its aim to collect 500 survey responses from universities across the UK; in research terms this means we can be **95%** confident that the data has a margin of error of no more than **+/- 4%**.

This research aimed to discover what international students' current perceptions of UK university catering are, highlight areas for improvement and provide informed recommendations for TUCO members to use in the future development of their food and drink provision.

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A detailed version of this report is available at www.tuco.org/grow

Great care was taken to ensure the sample of international students involved in this research broadly reflected the picture and make-up of international students studying in the UK today. For more information on this turn to page 15.

An online survey garnered 636 responses spanning 16 universities and eight discussion groups collected the opinions of 70 overseas learners from six universities.

NATIONALITY

Students were asked to give their nationality and the table below shows the sample of students surveyed as well as the percentage of international students per continent (see universe column).

ITEM	UNIVERSE	COUNT	PERCENTAGE
Participants		636	100%
Nationality (grouped by continent)			
African	6%	66	10%
North American	5%	58	9%
Australasian (including Fiji)	0%	3	0%
European	39%	100	16%
Asian (including Middle East)	47%	375	59%
Unspecified	0%	1	0%
Gender			
Male	EU - 46%, non-EU - 52%	245	39%
Female	EU - 54%, non-EU - 48%	390	61%
Prefer not to say		1	0%

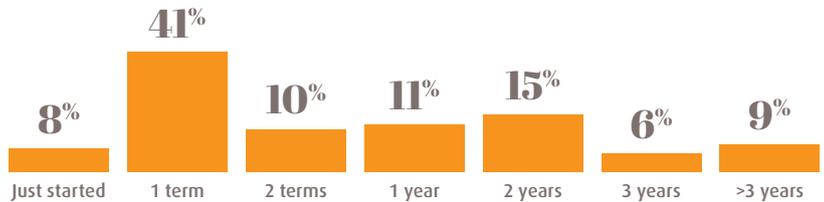
Base: 636

WHAT ARE THEY STUDYING?

Two fifths (41%) of respondents were in their first term at university, with 23% studying for a Master of Science course, 22% doing a Bachelor of Science degree, 15% completing a Bachelor of Arts course 14% on a PhD/Doctorate course.

HOW LONG HAVE THEY BEEN STUDYING IN THE UK?

Around half of the sample were relatively new to studying at university in the UK with 49% having been in the UK for one term or less.



DIETARY PREFERENCES?

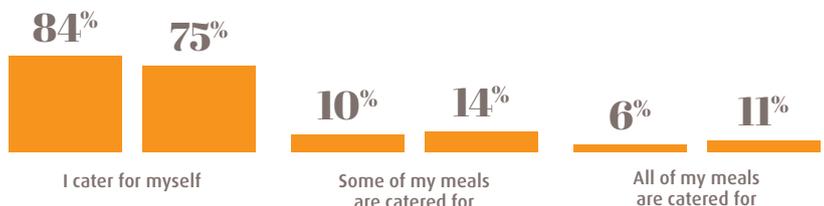
Two thirds (69%) of students have no dietary requirements, one in ten (14%) eat strictly halal meat, 8% are vegetarian and 4% do not eat red meat.

DIETARY REQ./PREF	COUNT	PERCENTAGE
None of the above	436	69%
Halal	86	14%
Vegetarian	48	8%
No red meat	26	4%
Vegan	11	2%
Pescetarian	10	2%
Diary free	15	2%
Kosher	6	1%
Coeliac/wheat & gluten free	9	1%
Sugar intake restrictions (diabetes)	8	1%

Base: 636

CATERED OR SELF-CATERED?

During term time, the majority (84%) of students who took part in the research live in self-catered accommodation. One in ten (11%) have all their meals catered for.





TUCO set out to answer ten key questions through this research:

DO INTERNATIONAL STUDENTS THINK THEIR HOME FOODS ARE READILY AVAILABLE IN UNIVERSITY OUTLETS?

Not really. A recurrent theme amongst respondents was the limited availability of world foods in university outlets and their desire to have a greater range of cuisines to choose from. Two thirds of students said they would be likely or very likely to buy their home foods if they were available in university restaurants. Significantly, **84%** wanted to eat a mix of foods from home and elsewhere and only **11%** wanted to eat food solely from their home country.

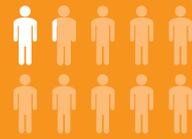
“In Japan we eat a lot of seafood, especially fish but even in London I couldn’t find a fresh one... it’s transported from the seaside?”

International student



67%

like to try different dishes that they may not have tasted before



12%

prefer to eat what they know



1 IN 10

Only one in ten would like to see more traditional British cuisine

WHAT CUISINES DO STUDENTS WANT TO SEE MORE OF?

“This is my third year, so I’m a bit fed up with the same stuff and the main reason is for us, specifically for us, I mean Asians, we need some like hot [spicy] food but we can’t find any...again we need variety, every day is the same kind of stuff...I don’t eat any more from there, I cook for myself at the moment.”

