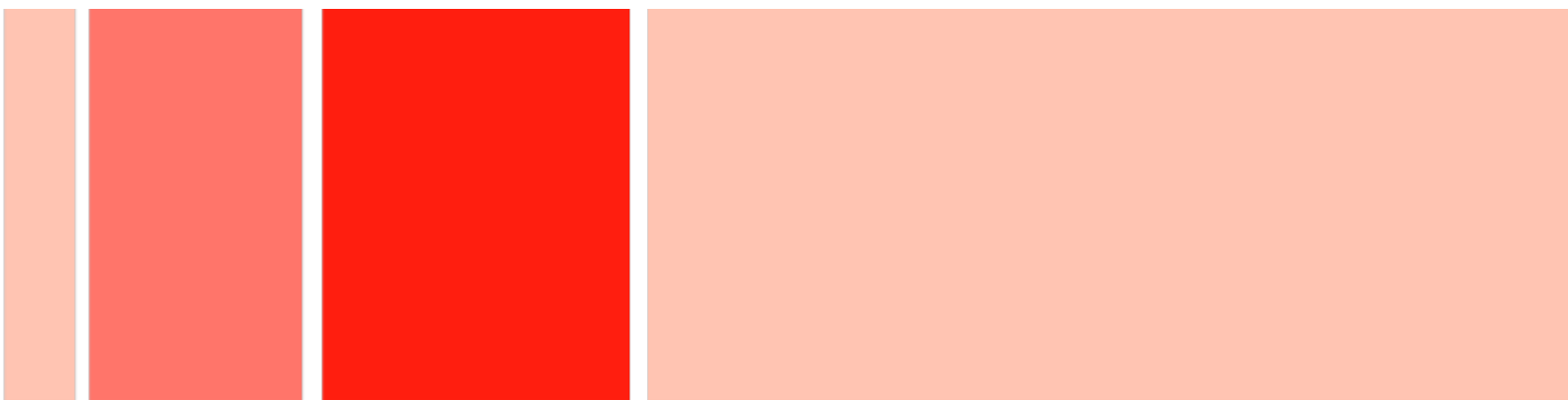


Social research number: 91/2026

Publication date: 13/10/2026

Evaluation of Welsh Government's Universal Primary Free School Meals Policy: second interim report



Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

OGL © Crown Copyright Digital ISBN 978-1-80853-339-6

Evaluation of Welsh Government's Universal Primary Free School Meals Policy: second interim report

Authors: Haysey, Nicola; Smiles, Beth; Cooper, Priya; Kettle, Ellie; Diaz, Dr Alice; Harding, Ryan; Charalambous, Steph

Full Research Report: Haysey, N, Smiles, B, Cooper, P, Kettle, E, Diaz, A, Harding, R, Charalambous, S. (2026). Evaluation of Welsh Government's Universal Primary Free School Meals Policy: second interim report. Cardiff: Welsh Government, GSR report number 91/2026.

This report can be found on the Statistics and research pages of the Welsh Government website: <https://www.gov.wales/statistics-and-research>

Views expressed in this report are those of the researcher and not necessarily those of the Welsh Government

For further information please contact:

Schools Research Branch

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

Tel: 0300 025 8099

Email: SchoolsResearch@gov.wales

Table of contents

List of tables.....	3
List of figures.....	4
Glossary.....	6
1. Introduction and background.....	7
1.1. Policy context	7
1.1.1. Policy implementation.....	8
1.1.2. eFSM.....	8
1.1.3. Healthy eating regulations	9
1.2. Aims and objectives of the evaluation	10
1.3. Report structure	10
2. Survey methodology.....	10
2.1. Parent and carer survey distribution	11
2.2. Sampling approach.....	11
2.3. Survey design	11
2.4. Analysis	12
2.5. Presentation of findings	12
2.6. Limitations	13
3. Respondent profile	14
3.1. Background of respondents.....	14
3.1.1. Household characteristics	14
3.1.2. Learner characteristics	14
3.1.3. Means-tested free school meal eligibility	15
3.1.4. School location	15
3.1.5. Equality characteristics.....	15
3.2. Awareness and support for the policy.....	15
4. Discussion on findings.....	16
4.1. What factors affect uptake of UPFSM?.....	17
4.1.1. Overview of uptake and participation in school meals	18
4.1.2. Drivers of uptake	22
4.1.3. Barriers to uptake	25
4.2. What impact has the policy had on children's health and wellbeing?	27

4.2.1.	Health and nutritional quality of school meals	27
4.2.2.	Perceptions on the impact of UPFSM on children's health and wellbeing	29
4.3.	What are the emerging impacts of the policy on school life?	31
4.3.1.	Impact on lunchtime experience	32
4.3.2.	Impact on the rest of the school day	38
4.4.	What impact has the policy had on families?	39
4.4.1.	Financial savings	39
4.4.2.	Impacts on family life	43
5.	Conclusions	44
5.1.	Summary of main findings	44
5.2.	Reflections	45
5.3.	Next steps	46
Annex 1:	Methodological annex	47
Annex 1.1:	Survey design	47
Annex 1.2:	Survey distribution and limitations	47
Annex 1.3:	Survey analysis	48
Annex 2:	Survey response profile	49
Annex 3	Statistical tests	53
Annex 3.1:	Introduction	53
Annex 3.2:	Methods	53
Annex 4:	Survey script	54

List of tables

Table 1: responses to the question “why do you, as a family, choose school lunches, whether every day or on selected days?” by household income (n=1,157).....	24
Table 2: survey responses per LA	50
Table 3: survey responses per whether the learner has ALN	51
Table 4: survey responses per whether the learner is eligible for means tested FSM (eFSM)	51
Table 5: survey responses per whether the learner attends an urban or rural school.....	52
Table 6: survey responses per household income, before tax and including benefits	52

List of figures

Figure 1: responses to the question “on average, how many school lunches does your child eat each week?” (n=1,517).....	19
Figure 2: responses to the question “on average, how many school lunches does your child eat each week?” by year group	20
Figure 3: responses to the question “overall, has the number of school lunches that your child has each week changed since the UPFSM policy was implemented?” by household income (n=796).....	21
Figure 4: responses to the question “why do you, as a family, choose school lunches, whether every day or on selected days?” (n=1,403)	23
Figure 5: responses to the question “why do you, as a family, choose not to have school lunches, whether every day or on selected days?” (n=636)	25
Figure 6: responses to the question “overall, how would you rate the school lunches on offer at your child’s school in terms of health and nutrition?” (n=1,517)	28
Figure 7: responses to the question “what impacts, if any, do you think the introduction of the UPFSM policy has had on the health and wellbeing of your child?” (n=1,517)..	29
Figure 8: responses to the question “what impacts, if any, do you think the introduction of the UPFSM policy has had on the health and wellbeing of your child?” by household income	31
Figure 9: responses to the question “has your child mentioned any changes to the following since UPFSM was introduced” (n=1,517).....	34
Figure 10: responses to the question “has your child mentioned any changes to the following since UPFSM was introduced: catering for specific dietary needs (e.g. allergies or sensory issues)” by specific dietary need	37
Figure 11: responses to the question “has the availability of a free school lunch had an impact on your family finances? (e.g. cost savings from not having to prepare packed lunches and/or pay for a school meal)” (n=1,517)	39
Figure 12: responses to the question “approximately how much money do you now save each week from preparing fewer packed lunches?” and “approximately how much money do you now save each week from preparing fewer packed lunches?” where the respondents indicated saving through both methods (n=419).....	41
Figure 13: responses to the question “approximately how much money do you now save each week from preparing fewer packed lunches?” and “approximately how much	

money do you now save each week from preparing fewer packed lunches?" where
respondents indicated saving through only 1 method 42

Glossary

ALN

Additional learning needs

eFSM

Income-related eligibility for free school meals

FSM

Free School Meals

LA

Local Authority

PDG

Pupil Development Grant

ToC

Theory of Change

TP

Transitional protection

UPFSM

Universal Primary Free School Meals

UK

United Kingdom

WG

Welsh Government

1. Introduction and background

This report presents findings from a survey of parents and carers undertaken between October and December 2025, as part of the Welsh Government's evaluation of the Universal Primary Free School Meals (UPFSM) policy. The survey received responses from parents and carers of children attending local authority (LA) maintained primary schools across Wales. It explored awareness of the policy, patterns of school meal uptake and perceived impacts on learners, school life and families. The findings presented provide evidence on parent and carer experiences of UPFSM following the completion of the national rollout of the policy.

1.1. Policy context

The Welsh Government's commitment to UPFSM was announced in December 2021 and set out in the Cooperation Agreement between Labour and Plaid Cymru ([Cooperation Agreement](#)). The policy emerged in response to growing concerns about food insecurity and the rising cost of living, both of which were exacerbated by the coronavirus (COVID-19) pandemic. During periods of school closures and holidays, many learners faced food insecurity, highlighting the need for more reliable and accessible food provision. UPFSM has since become a nationally embedded entitlement for all primary-aged learners attending LA maintained schools in Wales, with continued funding set out within the 2026 to 2027 budget to support the policy's continuation.

At the point UPFSM was introduced, the income threshold for income-related means-tested free school meals (eFSM) had not been updated since 2019. This frozen threshold was believed to have contributed to a continued decline in the number of children qualifying for eFSM in Wales ([Free school meals in Wales](#)). For many families, eligibility was only maintained through transitional protection (TP) – a safeguard introduced when eligibility criteria changed, allowing children who previously qualified for eFSM to retain their entitlement, even if their household circumstances later moved above the threshold. TP ended on 1 January 2024, though learners eligible before this date were able to receive free school meals until the end of their current phase of education.

The political landscape influenced the policy's development, with LAs eager to implement changes quickly to benefit families. The initiative was also framed within the broader context of recommendations from the Annual Report of the Children's Commissioner for Wales (2020 to 2021) ([Children's Commissioner for Wales Annual Report 2020/21](#)), which urged a review of food entitlements in schools, including eFSM. There was also alignment between the Welsh Government's commitment to this policy and its broader governmental objectives in child poverty, healthier lifestyles and the wellbeing of future generations ([The Well-being of Future Generations](#)). UPFSM was part of Welsh Government's approach to tackling food insecurity in childhood and its associated challenges. The policy also aimed to deliver wider economic benefits by using investment in the Welsh school food system to strengthen local supply chains, build resilience and increase scale ([Foundational Economy programme](#)).

Following the Senedd election in May 2026, the policy landscape continued to evolve under a Plaid Cymru-led Welsh Government. While maintaining support for UPFSM, the new

government signalled its intention to build on the policy through a broader expansion of free school meal provision. In June 2026, an additional £15 million investment to extend eligibility to secondary school learners in households receiving Universal Credit was announced, with the phased removal of the existing income threshold ([£15m investment in free school meals for eligible secondary pupils](#)). This positions UPFSM as part of a wider programme of action to improve access to school food and tackle child poverty.