International student

“Many international students were very complimentary of the choice available in the grab and go outlets. It was felt this was something that caterers should continue with as they appeal to students in a rush; they like the option of being able to take most things away with them.”

Jeremy Bushnell, Qa researcher

ITEM	COUNT	PERCENTAGE
Chinese	268	42%
Italian	200	31%
Japanese	190	30%
Thai	158	25%
Indian	125	20%
British	114	18%
American	100	16%
Turkish & Middle East	88	14%
Mexican	79	12%
Spanish	66	10%
Malaysian	66	10%
French	57	9%
African	52	8%
Other country	51	8%
Greek	47	7%
Caribbean	24	4%
East European	22	3%
Portuguese	16	3%
South American	21	3%
Nordic	13	2%
North African	9	1%
Irish	2	0%
Base: 636		

ARE INTERNATIONAL STUDENTS HAPPY WITH CURRENT CATERING PROVISION ON CAMPUS?

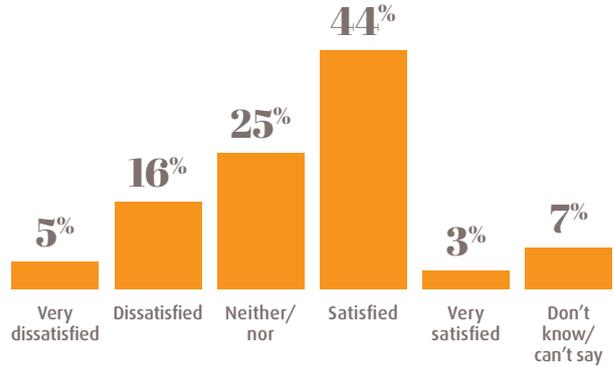
Just under a half of all students surveyed said they were satisfied with their university catering. There are some clear areas where university food operations are doing very well – meeting and often exceeding student expectations:

- Cleanliness**
- Friendliness of staff**
- Speed of service**
- Atmosphere**
- Grab and go offers**

HOW SATISFIED ARE YOU WITH UNIVERSITY CATERING?

“If it’s too crowded, they will come before the line and they’ll ask you if you want anything to drink, so before you reach the till your drink is ready for you.”

International student



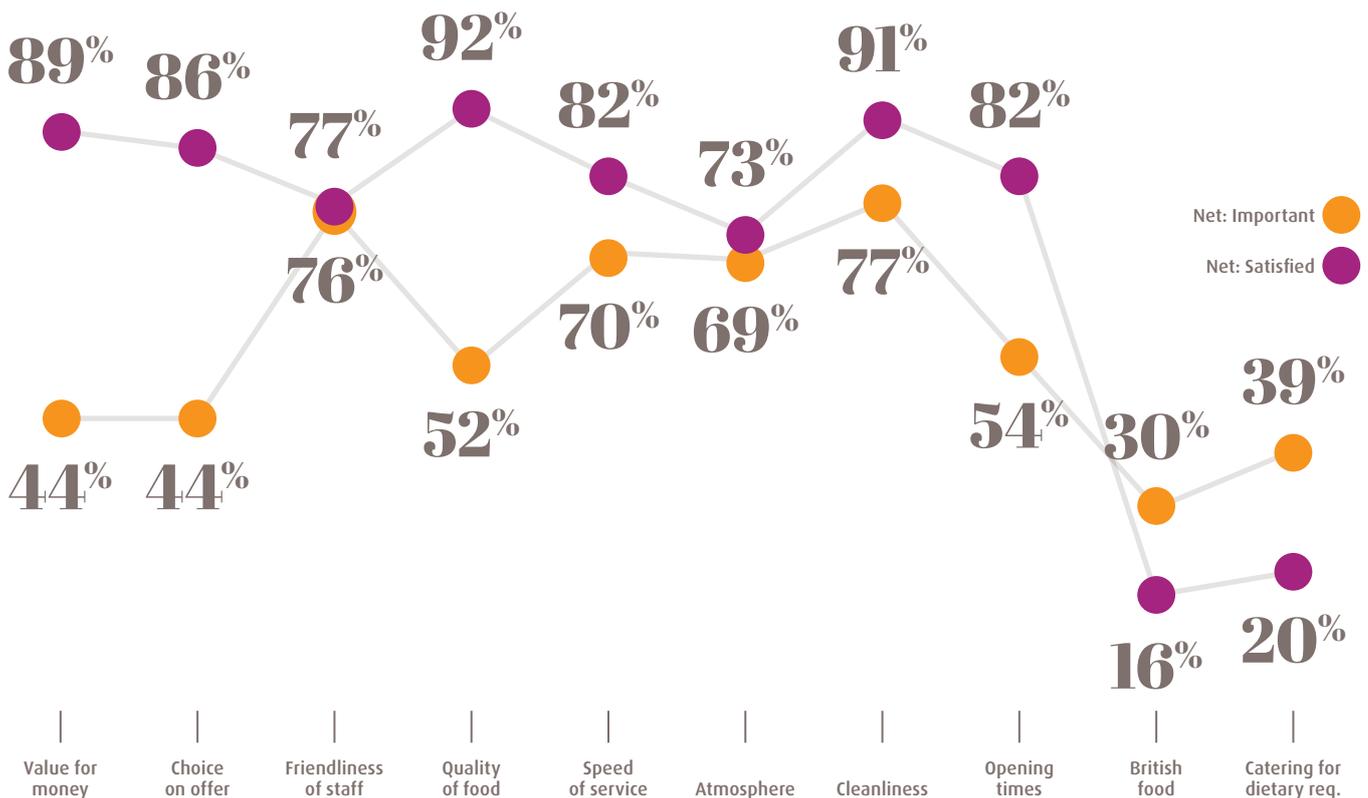
WHAT AREAS ARE STUDENTS NOT HAPPY WITH?