1.1.1. Policy implementation

The UPFSM policy was rolled out in phases, beginning in September 2022, with the youngest primary school learners (Reception, Year 1 and Year 2) before being extended to older year groups. This phased rollout was developed in collaboration with LAs to ensure that the expansion could be delivered safely and consistently across Wales. To support this, the Welsh Government set national milestones and minimum standards, establishing a shared baseline of provision. This meant all LAs were required to reach at least the same minimum level of delivery at the same time. While some LAs were able to progress more quickly, this approach limited large disparities in access and ensured no area was left behind. Younger children were prioritised because they were statistically more likely to be living in relative income poverty. As a result, the first cohort eligible for UPFSM in Wales were children born on or after 1 September 2018 ([Relative income poverty: April 2019 to March 2020](#)).

1.1.2. eFSM

While all LA maintained primary schools in Wales can now access the UPFSM offer, a learner may be entitled to income-related means-tested free school meals (eFSM) ([Free school meals: information for local authorities and schools](#)). Eligibility stems from whether the parent/carers receives 1 or more of the following:

- income support
- income-based jobseeker's allowance
- income-related employment and support allowance
- support under part VI of the Immigration and Asylum Act 1999
- guaranteed element of Pension Credit
- Universal Credit (as long as the annual net earned household income is less than £7,400, not including benefits)

eFSM numbers contribute to how the Pupil Development Grant (PDG) is allocated ([Pupil Development Grant \(PDG\): overview](#)). Use of grant funding focuses on 8 main areas:

- high-quality learning and teaching
- Community Focused Schools
- early childhood play, learning and care

- high aspirations supported by strong relationships
- health and wellbeing
- leadership
- Curriculum for Wales and qualifications
- supporting post-16 progression

PDG funding is paid directly to LAs and primarily distributed to schools, with some funding also used to support children looked after by LAs, which work closely with schools to ensure that the grant is used for its intended purposes, as outlined above.

eFSM eligibility is also the main route through which families can access the Welsh Government's School Essentials Grant (SEG) ([School Essentials Grant: help with school costs](#)). The SEG helps families with the cost of school uniforms, equipment and other items needed for school.

1.1.3. Healthy eating regulations

All primary schools in Wales are subject to the 2013 Healthy Eating Regulations ([Healthy Eating Regulations](#)). The regulations set out nutritional standards and food and drink requirements throughout the school day as well as for an average lunch. Between May and July 2025, the Welsh Government held a consultation on healthy eating in schools, with the view to update what food and drinks can be provided in schools and the guidance and responsibilities for promoting healthy eating and drinking ([Healthy eating in schools](#)). At the time of writing, the revised Healthy Eating Regulations for maintained nursery and primary schools ([The Healthy Eating in Schools regulations 2025](#)) have been laid before the Senedd (17 December 2025) and are due to come into effect on the 31 October 2026.

Notable changes to the regulations include the range of certain foods and increased frequency of fruit and vegetables alongside limits on fried foods, high-sugar desserts and processed meat. For example, at least 2 portions of vegetables must be provided each day, with at least 6 different vegetables being provided each week. Similarly, at least 1 portion of fruit must be provided each day, with at least 4 different fruits being provided each week.

The updated Healthy Eating Regulations will likely affect the delivery and impact of the UPFSM policy in Wales. On the one hand, by revising nutritional standards, the regulations aim to improve the nutritional content of the food and drink served, which supports the policy's wider objectives of improving children's health and wellbeing. On the other hand, the changes may have practical implications for LAs, schools and catering providers delivering UPFSM, including adjustments to menus, procurement and kitchen operations. As the regulations come into force from October 2026, the extent to which implementation challenges, such as cost pressures, supply chain constraints or workforce capacity, are managed, alongside how learners respond to the revised menus and any resulting changes in uptake, will be an important consideration in the final stage of this evaluation.

1.2. Aims and objectives of the evaluation

In September 2024, the previous Welsh Government commissioned ICF Consulting Services Ltd. (ICF) in partnership with Arad Research to design and deliver an evaluation of the UPFSM policy. The evaluation aims to provide comprehensive evidence on the implementation, early impacts and longer-term potential of the policy.

The first phase of the evaluation, conducted between January and September 2025, focused on policy preparation and rollout. Findings from this phase were presented in an Interim Report (hereafter referred to as the first Interim Report) ([Evaluation of Welsh Government's Universal Free School Meals Policy: Interim Report](#)). This report, published in February 2026, summarised findings from fieldwork which took place and examined early implementation experiences, emerging impacts and lessons for ongoing delivery. It drew on evidence collected through:

- 39 semi-structured interviews with local authority representatives, school food providers and wider stakeholders
- 13 in-depth school case studies across 7 local authorities
- a school survey for senior leaders

This second Interim Report builds on the first Interim Report's findings by presenting evidence from a parent and carer survey completed between October and December 2025. It focuses on parent and carer perspectives of UPFSM including awareness, experiences of access and uptake, perceived benefits and any barriers that remain. These findings add to the wider evidence base on how the policy is operating now that national rollout has been completed.

1.3. Report structure

The remainder of this report describes the methodology, findings and conclusions drawn from the parent and carer survey. It is structured as follows:

- Chapter 2 describes the parent and carer survey methodology and highlights any limitations
- Chapter 3 outlines the profile of survey respondents
- Chapter 4 presents a discussion on the survey findings
- Chapter 5 concludes the report and sets next steps for the evaluation

2. Survey methodology

The primary data collection activity which contributes to this report is the parent and carer survey which received 1,517 responses and aimed to gather views of parents and carers on the UPFSM policy.

2.1. Parent and carer survey distribution

The parent and carer survey was launched on 7 October 2025 and closed on 10 December 2025. LA maintained primary schools in Wales were invited to share the survey with parents and carers through communication channels including as email, newsletters or digital platforms. A total of 3 email reminders were issued during this period to schools where there had been no response. Responses were received from 136 schools which represents 11% of the LA maintained primary schools in Wales.

The survey was available online and bilingually in Welsh and English. Almost all (98%) of respondents completed the survey in English. Participation was voluntary and responses were anonymous.

2.2. Sampling approach

All 1,199 LA maintained primary schools, including special schools with primary aged learners, in Wales were invited to take part in the survey. This open distribution approach was intended to maximise opportunities for participation across Wales.

The survey did not use a random or stratified sample. Findings should therefore not be treated as statistically representative of all parents and carers in Wales. As with all voluntary surveys, those who chose to respond may differ from those who did not respond. For example, respondents may have had stronger views on the policy or greater engagement with school communications.

Responses were monitored throughout the fieldwork period to encourage broad geographic coverage. However, response volumes varied considerably across LAs. This means that some findings for particular groups or LAs areas are based on a larger number of responses than others and should therefore be interpreted with caution.

2.3. Survey design

The questionnaire was informed by the evaluation's Theory of Change (ToC) and focused on issues most relevant to parents and carers. It included mainly closed questions, alongside a number of optional open-text questions where respondents could provide further detail.

Questions covered the following themes:

- household and learner characteristics
- awareness of the policy
- the impact of the policy on school life
- the impact of the policy on child health and wellbeing
- the impact of the policy on families

The survey was tested internally within ICF and Arad Research prior to launch to ensure questions were clear and accessible.

2.4. Analysis

Survey data were cleaned and analysed using standard quantitative methods. Descriptive statistics were produced to summarise response patterns. Comparative analysis was also undertaken for selected groups, including:

- learners with and without additional learning needs (ALN)
- learners eligible and not eligible for income-related means-tested free school meals (eFSM)
- learners attending rural and urban schools
- households with different income levels

Where appropriate, statistical testing was undertaken to identify meaningful differences between groups. Full results of statistical testing are provided in Annex B.

Responses to open-text questions were analysed thematically to identify common views, experiences and suggestions. Inter-coder reliability checks were conducted to ensure consistency in analysis across questions.

2.5. Presentation of findings

Throughout the report, terms such as ‘a great majority’, ‘a small minority’ and ‘a few’ are periodically referred to. The number of respondents this describes is relative to the sample referred to. The following descriptors are used to indicate the proportion of respondents:

- all respondents: 100%
- nearly all respondents: 90% to 99%
- a great majority of respondents: 75% to 89%
- a majority of respondents: 51% to 74%
- over half of respondents: 51% to 55%
- half of respondents: 50%
- almost half of respondents: 45% to 49%
- a minority of respondents: 25% to 44%
- a small minority of respondents: 10% to 24%
- a few respondents: 0% to 9%

Percentages presented throughout the report are based on those who answered each question. Percentages may not always sum to 100 due to rounding or where respondents could select more than 1 answer.

Differences between groups that are described as statistically significance were tested at the 95% confidence level ($p < 0.05$) using a chi-squared test of independence. Where differences in the strength of association or distribution are discussed, these were assessed using Cramér's V. Further details on statistical testing are provided in Annex 3.

Open-text responses have not been quantified. Instead, descriptive terms are used to give a general indication of how commonly a theme arose within the written responses. Selected anonymised quotations are included to illustrate themes and provide examples of parents' and carers' views. However, they do not indicate how widely a particular view was held. Insights from written responses are presented alongside the statistical results to provide additional context and help explain the findings, rather than provide a representative measure of respondents' views.

The report uses the term 'school meal' to refer to the lunchtime meal served in primary schools. This reflects the language used in the UPFSM policy, but it is worth noting that parents and carers sometimes referred to this meal using alternative terms such as 'school dinner' or 'school lunch'. The term 'school lunch' was also used in the parent and carer survey questionnaire to distinguish the lunchtime meal from other forms of food provision available in schools and is therefore retained when referring to survey questions and responses.

2.6. Limitations

The survey that informs this report was not designed to be representative of the parent and carer population in Wales. Findings should therefore be interpreted as reflecting the views of survey respondents rather than those of all parents and carers nationally.

Findings also reflect parent and carer perceptions of how UPFSM has affected their child and household, rather than providing a direct measure of a child's experiences or outcomes. In many cases, respondents were also asked to comment on aspects of school life that they do not directly observe, such as lunchtime environment and learner experiences during the school day. Responses should therefore be interpreted with caution, as they reflect parents' and carers' understanding of these issues, often based on information shared by their child rather than direct observation.

Open-text responses were optional and were not completed by all respondents. Findings from written responses may therefore not reflect the views of all respondents and will not always align exactly with quantitative findings. For example, respondents with particularly strong views may have been more likely to provide written comments.

3. Respondent profile

This Chapter provides an overview of the parents and carers who completed the survey. Understanding the profile of respondents helps to contextualise the findings presented in later chapters. Detailed tables are provided in Annex 2.

3.1. Background of respondents

Responses were submitted from parents and carers across 19 LAs across Wales, although participation levels varied considerably between LAs. The largest numbers of responses were received from Rhondda Cynon Taf (347), Cardiff (280), Newport (240) and Merthyr Tydfil (159). No completed responses were received from Carmarthenshire, Ceredigion or Swansea. As set out in Chapter 2, findings should therefore be interpreted as reflecting the views of respondents rather than all parents and carers in Wales.

3.1.1. Household characteristics

The majority of respondents had 1 child currently attending primary school (66%). Around 3 in 10 (30%) had 2 children in primary school, and a few respondents had 3 or more. Where respondents had more than 1 child attending primary school, they were asked to answer questions in relation to their eldest child.

The majority of respondents (74%) lived in households with 2 parents or carers, while around a quarter (23%) were single-parent or single-carer households.

Household incomes varied across respondents. One-third of respondents (33%) reported an annual household income of over £50,000 before tax and excluding benefits, while a similar proportion (31%) reported an annual household income of between £20,001 and £50,000. A further 18% reported an annual income of £20,000 or less, and 18% preferred not to disclose their income.

3.1.2. Learner characteristics

Responses were received in relation to learners across all primary school year groups. Representation was relatively even across year groups, although overall two-thirds of responses (66%) related to learners in Years 3 to 6.

A great majority of respondents (83%) reported that their child did not have ALN, while 11% reported that their child has ALN. A few respondents said they did not know or preferred not to say. Almost 9 in 10 respondents (88%) said their child did not have specific dietary requirements. Among those who did report dietary needs, these included allergies, vegetarian diets, religious requirements and specific medical needs.

3.1.3. Means-tested free school meal eligibility

Respondents were asked whether their child was eligible for income-related means-tested FSM (eFSM). A minority (29%) reported that their child was eligible, while 6 in 10 (62%) said they were not eligible. A few respondents (8%) said they did not know.

This distinction is relevant because some families who were not previously eligible for income-related means-tested FSM may have experienced UPFSM differently from families already receiving free school meals before the policy was introduced.

3.1.4. School location

Where respondents identified their child's school, responses were matched to rural and urban classifications. Based on this, nearly three quarters of responses (73%) related to learners attending urban schools and a quarter (25%) related to learners attending rural schools. A small number of respondents did not provide enough information for classification.

3.1.5. Equality characteristics

Nearly all respondents (90%) identified as being from a White ethnic background (Welsh, English, Scottish, Northern Irish or British; Any other White background). Around 8 in 10 (81%) said they did not consider themselves to have a disability, impairment or long-term health condition. As with other profile information, these characteristics should be considered when interpreting findings, as some groups are more strongly represented in the survey than others.

3.2. Awareness and support for the policy

Nearly all respondents (98%) reported that they were aware of the UPFSM policy.

When asked for their views on the policy, most provided positive feedback, welcoming the provision of a free school meal during the day. Many of these responses expressed general support, describing UPFSM as a "good idea" or using positive terms such as "great", "brilliant" or "fantastic".

More detailed support for the policy was often linked to 3 broad themes (explored later in this report):

- fairness and equal access
- benefits for learners
- financial support for families

Several respondents suggested extending free school meals to secondary schools, citing increased costs and greater financial pressure when learners move to secondary education, particularly for working families or those with more than 1 child. This echoes findings from the first Interim Report, which highlighted the absence of secondary school provision as a concern.

“This is such a good scheme, wish it was extended to high school. Children in high school also need this scheme.” Survey respondent

A minority of respondents expressed mixed or negative views about the policy. Mixed responses often supported the principle of UPFSM while raising concerns about delivery or value for money. The most commonly reported concerns (explored later in this report) related to:

- food quality
- limited menu choice
- portion sizes
- suitability for learners with dietary or sensory needs

The few respondents with exclusively negative views commonly questioned whether universal provision was the best use of public funding, raising concerns that it was inefficient or unnecessary for families able to pay. Some supported a return to means testing to better target resources or improve meal quality. A smaller number raised broader objections, including concerns about fairness, misuse and financial sustainability for schools and LAs.

“I think money could be spent better elsewhere. I feel that since this has been offered the standard & quality of food has gone down.” Survey respondent

4. Discussion on findings

Chapter 4 examines parents’ and carers’ perceptions of school meal uptake and the potential emerging impacts of the UPFSM policy. It begins by outlining how many school meals learners are reported to eat each week, how this has changed since the introduction of UPFSM, and the factors that influence families’ decisions to choose a school meal.

The chapter then explores perceived impacts of the policy on learners, school life and families. First, it considers impacts on learner health and wellbeing, including access to nutritious meals, energy levels, concentration and broader social outcomes. Second, it examines emerging impacts on school life, such as learner enjoyment of lunchtimes, the dining environment and the wider school day. Finally, it explores impacts on families, particularly in relation to financial pressures, time savings and changes to family life at home.

4.1. What factors affect uptake of UPFSM?

This sub-section explores how many learners take up school meals, how this has changed since UPFSM was introduced and the reasons families give for choosing or not choosing school meals. It describes patterns at the time of the survey and reported changes since the policy began, rather than measuring change against a pre-implementation baseline.

UPFSM is intended to remove cost as a barrier and make school meals easier to access. However, uptake also depends on factors such as menu choice, food quality and learner preferences. As part of this evaluation, school meal uptake has been examined as an important factor in understanding how the policy is working in practice. This is because uptake is the main mechanism through which wider benefits are expected to arise, including impacts on learner health and wellbeing (Chapter 4.2), learning and engagement (Chapter 4.3) and family finances (Chapter 4.4). Understanding who takes up school meals, how regularly they do so, and what influences these decisions is therefore essential to assessing whether UPFSM is creating the conditions for longer-term impact.

The survey findings indicate that UPFSM is encouraging high overall levels of school meal uptake among respondents, particularly across younger learners and families on middle- to higher-incomes. These findings are broadly consistent with administrative data reported in the first Interim Report which showed average school meal uptake across Wales increasing from 67% in September 2022 to 69% in July 2024. While this increase was relatively modest in percentage-point terms, it indicates that uptake was maintained at a high level and increased during the period of UPFSM rollout.

However, survey findings show that participation remains slightly lower among respondents from the most socio-economically disadvantaged households. There was a statistically significant difference in reported changes in school meal uptake between learners from the lowest income households and all other income groups, with respondents from the lowest-income households less likely to report that their school meal uptake had increased and more likely to report that it had decreased. This suggests that, among survey respondents, the reported positive changes in school meal uptake following the introduction of UPFSM may not have been experienced equally across all income groups.

Nevertheless, the findings show that reported uptake among learners from low-income families was higher in younger year groups than in older ones. This may indicate the early stages of a change in participation patterns. However, as these data are cross-sectional, it is not possible to determine whether this reflects a cohort effect or age-related differences in school meal use. If these patterns are sustained as learners move up through year groups, they could contribute to higher uptake over time.

Survey respondents mostly commonly reported that the main reason for choosing a school meal was because it was free, while limited menu choice was the most frequently reported barrier to uptake. Respondents across income groups generally identified similar reasons for choosing or not choosing school meals, although those from lower-income households tended to place less emphasis on these factors overall. These findings suggest that, among

survey respondents, school meals were generally seen as a practical and acceptable option rather than one that families actively chose to avoid.

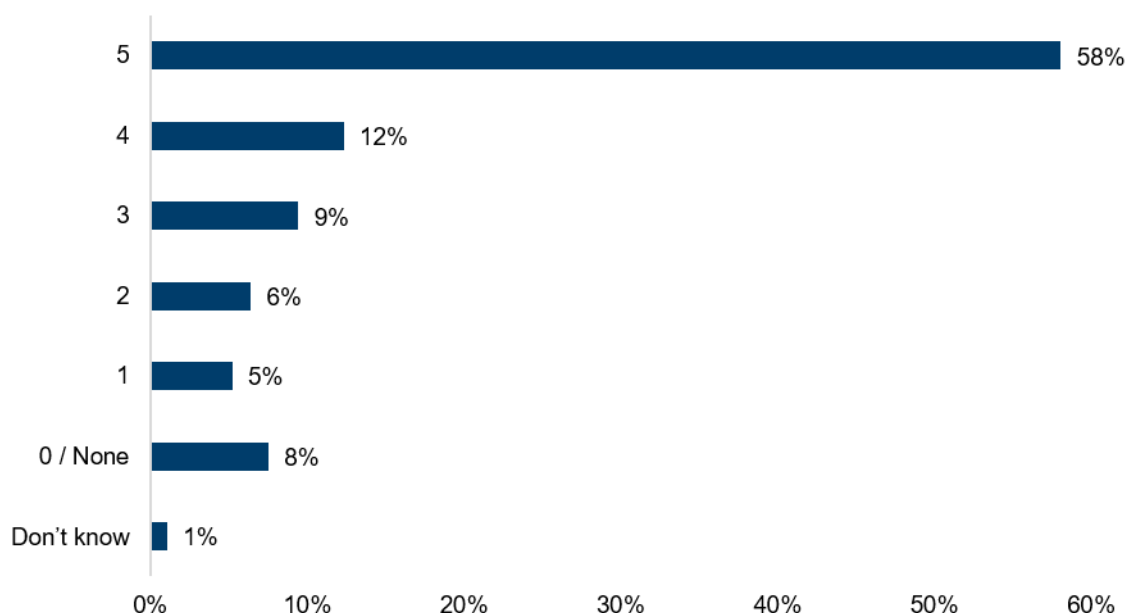
The survey findings therefore suggest that the cost of a school meal is not the only driver of uptake among respondents. Parents and carers identified a range of other factors, including menu choice, the taste of the food and how well school meals met learner needs. These findings may indicate that opportunities to increase uptake further, particularly among respondents from lower-income households, could depend not only on the continued availability of free meals but also on the attractiveness of the school meal offer itself. For example, expanding menu choice, increasing the variety of options available and ensuring that school lunches better meet learner preferences and needs may help to encourage greater participation.

4.1.1. Overview of uptake and participation in school meals

This sub-section explores what parents and carers reported about current patterns of school meal uptake and how participation has changed since UPFSM was introduced. Survey findings suggest that, among respondents, school meal uptake has increased for many learners following the introduction of the policy, particularly those from middle- and higher-income households. The findings also suggest that reported increases in uptake have been somewhat less pronounced among respondents from more socio-economically disadvantaged households. However, higher reported uptake among younger learners from low-income households compared with older learners may indicate the early stages of a change in participation patterns.

Overall, almost all parents and carers (92%) reported that their child currently eats at least 1 school lunch per week. Over half of parents and carers (58%) reported that their child has a school lunch every day, as shown in Figure 1. This pattern was broadly consistent across most income brackets, although daily school meal uptake was slightly lower among families earning below £10,000 (54%). Smaller proportions of respondents reported that their child eats school meals on between 1 and 4 days per week (5% to 12%, depending on frequency), while only 8% reported that their child does not eat any school meals during a typical school week.