The research also indicated some specific areas of catering provision that international students are not satisfied with:

- Value for money
- Choice on offer
- Quality of food
- Opening times

IMPORTANCE VERSUS SATISFACTION

Value for money around healthier options was a sticking point. Students felt that if they wanted to eat healthier food options, they would be more restricted and it would cost them more.



IS THERE A PATTERN TO INTERNATIONAL STUDENTS' FOOD PURCHASES AND MEAL TIMES?

Yes – some key trends around the eating times and buying patterns of overseas learners emerged. Most students had changed the times they ate and the ways in which they bought food since studying in the UK. This centred on the fact that meal times in the UK are much earlier than international students are used to.

“There is potential for market growth here. Findings highlight a potential for trialling longer opening hours and greater provision at weekends and non-term time.”

Jeremy Bushnell, Qa researcher

“In Malaysia dinner is at 9pm but now here it’s like 6pm!”

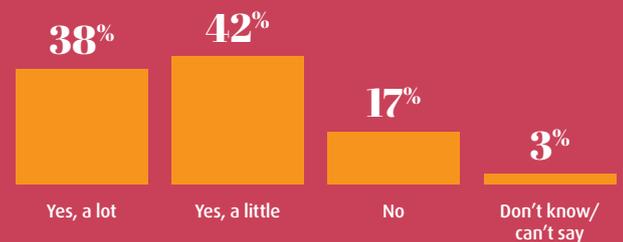
International student

One student from Spain expressed a view which many catered international students had – that they would often eat later, sometimes twice in the evenings:

“Normally we have lunch at half past two and dinner at half past ten! We are still not used to it, we are still eating later.”

International student

HAVE YOUR MEAL TIMES/EATING PATTERNS CHANGED SINCE STUDYING IN THE UK?



HOW FREQUENTLY DO INTERNATIONAL STUDENTS VISIT CAMPUS CAFES, RESTAURANTS OR SHOPS?



Not very often. Overseas learners are much more likely to eat breakfast, lunch and dinner at home than in university food outlets. The table below shows the mean frequencies given by respondents. This low average usage across all outlet types suggests that universities have the opportunity to win further custom from those international students who currently eat most of their meals at home.

OUTLET	BREAKFAST	LUNCH	DINNER
Uni restaurant	0.58	1.5	0.77
Uni café	0.58	1.06	0.23
SU inc. bars	0.11	0.67	0.36
Uni shop	0.44	0.91	0.43
Home / accom	5.71	4.42	5.84
Base: varies			

Around half (**58%**) of respondents said they had eaten from the university restaurant at least once in the last week. Just under half had used the university café (**48%**) and two fifths (**42%**) had used the university shop once in the past seven days.

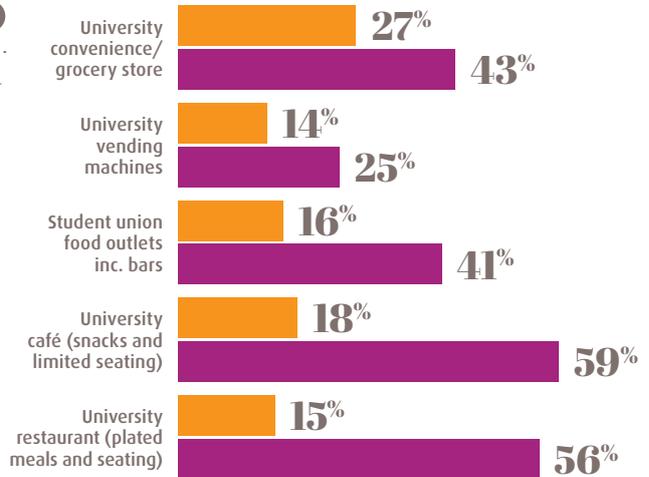
“You can’t get those [fruit] in the meal deal; you have to pay extra for a tiny cup!”

International student

WHICH UNIVERSITY FOOD OUTLETS DO YOU USE? ➤

International students do use a range of university outlets – the most popular in term time being the campus café. But no one outlet is used by more than 59% of students, indicating that measures could be taken to attract larger proportions of international students.