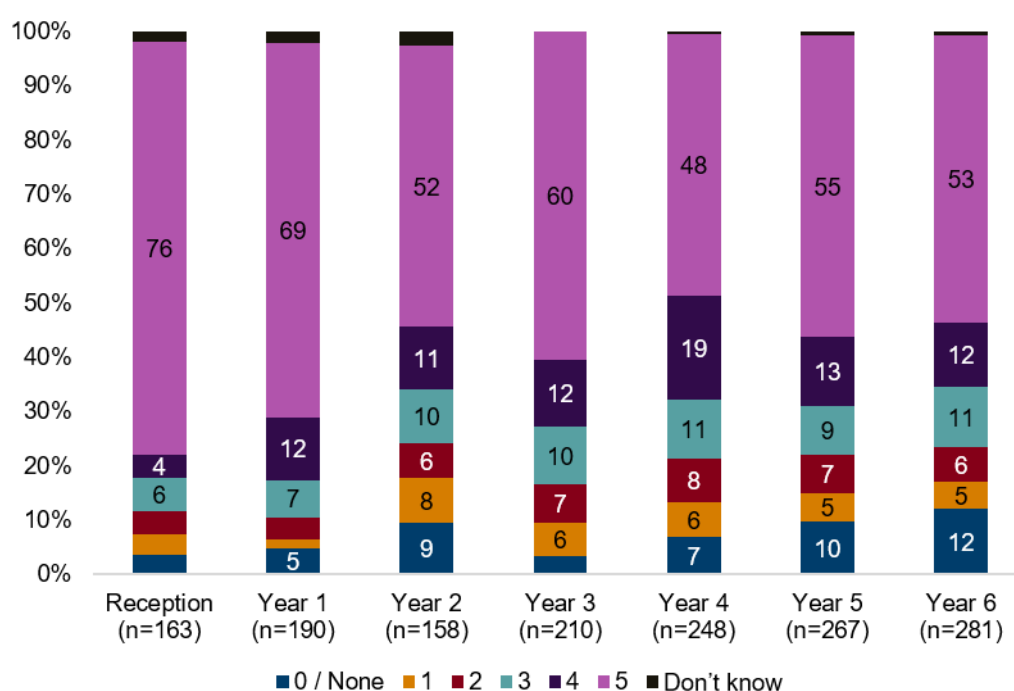
Figure 1: responses to the question “on average, how many school lunches does your child eat each week?” (n=1,517)



Description of figure 1: this bar chart shows the number of school lunches a child eats each week, including 58% eating 5 school lunches followed by 12% eating 4, 9% eating 3, 6% eating 2 and 5% eating 1.

Survey findings indicate that uptake is particularly high among younger learners, as shown in Figure 2. Around three quarters of responding parents and carers with a child in Reception (76%) and over two-thirds of those with a child in Year 1 (69%) reported that their child eats a school lunch every day. From Year 2 onwards, reported daily uptake begins to fall, reaching its lowest level among respondents with a child in Year 4, where fewer than half of learners (48%) eat school meals every day. Among respondents with a child in Years 5 or 6, reported daily uptake remained lower than in the early years (55% and 53%, respectively), and these year groups also had the highest proportions reporting that their child does not eat school meals at all (10% and 12%, respectively). These patterns are consistent with findings from the first Interim Report, which suggested that learners who have had access to the universal meal offer since starting school may be more likely to take up school meals regularly.

Figure 2: responses to the question “on average, how many school lunches does your child eat each week?” by year group



Description of figure 2: this bar chart shows the number of school lunches a child eats each week per year group, with Reception being the year group most likely to have school meals 5 times a week (76%) and Year 4 being the least likely (48%).

Among survey respondents, learners from lower-income households were generally reported to take up school meals slightly less frequently overall than those from middle- and higher-income households. However, reported uptake was higher among learners from low-income families in Reception and Year 1 than in later year groups. For example, among respondents from households earning below £10,000, 63% of learners in Reception were reported to eat school meals every day, compared with 44% in Year 6. A similar pattern was observed among respondents from households earning £10,001 to £20,000, where 81% of those in Reception ate school meals 5 days a week, falling to around 54% in Year 6. A possible interpretation is that higher reported uptake among younger learners from lower-income households reflects the early stages of a change in participation patterns following the introduction of UPFSM. However, as these data are cross-sectional and based on survey responses, it is not possible to determine whether the differences observed reflect cohort effects, age-related differences in school meal use, or other factors. If these patterns are sustained as learners progress through school, they could contribute to higher levels of school meal uptake among lower-income households over time, although this cannot be confirmed from the survey data.

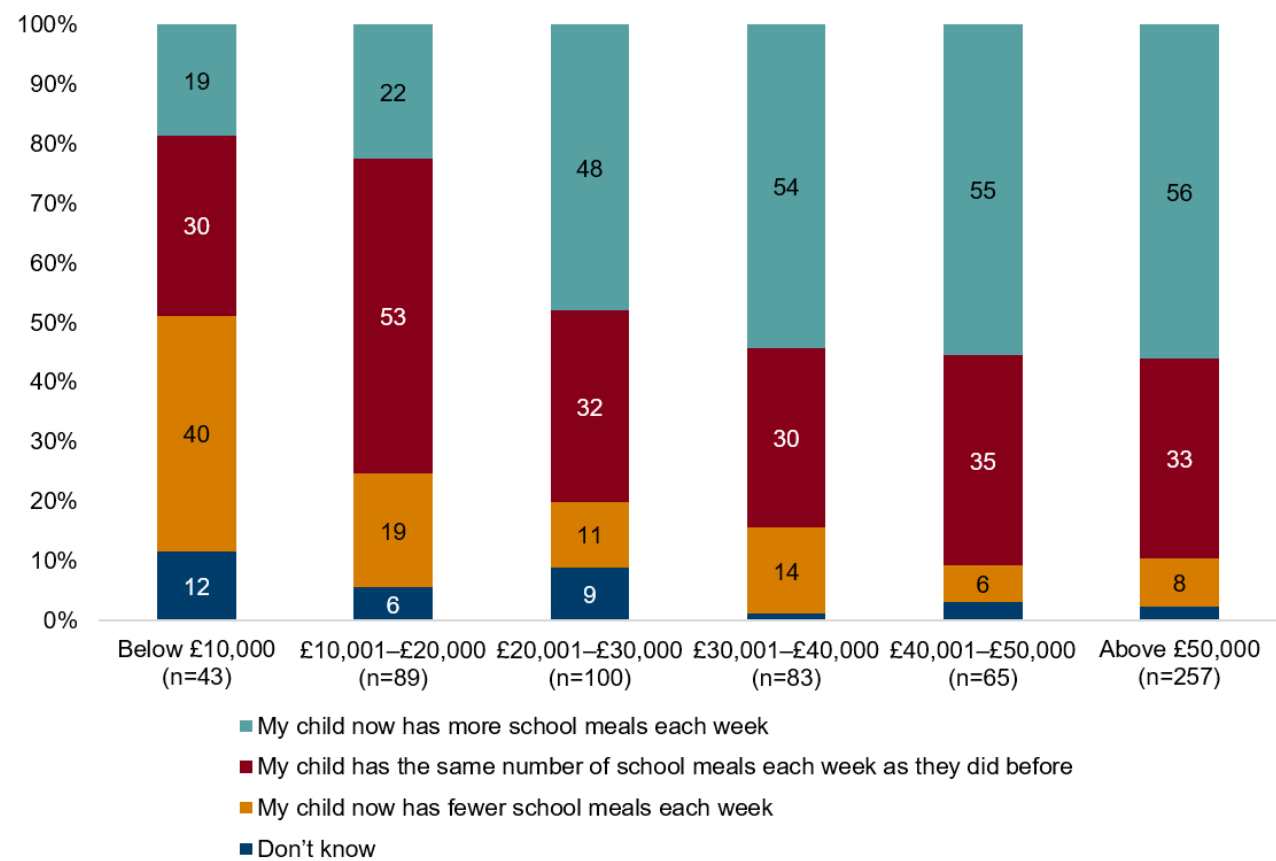
Parents and carers whose child was already in primary school when the policy began were asked about changes in school meal uptake since UPFSM was introduced. Among this group, nearly half of parents and carers (45%) said their child now has more school meals each week, while around a third (35%) reported no change in the frequency of school meal uptake and around 1 in 7 (15%) said their child now has fewer school meals. The group

reporting no change includes both learners whose level of school meal uptake remained consistent and those who did not access school meals before the policy and continue not to do so.

Responses also varied by socio-economic group. Parents and carers of a child who is eligible for income-related means-tested FSM were less likely to report an increase in school meals (25%) compared with those who were not eligible (53%), and more likely to report a decrease (26% compared with 10%).

A similar pattern was evident across household income groups. There was a statistically significant difference in reported changes in school meal uptake between learners from the lowest-income households (earning below £20,000) and all other income groups. Respondents in higher-income households were more likely to say that their child now has more school meals than before UPFSM was introduced (54% of those earning £30,001 to £40,000, 55% of those earning £40,001 to £50,000, 56% of those earning over £50,000). This compares with 19% of respondents from households earning under £10,000, as shown in Figure 2.

Figure 3: responses to the question “overall, has the number of school lunches that your child has each week changed since the UPFSM policy was implemented?” by household income (n=796)



[Note 1]: Results for some income groups are based on fewer than 100 respondents and should therefore be interpreted with caution.

Description of figure 3: this bar chart shows the number of school lunches a child eats each week since policy implementation per income band, increasing in higher income categories. The proportion saying their child now eats more school meals each week increased from 19% among households earning below £10,000 to 56% among households earning over £50,000. By contrast, respondents earning below £10,000 were more likely to report that their child now eats fewer school meals (40%) than those in higher-income groups (6% to 14%).

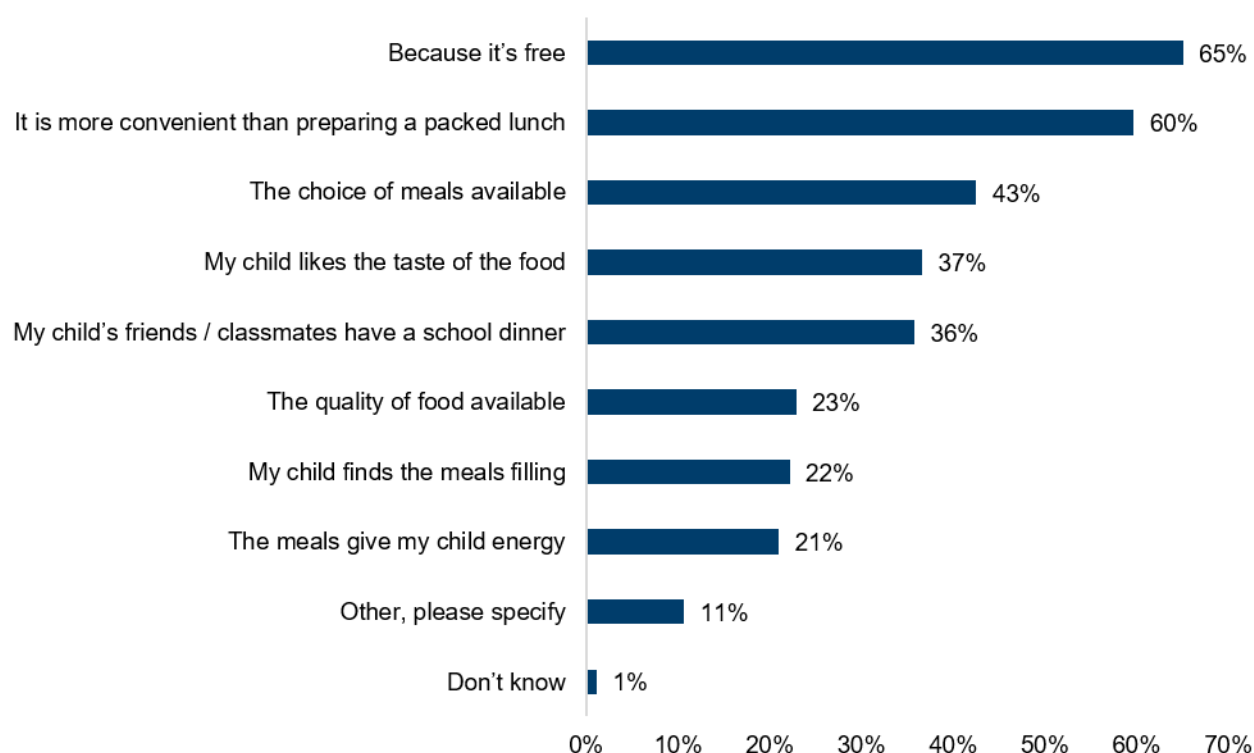
Reductions in school meal uptake were most commonly reported by respondents from the lowest-income category, with two fifths (40%) of parents and carers from households earning under £10,000 reporting that their child now eats fewer school meals each week. This compares with only small minorities in higher-income households (6% of those earning £40,001 to £50,000 and 8% of those earning over £50,000). The reasons for these differences are explored further in Chapter 4.1.3.

4.1.2. Drivers of uptake

The previous sub-section showed that respondents from lower-income groups were less likely to report increases in school meal uptake and, in some cases, more likely to report decreases. This sub-section provides further context to these findings by examining the factors that respondents identified as influencing families' decisions to choose a school meal. While cost was the most commonly selected reason, uptake was also associated with a range of practical and social factors, including convenience, menu choice, food preferences and opportunities to eat with friends. The importance attached to these factors also varied by household income. While respondents across income groups generally identified similar reasons for choosing school meals, those from more socio-economically disadvantaged households were less likely to select many of these factors than respondents from middle- and higher-income households. As respondents could select multiple reasons, this appears to reflect lower response rates across the listed options rather than lower-income households identifying different reasons for choosing school meals.

Among survey respondents, parents and carers most commonly selected cost and convenience as reasons for choosing school meals, with the majority saying they opt for school meals because they are free (65%) and because they are more convenient than preparing a packed lunch (60%), as shown in Figure 3. Respondents also identified a range of factors related to learner preferences, including the range of meals on offer (43%), whether their child likes the taste of the food (37%) and whether their child can eat with their friends at school (36%).

Figure 4: responses to the question “why do you, as a family, choose school lunches, whether every day or on selected days?” (n=1,403)



Description of figure 4: this bar chart shows the reasons why families do choose school dinners, with cost (65%) and convenience (60%) as the most commonly cited reasons, followed by the choice of meals available (43%), liking the taste of the food (37%) and classmates having a school dinner (36%).

While respondents tended to give similar reasons overall, the proportion selecting these reasons varied by household income, as shown in Table 1. Differences by income were most pronounced for cost and convenience. Respondents from higher-income households were much more likely to select cost savings and convenience as reasons for choosing school meals (earning above £50,000: 70% selected cost, while 75% selected convenience), whereas these factors, while still the most important, were less frequently selected by families on the lowest incomes (earning below £10,000: 51% selected cost, while 31% selected convenience). Similar patterns were observed across many of the other response options. This pattern appears to be driven by lower-income respondents selecting fewer of the available response options overall, rather than by identifying alternative reasons for choosing school meals.

Table 1: responses to the question “why do you, as a family, choose school lunches, whether every day or on selected days?” by household income (n=1,157)

Reason for choosing school lunch	Below 10,000 (%)	10,001-20,000 (%)	20,001-30,000 (%)	30,001-40,000 (%)	40,001-50,000 (%)	Above 50,000 (%)
Because it's free	51	62	63	66	75	70
It is more convenient than preparing a packed lunch	31	51	49	54	72	75
The choice of meals available	32	42	43	51	44	43
My child likes the taste of the food	26	28	41	41	40	40
My child's friends / classmates have a school dinner	20	28	32	38	42	41
The quality of food available	18	28	28	34	22	19
My child finds the meals filling	18	25	23	27	22	24
The meals give my child energy	15	18	21	28	24	22
Other, please specify	12	10	9	9	14	9
Don't know	4	3	1	1	0	0

In addition to the options provided, 11% of respondents selected 'other', citing a range of additional reasons for choosing school meals. A common theme was the preference for a hot, cooked meal, particularly during colder months, with parents and carers describing this as more filling and suitable than cold packed lunches. Many respondents also referred to dietary variety and opportunities to try new foods, noting that school meals enabled learners to eat a wider range of meals than they would typically have at home, sometimes influenced by seeing peers eat the same foods.

“Financially it helps us a lot. But also my child is less fussy at school eating what their friends eat than if we did a lunchbox. So it benefits us financially and healthy meals wise for my child who would otherwise be extremely limited on lunchbox options.” Survey respondent

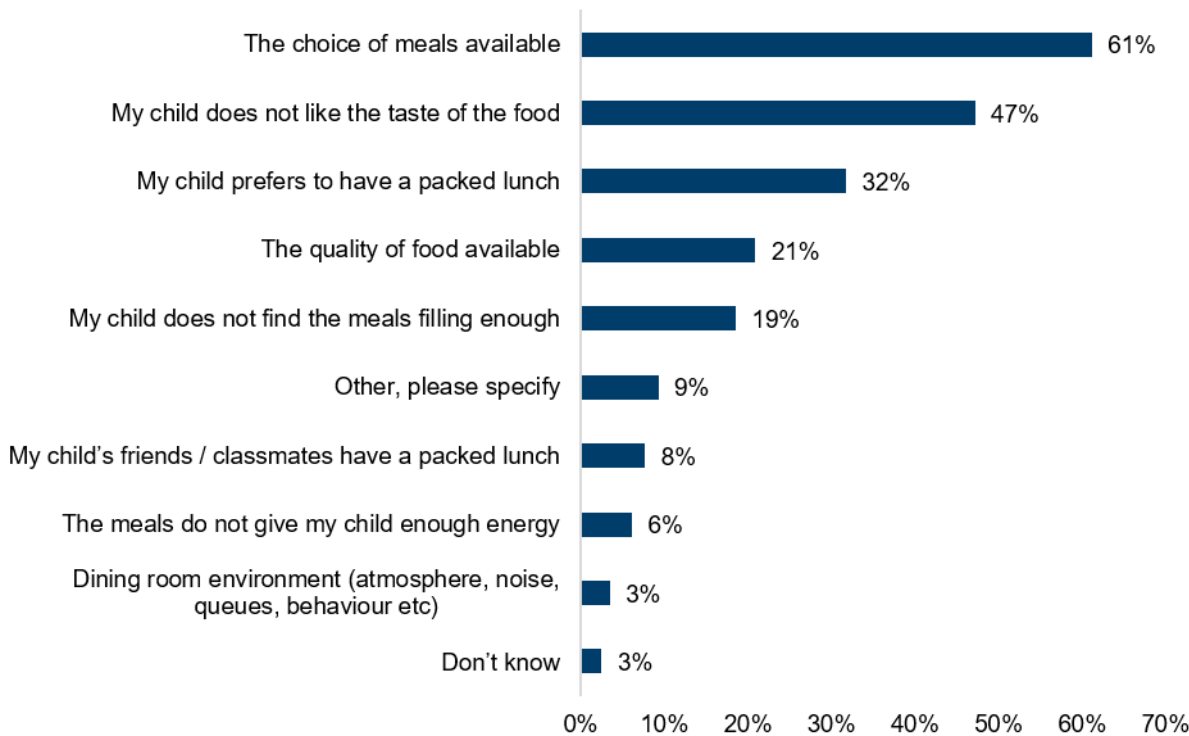
“My child is eating a much more varied diet and it’s reassuring for me as a parent that he is having a hot meal daily especially in colder and poor weather.” Survey respondent

4.1.3. Barriers to uptake

This sub-section explores why families choose not to take up a school meal to further contextualise the patterns of uptake described in Chapter 4.1.1. Among survey respondents, the most commonly selected reasons for not choosing school meals were because their child did not like the food or wanted more choice. While similar reasons were identified across income groups, choosing not to take up school meals was more often a matter of preference for higher-income households, whereas for lower-income households it was more closely linked to concerns about suitability and practicality.

Parents and carers responding to the survey said that the main reason for not choosing a school meal was the food itself. Limited menu choice (61%) and not liking the taste of the food (47%) were the most frequently selected reasons, as shown in Figure 5. Around a third (32%) also said their child prefers to bring a packed lunch instead.

Figure 5: responses to the question “why do you, as a family, choose not to have school lunches, whether every day or on selected days?” (n=636)



Description of figure 5: this bar chart shows the reasons why families do not choose school lunches, with choice (61%) and taste (47%) as the most commonly cited reasons followed

by preferring to have a packed lunch (32%), the quality of food available (21%) and not finding the meals filling enough (19%).

Very few respondents identified social factors as barriers to school meal uptake, such as their child's friends or classmates having a packed lunch, or aspects of the dining hall environment (Chapter 4.3). Only a small minority said their child did not want a school lunch because their friends were not having one (8%), or because of the dining hall setting, such as the atmosphere, noise, queues or behaviour (3%). This contrasts with findings from the first Interim Report, where some learners, parents and carers and school staff reported that longer queues, noise and a more crowded dining environment were acting as barriers to school meal uptake. The difference may reflect the relatively small number of schools in which these issues were reported in the case studies, or the fact that parents and carers may be less aware of day-to-day experiences within the dining hall.

Some survey respondents also raised concerns about the quality of the food, though these reasons were mentioned by fewer respondents overall. Around 1 in 5 (21%) said they did not choose school meals because of worries about food quality. A similar proportion (19%) said the meals were not filling enough and 6% reported that they did not give their child enough energy.

Overall, the same broad reasons for not choosing school meals were mentioned across different groups of respondents, including those defined by household income, eligibility for means-tested FSM, ALN status and rural or urban location. Where differences did emerge, these were most evident in the extent to which learners preferred packed lunches over school meals. This was much more common among higher-income households (42% of those earning above £50,000) and those living in urban areas (30%), and less common among lower-income households (13% of those earning below £10,000) and rural families (2%). This may suggest that, for some groups, opting out of school meals is closely linked to choice and preference, while for others school meals remain the more acceptable or practical option.

Across all respondent groups, limited menu choice was the single most common reason parents and carers gave for not choosing school meals. While this concern was mentioned most often by respondents from lower- and middle-income households (ranging from 60% to 71% for those earning up to £40,000), it remained an important issue among respondents from higher-income households (55% to 56% for households earning above £40,000), indicating that menu variety is a widespread issue rather than one confined to particular groups.

In open-ended survey responses, some parents and carers elaborated that their child was unwilling to eat school meals on certain days because of limited options, repetitive menus, menu changes that removed familiar choices they relied on, such as sandwiches, or introduced meals their child did not like. For some, changes to menus and perceived changes to suppliers led to learners eating fewer school meals and parents and carers relying more heavily on packed lunches to ensure their child ate during the school day. Others also expressed concern around insufficient portion sizes, particularly for older learners, who they reported were left hungry during the school day.

“The menu has decreased in quality and choice. My child used to have school meals around 3 times a week. Now they have a school meal once every 3 weeks.” Survey respondent

Open-ended responses also highlighted concerns from some respondents about accessibility and dietary needs. These concerns were highlighted by some parents and carers of a child with allergies, intolerances or medically restricted diets, who felt that available options did not adequately meet their child’s needs (see Chapter 4.3.1.5).