Non-term time ● Term time ●



WHAT WAS YOUR AVERAGE LUNCHTIME SPEND AND WHERE DO YOU EAT LUNCH? ▼

International students are most likely to use university outlets for lunch than any other meal. Around half (58%) said they had eaten lunch in the university restaurant at least once in the last week, 48% had bought lunch in the university café and 42% used the campus shop at lunchtime. However, most respondents (89%) had eaten lunch at home at least once in the last week.

Students reported that their average lunchtime spend on meals was between £4 and £7. For snacks that figure was between £0 and £5.

Snacks ● Meals ●



LUNCHTIME SNACKS VERSUS MEALS

“If they knew an outlet to be particularly slow or busy, students would avoid it because they didn’t have time to queue for a lengthy period. This is something which could be addressed as it seemed to be frustrating for international students, and could mean students are buying snacks rather than a full meal; therefore spending less.”

Vicky Peace, Qa researcher

HOW IMPORTANT ARE LOYALTY CARDS AND PROMOTIONS TO INTERNATIONAL STUDENTS?

Research showed that loyalty cards do encourage overseas learners to return to coffee shops. General discount days appealed, although feedback indicated that they wouldn't influence their decision of where to eat hugely. A high proportion of participants liked meal deals – they would make an active effort to go to an outlet if they offered a deal on a certain day. Seasonal discounts don't tend to appeal much.

WHICH OFFERS/PROMOTIONS DO YOU FIND MOST APPEALING?



Appealing ● Unappealing ●



WHAT IMPACT DOES RELIGION HAVE ON THE DECISIONS OVERSEAS STUDENTS MAKE ABOUT FOOD?

Many international students highlighted that they – or their friends – have dietary or religious requirements that influence their use of campus catering. The most common requirement was for people who only eat halal meat. Some universities did cater for this but other universities only did so in a limited way.

At universities where halal meat wasn't as prevalent, students said they wanted more hot food halal options across more outlets so they weren't restricted if eating with friends. Some respondents preferred to go into town centres where they had more options.

NON-RELIGIOUS DIETARY REQUIREMENTS

Research results showed that international students felt vegetarian options were satisfactory but options for vegan and gluten free meals were limited. Interestingly, this was an opinion shared by those with and without dietary requirements. Overall, students with dietary requirements wanted more choice.

HOW IMPORTANT IS ALCOHOL AS PART OF THE INTERNATIONAL STUDENT EXPERIENCE?

International students don't drink regularly. Just over half (55%) said they hardly ever or never have an alcoholic drink compared to a quarter (25%) who said they have a drink on most days or once a week at least.

When international students do drink, it is usually done at home. Most often they buy alcohol from a shop or supermarket to drink at home or they drink alcohol in the local pub. They are least likely to buy alcohol from a university shop or supermarket to drink at home.

“For the majority of students, alcohol provision was not a topic they were passionate about. One group did include a number of participants who did not drink, and for them alcohol was seen as a distraction from studies. Those who did drink were indifferent about alcohol being available on campus.”

Jeremy Bushnell, Qa researcher

DURING TERM TIME, HOW OFTEN DO YOU...?

Ever ● Never ●

“There is only one [outlet] on campus that is halal.”

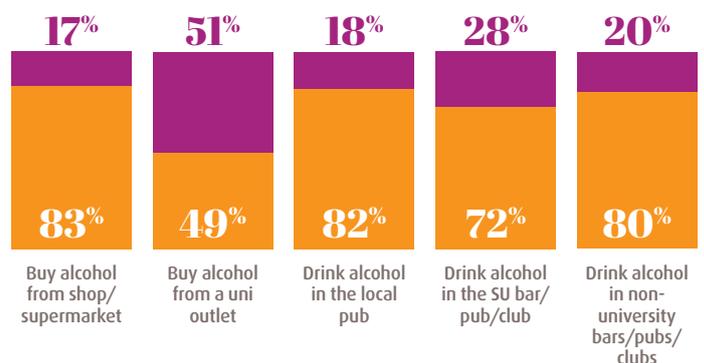
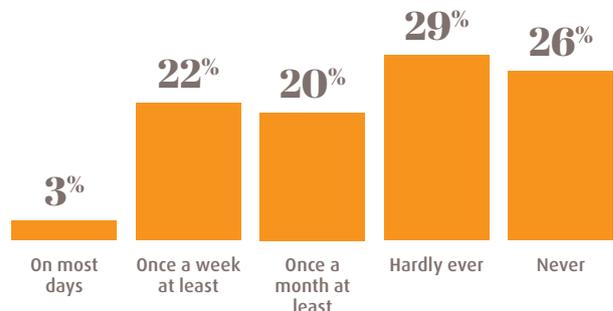
International student

“In Thailand some people have a religion where they cannot eat meat, like beef, it's hard for them to find food here.”

International student

“I'm slightly gluten intolerant, the bread here is much better than back home, it's less processed or something, but mainly lunch it's just sandwiches, which is fine I guess but it's either sandwiches, pasta or it's been breaded, so it's a little difficult.”