As explored in Chapter 4.1.1, respondents from households in the lowest-income bracket (earning below £10,000 a year) were more likely to report lower school meal uptake, as well as smaller increases and larger decreases in uptake since UPFSM was introduced. Analysis of the open-ended survey responses from these parents and carers suggests that the reasons given for not taking up school meals were broadly similar to those reported by parents and carers overall. The most commonly cited reasons given were that their child did not like the meals, often due to “fussy eating”, a preference for familiar foods or sensory needs. Others concerns included limited choice, repetitive menus and perceptions of poor food quality.

“My child struggles with the meals. There used to be an option to have a wrap/sandwich or plain pasta but since a change in menu she doesn’t like them. Unfortunately, I’m not in the position to provide packed lunches daily and I know now she sometimes goes all day eating very little.” Survey respondent

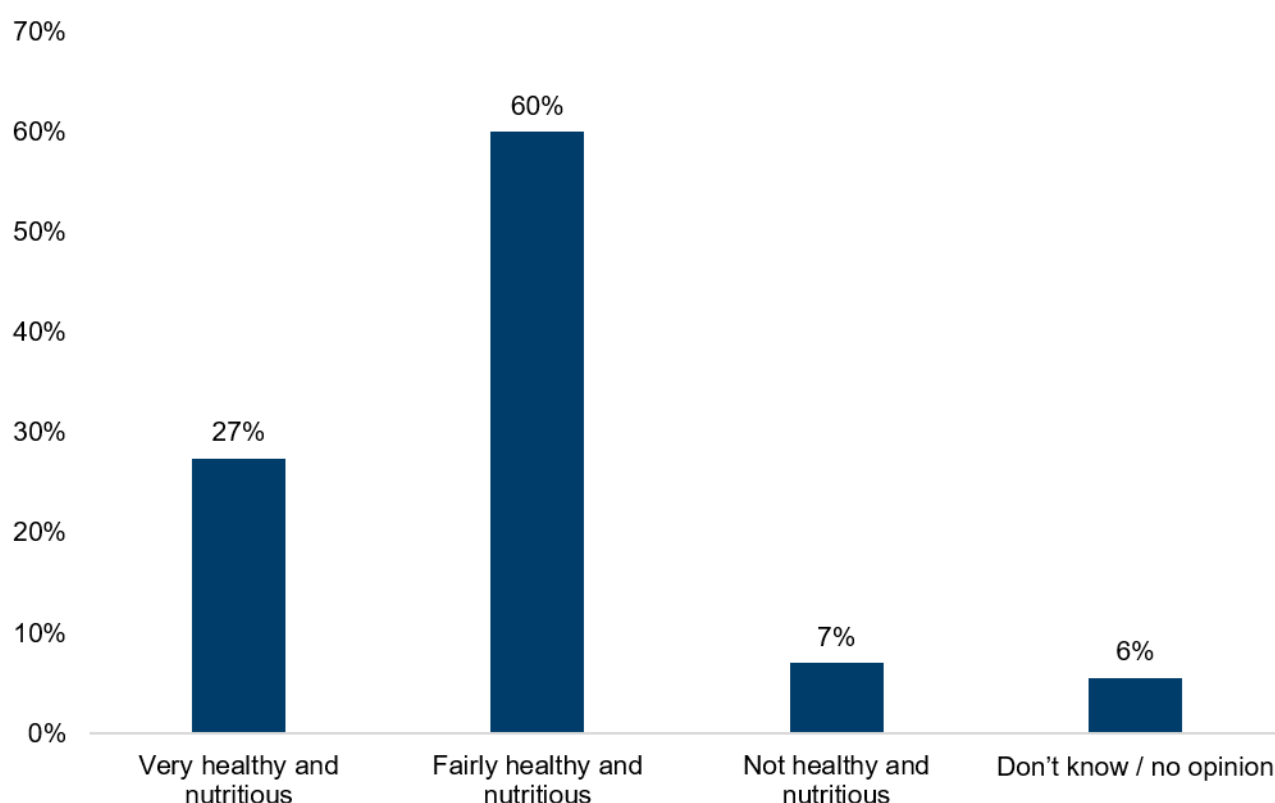
4.2. What impact has the policy had on children’s health and wellbeing?

This sub-section explores parent and carer respondent views on the health and nutritional quality of school meals, as well as the impact of the UPFSM policy on their child’s health and wellbeing. Most respondents perceived the food to be healthy and nutritious and viewed UPFSM as having a positive effect on their child’s health and wellbeing, with benefits reported across all income groups and little evidence of negative impacts.

4.2.1. Health and nutritional quality of school meals

Survey responses indicate that most respondents perceived school meals to be healthy and nutritious, with almost 9 in 10 (87%) rating them positively, including more than 1 in 4 (27%) who described them as “very healthy” and 6 in 10 (60%) as “fairly healthy”. Only 7% of respondents felt that school meals were not healthy.

Figure 6: responses to the question “overall, how would you rate the school lunches on offer at your child’s school in terms of health and nutrition?” (n=1,517)



Description of figure 6: this bar chart shows that most parents or carers who responded to the survey would rate the health and nutrition of school lunches as ‘Fairly healthy and nutritious’ (60%), ‘Very healthy and nutritious’ (27%), ‘Not healthy and nutritious’ (7%) and ‘Don’t know/no opinion’ (6%).

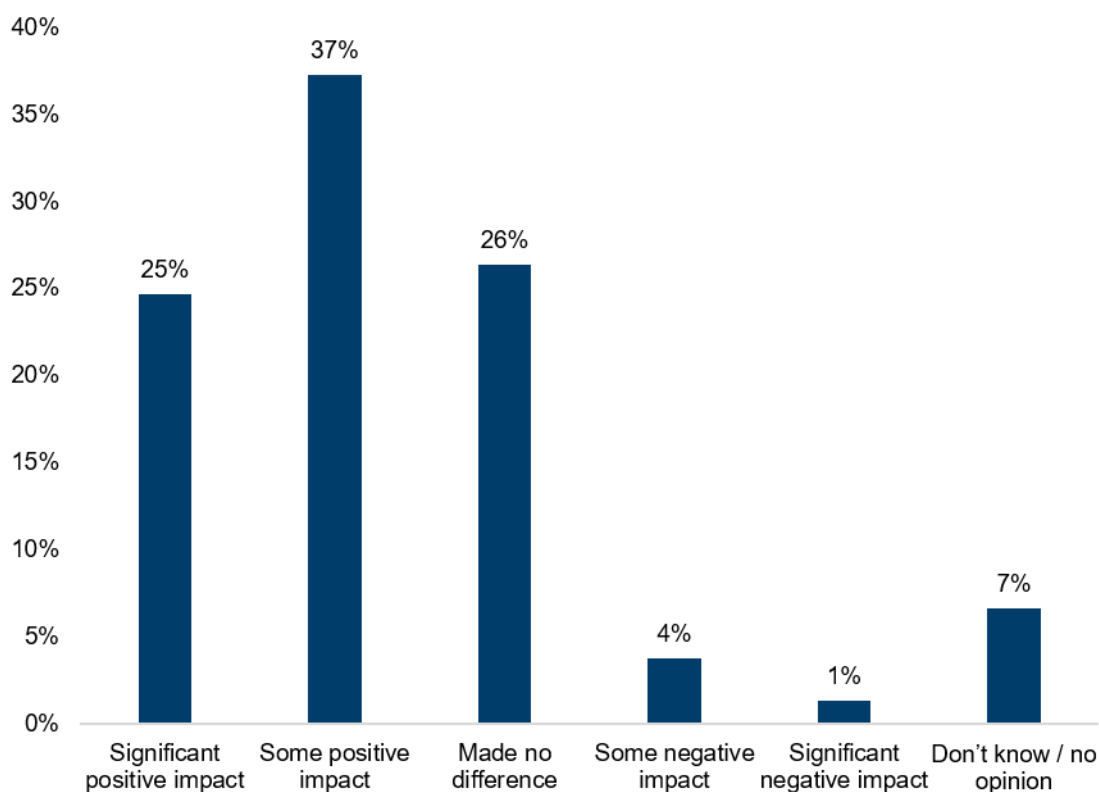
Positive perceptions of the health and nutritional quality of school meals were most evident among respondents eligible for income-related means tested FSM and those on lower-incomes, who were more likely to describe school meals as “very healthy”. For example, 35% of eFSM respondents selected this response, compared to 23% of non-eFSM respondents, and 40% among households earning below £10,000. Respondents from higher-income households were less likely to describe school meals as “very healthy”, although this did not reflect more negative views overall. Instead, they were more likely to rate school meals as “fairly healthy”. In households earning over £50,000, 16% described meals as “very healthy”, while 69% rated them as “fairly healthy”. This suggests differences in the strength of positive perceptions rather than a marked divide in views about the health and nutritional quality of school meals.

Across all respondent groups, relatively few respondents viewed school meals as unhealthy. Where differences did appear, they were modest, with respondents from households earning between £10,001 to £20,000 and £30,001 to £40,000 being least likely to rate school meals as unhealthy (2% and 3%, respectively). These findings indicate that most respondents trust school meals as a healthy and nutritious option for their child.

4.2.2. Perceptions on the impact of UPFSM on children's health and wellbeing

When asked to rate the impact of UPFSM on their child's health and wellbeing, most respondents reported a positive effect, as shown in Figure 7. A majority (62%) reported that the policy has had a positive impact, including a quarter (25%) who felt it had made a "significant positive impact". Just over a quarter (26%) said UPFSM had made no difference, while only a few reported any negative impact (5% in total).

Figure 7: responses to the question "what impacts, if any, do you think the introduction of the UPFSM policy has had on the health and wellbeing of your child?" (n=1,517)



Description of figure 7: this bar chart shows the impact of the policy of child health and wellbeing was broadly perceived as positive, including a 'Significant positive impact' (25%) and 'Some positive impact' (37%), or as having no difference (26%); negative responses were much lower, with 'Some negative impact' (4%) and 'Significant negative impact' (1%).

Many respondents expanded on their responses through open-text responses by describing a range of perceived benefits associated with UPFSM. Some felt that exposure to school meals had encouraged their child to try new foods at school, including foods not typically eaten at home, often influenced by seeing peers eat the same meals (see Chapter 4.3.2).

Open-ended responses also highlighted perceived social and community benefits. Some parents and carers described the value of shared mealtimes and children eating alongside their peers in supporting social interaction and helping children feel included. Others emphasised the importance of the universal nature of the offer, noting that all learners received the same meals regardless of household income. Respondents commonly felt that

this helped to reduce stigma and minimise the risk of learners being singled out because of their family's financial circumstances.

Some respondents also highlighted the value of access to a hot, balanced meal during the school day, which some parents and carers felt supported their child's energy levels, concentration and readiness for afternoon learning.

"He will try things at school he would normally make a fuss about trying at home. He will also try things his friends are eating." Survey respondent

"Doesn't single out those who are on the free school scheme." Survey respondent

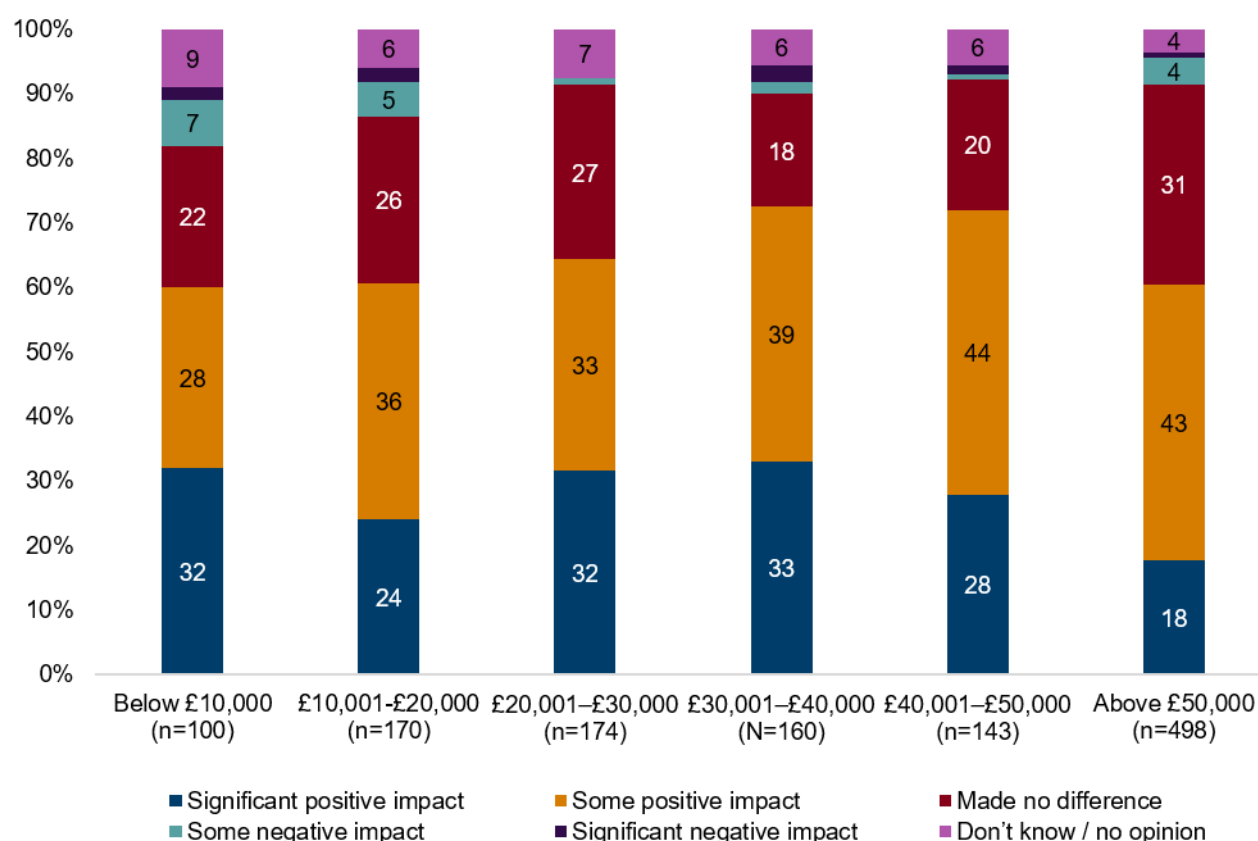
The most frequently raised negative comments from open-ended responses related to portion size. Some parents and carers expressed concern that portions were insufficient, while others linked concerns about portion size to the taste or quality of the food, reporting that these factors together meant their child was not eating enough during the school day.

Responses also showed that views were more mixed when it came to food quality and nutritional balance. Many respondents perceived the quality or preparation of meals negatively, describing food as cold, bland, unappealing or poorly cooked. In some cases, this led learners to avoid school meals altogether or eat too little to remain full throughout the day due to dislike of the taste, texture or presentation. Others expressed concerns about the nutritional content of meals, including a perceived reliance on ultra-processed foods or low-cost ingredients. In contrast, a small number of respondents felt that menus were overly focused on health, resulting in meals that were not appealing or child-friendly, which again led to learners eating very little and going hungry. To note, views on ultra-processed foods vary widely across the population, and there is no single agreed definition or shared understanding of what constitutes ultra-processed food. References to ultra-processed foods in these findings reflect parents' and carers' perceptions rather than an objective assessment of the nutritional quality of school meals.

"Seeing so many classmates eat unhealthily each day has made it harder to encourage healthy eating at home. She now expects dessert and regular chips, baked beans, ultra-processed sauces etc and it is harder to get her to eat the healthier food." Survey respondent

There was a statistically significant relationship between household income and respondents' perceptions of the impact of UPFSM on their child's health and wellbeing, although differences between income groups were relatively modest, as shown in Figure 7. Positive impacts were reported across all income groups, with perceptions most positive among respondents from middle-income households (those earning between £20,001 to £30,000 and £30,001 to £40,000) while respondents from higher-income households (earning above £50,000) were more likely to report no change compared to other income groups. Respondents from lower-income households (earning below £10,000 and between £10,001 and £20,000) also largely reported positive impacts, though they were slightly more likely than other groups to report negative experiences or uncertainty.

Figure 8: responses to the question “what impacts, if any, do you think the introduction of the UPFSM policy has had on the health and wellbeing of your child?” by household income



Description of figure 8: bar chart showing the introduction of the policy is considered to have had positive impacts on child health and wellbeing, presented per income group. Between 18% and 33% across income groups said that there had been a significant effect and between 28% and 44% said that there had been some positive impact.

Taken together with the findings on uptake, these results suggest that respondents who reported more consistent school meal uptake were also more likely to perceive benefits for their child’s health and wellbeing. However, lower participation and declining uptake among some lower-income households may reduce opportunities for these perceived benefits to be realised. The findings also suggest that respondents were more likely to perceive positive impacts where UPFSM was seen as improving access to healthy and nutritious meals, while perceived impacts tended to be more limited where similar provision was already available before the introduction of the policy.

4.3. What are the emerging impacts of the policy on school life?

This sub-section explores the perceived impacts of the policy on school life from a parent and carer perspective. Overall, survey findings suggest that parents and carers perceive UPFSM to be having a modest but generally positive impact on school life. Survey responses indicate that parents and carers view the policy as contributing positively to some aspects of learners’ school experience, although its wider effects on the organisation and

environment of lunchtime appear less visible to parents and carers and may be perceived differently across respondent groups.

Where respondents reported changes in their child's enjoyment of lunchtime since the introduction of UPFSM, positive changes were reported more frequently than negative changes. However, awareness of changes to other aspects of the lunchtime experience, such as noise levels, queuing, staffing and lunchtime organisation, was more limited. Many respondents indicated that they did not know whether these aspects had changed since the policy was introduced. Where impacts were reported, respondents tended to think that the situation was improving as opposed to getting worse. However, experiences varied between groups, with parents and carers of a child eligible for income-related means-tested FSM and those from lower-income households more likely to report positive changes, whereas respondents whose child has ALN were less likely to perceive benefits. This is consistent with findings from the first Interim Report, which suggested that increased school meal uptake may, in some settings, have contributed to longer queues, rushed eating and more crowded dining environments. These factors were identified as potential barriers to uptake for some learners, particularly those with ALN who may be more sensitive to busy or sensory-rich environments.

4.3.1. Impact on lunchtime experience

This sub-section explores parent and carer perceptions of whether their child enjoys lunchtime more or less as a result of the policy as well as their responses to the question of whether their child mentioned any changes to their lunchtime experience since UPFSM was introduced, including noise in the dining room, the dining room environment, lunch queues, time available for lunch and staffing levels at lunch. Overall, while respondents generally said their child now enjoys lunchtime more, many respondents said they did not know whether aspects of the lunchtime environment, such as noise levels, queues, staffing and litter, had changed since the policy was introduced. Where respondents did express a view, they were generally mixed.

4.3.1.1. Enjoyment of lunchtime

Survey responses suggest that respondents were more likely to perceive improvements in their child's enjoyment of lunchtime following the introduction of UPFSM than deteriorations. Overall, 43% of respondents either agreed (26%) or strongly agreed (17%) that their child enjoys lunchtime more as a result of the policy, while only 9% disagreed and 7% strongly disagreed. There was little variation by eFSM status, although some differences were observed by ALN status, school location and household income.

Respondents whose child has ALN were slightly less likely to report increased enjoyment (13% strongly agree, compared with 17% among respondents whose child does not have ALN) and slightly more likely to strongly disagree (10%, compared with 7%). Similarly, respondents from households earning below £10,000 were more likely to strongly disagree that enjoyment had improved (15%) than those in higher income bands (4% to 8%).

Variation by school location was less clear. While respondents from rural areas were slightly more likely to strongly agree that lunchtime enjoyment had improved (21%, compared with

16% in urban schools), overall levels of disagreement were broadly similar across rural and urban settings.

4.3.1.2. Changes to the noise level in the dining room

Survey responses suggest that relatively few respondents recalled their child mentioning changes in dining room noise levels following the introduction of UPFSM, as shown in Figure 8. Over half of respondents (54%) said that they did not know whether the noise levels in the dining room had changed since the introduction of the policy, while around one third (31%) indicated that their child had not mentioned any change. Very few respondents reported the situation had got better (7%, combining 'much better' and 'a little better' responses) or reported it had got worse (7%, combining 'much worse' and 'a little worse' responses).

Some small differences were observed across groups. Respondents whose child has ALN were slightly more likely to say that their child had mentioned noise levels becoming worse since the introduction of UPFSM. In particular, 7% indicated that their child had mentioned noise becoming 'much worse', compared with 2% of respondents whose child does not have ALN. While statistically significant, the strength of association was small, indicating only modest differences between groups.

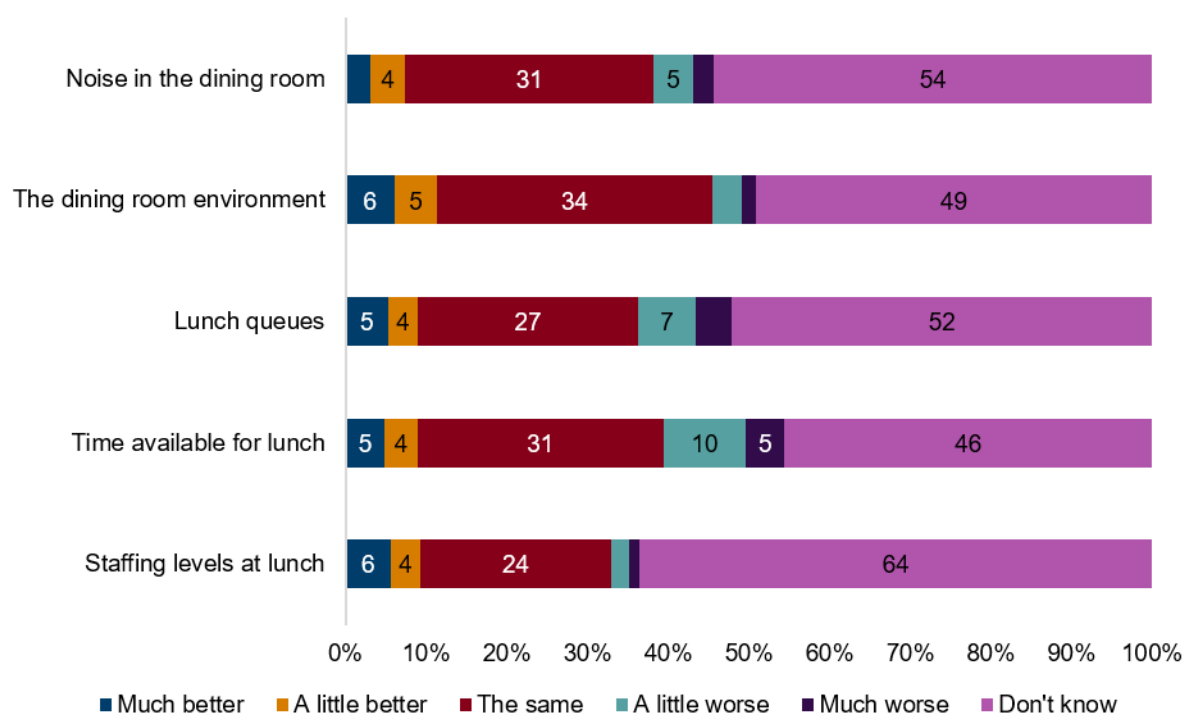
Respondents whose child is eligible for income-related means-tested FSM were slightly more likely than those whose child is not eligible to report that their child had mentioned improvements in noise levels. Specifically, 5% said their child had mentioned noise becoming "much better" (compared with 2% of non-eFSM respondents), and 6% reported "a little better" (compared with 3%). Respondents whose child is not eligible for income-related means-tested FSM were more likely to select "don't know" (57% non-eFSM, 47% eFSM). There was little difference between these two groups in disagreement with the statement.