International student



HOW IMPORTANT ARE BRANDED OUTLETS TO INTERNATIONAL STUDENTS?

Branded outlets held little weight on campus, with international students in the discussion groups focussing much more on the value for money and atmosphere of an outlet as opposed to it being part of a chain.

Some students did feel it would be nice to have outlets such as Subway or Burger King on campus, but this was mainly linked to the affordable meal deals and saver menus these outlets have.

One or two universities were said to be providing coffee and snacks at a higher price than some of the branded outlets, and these students therefore did visit the branded outlets, such as Starbucks and Costa. Many did not seem interested in branded outlets. For some it was just because they do not like coffee, others seemed to be put off if they felt they were paying extra for a branded drink.

WHAT COOKING EQUIPMENT DO INTERNATIONAL STUDENTS NEED?

The majority of self-catered or part-catered students said they have all, most or some of the cooking equipment they need. Only 7% felt they have very little or none.

Interestingly, many of those students living in fully catered accommodation wanted to cook evening meals for themselves. This was because they were used to eating at much later times and most university catering providers stopped serving meals way before students were used to eating in their native countries. This left many respondents unsatisfied with evening catering, preferring to cook for themselves later on – and therefore possibly needing cooking equipment.



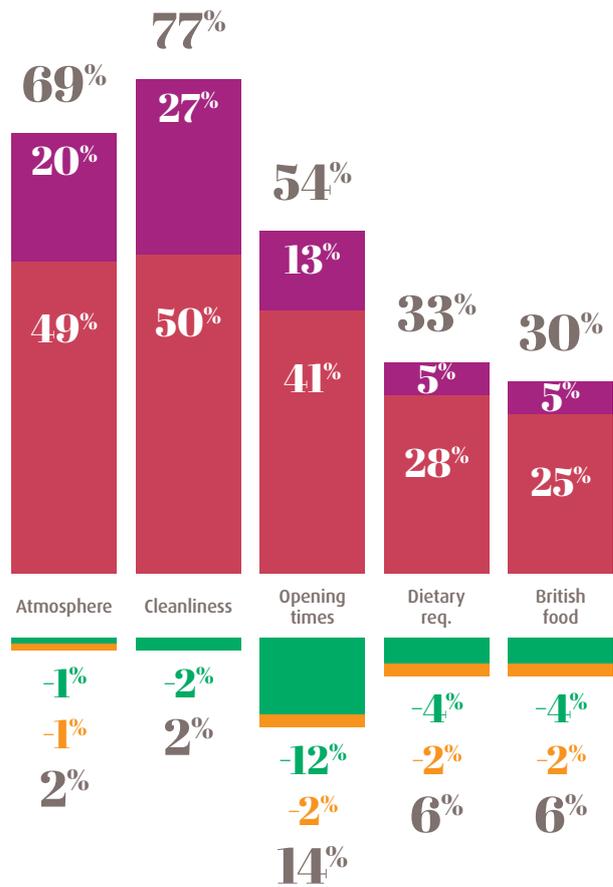
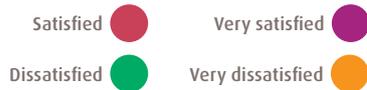
One size won't fit all

The international students who took part in the survey were varied, of different ages and at different stages, from a variety of nations, with assorted experiences of living abroad. International students belong to a range of diverse groups – one solution will not satisfy everyone.

OPPORTUNITIES FOR UNIVERSITIES

KEEP UP THE GOOD WORK

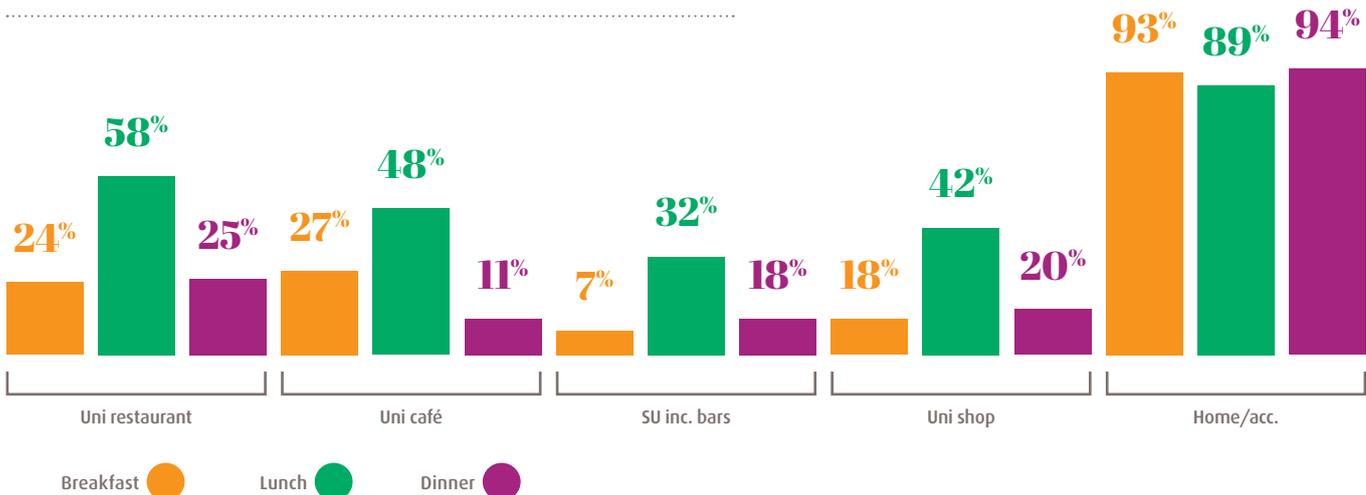
Students are satisfied with cleanliness, speed of service, staff friendliness, and atmosphere. It is recommended that caterers continue providing this level of satisfaction in these areas as they are recognised by the international student base as important factors. It helps them feel comfortable and confident when eating at university outlets.



INCREASE FREQUENCY OF PURCHASE

Most respondents live in self-catered accommodation and said they are open to trying new foods. The majority currently use university food outlets minimally, suggesting there is significant potential for customer growth if the right messages are communicated to overseas learners.

HOW FREQUENTLY ARE INTERNATIONAL STUDENTS EATING AT UNIVERSITY OUTLETS?



STEP UP 'DINNER' MARKETING – OPENING TIMES AND OPTIONS

UK meal times are a lot earlier than international students are used to. Lunch is the meal most likely to be eaten at university as it is convenient for the students. However, dinner is an important meal for overseas learners; telling us there is opportunity to market eating dinner at university to the students as being convenient (this might mean making dinner options available until later in the evening) and having a good range of food available.

DIETARY REQUIREMENTS – BETTER VARIETY AND LABELLING

A quick way to increase the appeal of university catering amongst international students would be to increase the range and improve the labelling of halal/gluten free meals on menus and at serving areas. This must be communicated to students in a way which appeals and encourages them to visit the outlets, especially those who have been studying longer.

Data indicates that students enjoy the social aspect of eating with friends, therefore attracting those with dietary requirements could also draw in their friends' custom too.

IMPROVE CHOICE, NOT AUTHENTICITY

Students want universities to provide a greater range of cuisines; rather than perfecting specific dishes from their home countries which UK university chefs may never get completely right.

For example, international students in the later stages of their studies may become bored with the repetitive nature of menus at the university restaurant.

To increase revenue from this cohort of students it would be useful to consider how to communicate choice and value for money. This could involve trialling a greater range of international dishes to students (including British meals) or holding international food weeks which could encourage students' use of different outlets.

“Halal labels, information on the menus not available, you always have to ask and then they say it's halal. But if it's there I can see it and order it. I have to go to the chef and ask him and then come back...it's so annoying!”

International student

“A bigger selection would be good... so you could build your own plate of food according to servings, depending on your budget and how hungry you are you can add items.”

International student

“It's good to have something different; we don't always want to eat our own foods, but to be honest I'm missing my home food now after three years. I wanted to try new things at first, but now I've eaten enough [of the food provided by university catering].”

Final year international student

“You could have one place that offers five different cuisines per week, so every day there is a different one.”

International student

“We have international occasions, so this week it is international week, there was Turkish food and others yesterday, it was good to try it and for the British students.”

International student



CHALLENGE PERCEPTIONS ABOUT BRITISH FOOD

There is a common view from international students that British food can be unhealthy in comparison to what they are used to eating in their home countries. Although data suggests that international learners do not have the greatest impression of British food, it also shows that they are open to finding out more.

As part of international food weeks, universities could trial a range of traditional British dishes which draw on cooking techniques that British caterers are confident with. It is important to offer traditional British foods as well as a taste of familiar overseas meals, to provide international students with a true “cultural exchange”.

OPEN LATER

International students feel that current opening times limit their ability to eat certain meals at university. It is important not to miss these students who, with some experience of being able to eat a later lunch or dinner, may be encouraged to eat more meals at university outlets. Universities could investigate the viability of opening later, promote this to international students and maintain extended hours depending on uptake.

BETTER RANGES IN CAMPUS SHOPS

Findings indicate that international students are particularly interested in cooking for themselves at home. It is recommended that universities introduce more international options for students to purchase in campus stores. The type of goods to stock would be dictated by the volume of students from particular nations and the availability of produce for those nationalities in nearby stores.

“Fruit and vegetable fayres appealed as some students had these once a week and they provided a better fruit and veg selection at a reasonable price. Students would also like to be able to get a better range of international foods from the university shops.”

Vicky Peace, Qa researcher

“In general, students seemed to associate British food with carbohydrate heavy, fast food; it was clear that most international students found this unappealing. Comments from South African and French respondents implied they feel that British students need more exposure to authentic world foods.”

Vicky Peace, Qa researcher

“Across all groups, international students struggled to determine what they felt British cuisine was, with the moderator needing to prompt once the initial mention of fish and chips had passed.”

Vicky Peace, Qa researcher

“In Tesco they have world food corner. If we have some opportunity to change the shop we can have some world food.”

International student

“...at the SU shop I discovered they sell some African food, which is quite useful.”

International student



VICKY PEACE

Vicky joined Qa Research after completing a BA in Law and Criminology and a Masters in International Criminal Justice, both from Sheffield Hallam University.

She has gained experience of conducting research with students via TUCO's Student Eating and Drinking Habits report and this research into Providing Catering for International Students.

Working on both projects has provided Vicky and Qa with valuable insight into the best methods for gathering the opinions of students around catering. The qualitative research completed via focus groups for this research really helped the researcher to unpick some of the important issues highlighted by the online survey which garnered more than 600 responses.

“It was great to have such a good response to the research; the universities we spoke with were all really helpful and were crucial to getting the word out to their international student body. Holding focus groups at six of the universities with students from all over the world was really interesting and I hope the findings can be of use to TUCO and their members.”



JEREMY BUSHNELL

Jeremy studied sociology at the University of York and his chosen research involved surveying students and moderating student focus groups, so this is an audience group he is used to engaging with through research.

Jeremy enjoys talking to people from all walks of life and early on in his research career he completed over 150 interviews with vulnerable groups.

“Seeing the survey responses come in was a fascinating experience. It showed how important food is when assimilating to a new culture. The focus groups were a joy to conduct and learning about individuals' experiences of catering showed how the catering provision can have a very big impact on the life of an international student.”

This research was undertaken in two parts: a quantitative survey conducted online and follow-up qualitative research in the form of focus groups.

Quantitative method

PILOT SURVEY

Survey questions were tested on international students at Sheffield Hallam University. As a result, changes were made where students highlighted issues – for example language used.

ONLINE SURVEY

International students who attended TUCO member universities were targeted. The Higher Education Statistics Agency (HESA) definition of an international student was used:

“An ‘international student’ is someone who has come to the UK to study and will be in the UK only for the period of their studies.”

TUCO sent out letters to eight regional chairs so they could disseminate survey information to members. These universities were then contacted by Qa researchers via phone and email. Links to the survey were sent out to 96 TUCO member universities (plus 30 Oxford colleges). Entry in a free cash prize draw was used as an incentive for students to take part.

The online survey gathered **636** responses. In research terms this means it is possible to be 95% confident that the data has a margin of error of no more than +/- 4%.

SURVEY COMPLETIONS BY NATIONALITY

Qa used the HESA website to compile the most up to date numbers of international students studying in the UK by nationality. The table below shows the percentage of students studying in the UK, along with completed surveys from this research. This demonstrates the sample in this research broadly reflects the picture and make-up of international students studying in the UK.

STUDENT HOME NATION	CURRENT % OF STUDENT POPULATION	ACHIEVED % IN SAMPLE
China	20	24
India	5	5
Nigeria	4	5
Malaysia	4	7
USA	4	6
Hong Kong	3	0
Germany	3	2
France	3	1
Ireland	3	0
Greece	2	0
Cyprus	2	1
Italy	2	1
Saudi Arabia	2	1
Singapore	2	2
Pakistan	2	1
Spain	2	2
Romania	1	0
Bulgaria	1	0
Canada	1	1
Poland	1	0
All other EU	8	9
All other non-EU	28	31

WHICH UNIVERSITY ARE YOU STUDYING AT? ➤

The survey asked students which university they attend. The table on the right shows the number of students from each university and each institution's proportion of the survey sample. Surrey, Reading and Lincoln had the highest number of students responding.

Strict quotas were not applied to respondents' universities as it wasn't known which universities would be taking part. Researchers wanted to give all students the opportunity to complete the survey. The overall findings are a reflection of those students who took part, with some universities having more influence on the data than others.

QUALITATIVE METHOD

The qualitative side of this research enabled researchers to delve deeper into some of the opinions and feelings behind what international students indicated in the quantitative survey.

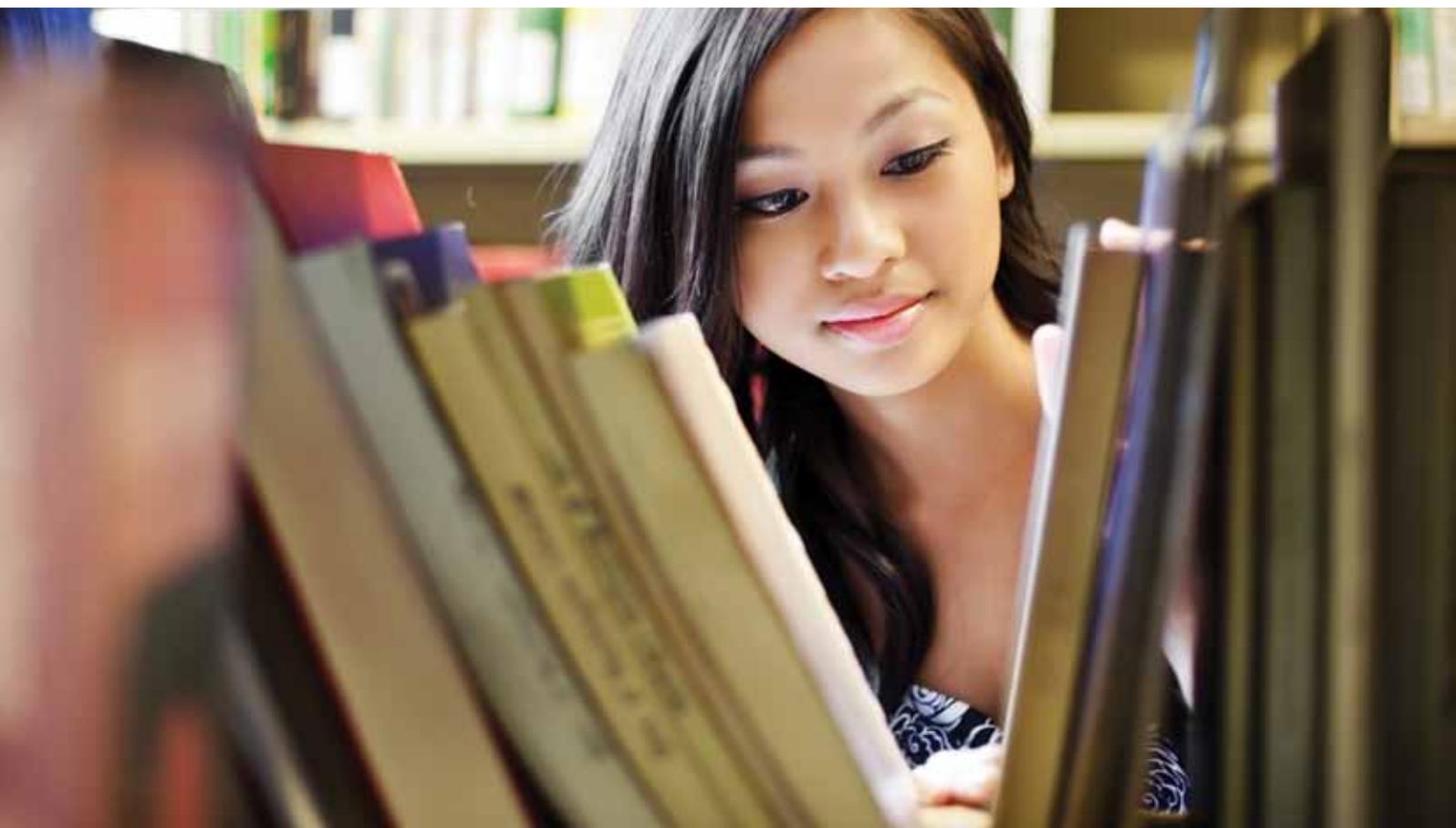
Universities with the highest volume of completed surveys were selected as locations for focus groups: Cardiff, Edge Hill, Lincoln, Nottingham, Reading and Surrey.

The sample provided a good mix of universities and geographic locations. Each student attending the group was offered a cash incentive of £20. Participants were chosen on their nationality and gender to ensure an even representation. A total of 70 international students from 39 countries attending six universities were involved in the focus groups.

UNIVERSITY	COUNT	PERCENTAGE
Surrey	193	30%
Reading	164	26%
Lincoln	127	20%
Nottingham	82	13%
Edge Hill	26	4%
Cardiff	13	2%
Portsmouth	5	1%
University for the Creative Arts	5	1%
Winchester	4	1%
Wolverhampton	6	1%
Wolverhampton Intern. Academy	4	1%
Goldsmiths, University of London	1	0%
Greenwich	1	0%
Imperial College London	3	0%
Oxford	2	0%

Base: 636

Further details on the research methodology is available at www.tuco.org/grow



TUCO is the leading professional membership body for in-house caterers operating in the higher and further education sector. A total of 340 universities and colleges use our services every year. We also support in-house catering teams in the wider public sector, including 28 local authorities and four NHS Trusts.

We are committed to advancing the learning and development of catering and hospitality teams, and we work to boost quality standards and provide essential market advice and information to those working in the sector.

TUCO is no longer just a purchasing consortium. We have responded to the changing needs of our members and now provide like-minded individuals with a place to go to share their values. From running conferences, competitions, study tours and courses, to researching and providing the tools needed to help institutions get better at what they do, TUCO has grown into a bespoke membership organisation.

Membership is open to all in-house catering operations in the higher and further education sector. If you are not a further or higher education institution then it is still possible for you to join TUCO. Please email info@tuc.org for more details.

**For more details about TUCO call 0161 713 3420 or email info@tuc.org or visit www.tuc.org
For a full version of this research report visit www.tuc.org/grow**