Respondents from households earning below £10,000 and between £20,001 and £30,000 were more likely than those in other income groups to say that their child had mentioned changes in noise levels since the introduction of UPFSM, including both improvements and deteriorations, suggesting more polarised views within these groups.

4.3.1.3. Wider impacts on the dining room

A similar pattern was evident when respondents were asked whether their child had mentioned changes to the dining room environment more generally. Around half (49%) of respondents selected "don't know", and over a third (34%) reported that their child had not mentioned any change, as shown in Figure 8. Among respondents whose child had mentioned a change, more respondents perceived an improvement (11%) rather than things worsening (5%). Differences by ALN and eFSM status were small. Respondents whose child is eligible for income-related means-tested FSM and those whose child does not have ALN were slightly more likely to say that their child had mentioned improvements to the dining room environment since the introduction of UPFSM.

Figure 9: responses to the question “has your child mentioned any changes to the following since UPFSM was introduced” (n=1,517)



Description of figure 9: bar chart showing responses to changes in lunchtime experience mentioned by children to parents and carers, with most reporting ‘The same’ or ‘Don’t know’ to noise in the dining room (31%: same; 54%: don’t know), the dining room environment (34%: same; 49%: don’t know), lunch queues (27%: same; 52%: don’t know), time available for lunch (31%: same; 46%: don’t know) and staffing levels (24%: same; 64%: don’t know).

A similar pattern was observed for lunch queues and duration. Over half of respondents (52%) did not know whether their child had mentioned any changes to lunch queues since the introduction of UPFSM, while 27% said that their child had not mentioned any change. Among respondents whose child had mentioned a change, slightly more reported that queues had worsened than improved. A similar pattern was observed for lunch duration, with 46% saying that they did not know whether their child had mentioned any changes and 31% reporting that their child had not mentioned any change. Among respondents whose child had mentioned a change, negative changes were reported slightly more frequently than positive changes (15% compared with 9%), with only minor variation across income groups.

Responses relating to staffing levels at lunchtime followed a similar pattern. Most respondents (64%) did not know whether their child had mentioned any changes to staffing levels, while 24% reported that their child had not mentioned any change. This finding is consistent with evidence from the first Interim Report, which found that schools adjusted existing staff hours and roles to ensure sufficient lunchtime supervision. This included both temporary measures, such as reassigning teaching assistants or administrative staff to the canteen, and more permanent recruitment of lunchtime supervisors. The high proportion of respondents who were unaware of these changes to staffing levels may suggest that these

adjustments were not highly visible to learners and their families. Among respondents whose child had mentioned a change, reports of improvements were more common among lower-income households and declined with increasing household income, from 16% among households earning below £10,000 to 1% among those earning above £50,000.

4.3.1.4. Perceptions of changes to the school meal offer

Overall, survey responses suggest that parents and carers generally perceived the school meal offer to be unchanged or to have improved slightly following the introduction of UPFSM. While many respondents did not perceive substantial changes to the school meal offer, some reported improvements in food choice, quality and taste (see Chapter 4.2.1 for views on the health and nutritional quality of meals). However, perceptions were not consistent across all respondent groups, with households earning above £50,000 somewhat more likely than those in other income groups to report that the school meal offer had worsened since UPFSM, particularly in relation to quality and taste. The implications of these perceptions for school meal uptake are explored in Chapter 4.1.

Responses relating to food choice, quality and taste were mixed and suggested only limited perceived change since the introduction of the UPFSM policy. For example, slightly more respondents reported that their child has mentioned that meal choices have got a little or a lot better (28%) than not changing (22%) or getting a little or a lot worse (22%). For food quality and taste, the most common response was that respondents did not know whether their child had mentioned any change (26% and 29% respectively). In both cases, where respondents mentioned that their child had observed a change, more thought that the situation had improved over worsening. Specifically, 25% of respondents said that their child mentioned that food quality and taste have become a little or a lot better, while 19% indicated that the quality had worsened and 18% indicated that taste had worsened. These opinions were consistent across most respondent groups, although some variation was evident by household income. Respondents from households earning below £10,000 were the only income group more likely to report that their child has mentioned a worsening of food choice than an improvement. Specifically, 34% said that their child mentioned that food choice had worsened, compared with 30% who felt that it had improved.

Respondents from households earning over £50,000 also expressed somewhat less positive views of their child regarding food quality and taste. For food quality, 19% said that their child mentioned it had worsened since the introduction of UPFSM, compared with 15% of who felt it had improved, going against the overall results indicating strong support for it improving over worsening. For taste, perceptions remained slightly more positive than negative, although the difference was smaller than in other income groups. While 16% said their child had mentioned that taste had improved, 15% said their child had mentioned that it had worsened. By comparison, reported improvements in taste ranged from 23% to 37% across other income groups.

4.3.1.5. Catering for specific dietary needs

Survey responses suggest that many respondents were unsure whether their child had mentioned any changes to catering for specific dietary needs (for example, allergies or sensory needs) since the introduction of UPFSM. Around two-thirds said they did not know

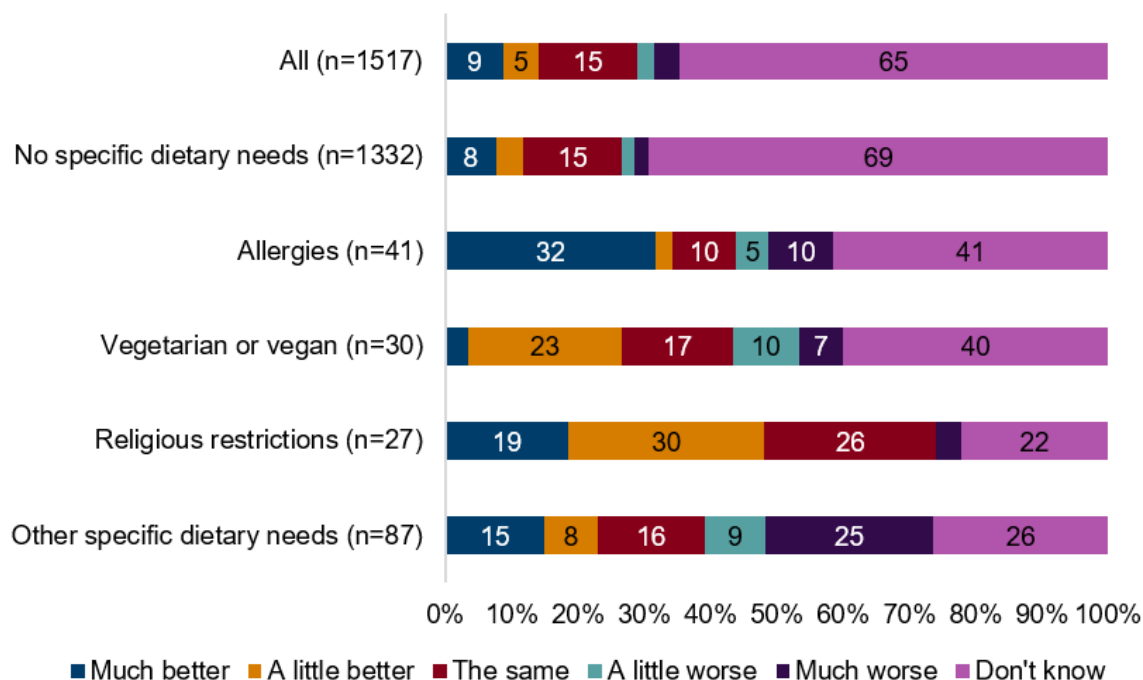
whether their child had mentioned any changes, while one in five (20%) indicated that their child had mentioned a change. Of those whose child had mentioned a change, more thought that the catering for specific dietary needs had improved (14%) as opposed to getting worse (6%).

Figure 10 highlights differences according to whether respondents reported that their child has a specific dietary need. The great majority of respondents indicated that their child did not have any dietary needs (88%). Within this group, 7 in 10 (69%) said that they did not know whether their child had mentioned any changes to catering provision. By contrast, respondents whose child had dietary needs (12% of respondents) were generally more likely to report that their child had mentioned improvements.

Almost half (48%) of respondents whose child required halal or kosher provision said that their child had mentioned improvements in catering for their dietary needs, compared with 12% of respondents whose child did not have a dietary requirement. Respondents whose child has allergies or is vegetarian/vegan were also more likely to report that their child had mentioned improvements (34% allergies, 27% vegetarian or vegan) as opposed to getting worse (15% allergies, 17% vegetarian or vegan).

A slightly different pattern was reported among respondents whose child had another dietary need not listed in the survey, with a quarter (25%) saying that their child had mentioned that provision had become much worse since the introduction of UPFSM. A majority of the 'other' responses described specific dietary requirements, primarily allergies related to nuts, wheat, gluten (including Coeliac disease), cow's milk, lactose, dairy or nuts (63%). Over a quarter (27%) of respondents described other specific medical needs which had an impact on their child's diet including the need for high calorie meals, kidney issues, type 1 diabetes or other complex needs.

Figure 10: responses to the question “has your child mentioned any changes to the following since UPFSM was introduced: catering for specific dietary needs (e.g. allergies or sensory issues)” by specific dietary need



[Note 1]: Options available in the survey: none, allergies, halal, kosher, vegetarian, vegan, other – please specify.

Description of figure 10: bar chart showing responses to changes in dietary catering mentioned by children, with most reporting ‘Don’t know’ (65%) and those with dietary needs including allergies, vegetarian or vegan, religious restrictions or other specific dietary needs more likely to report a positive change.

Managing an increased volume of dietary needs has been done under existing regulatory frameworks, including the Healthy Eating Regulations and a duty to make reasonable adjustments under the Equality Act 2010. Substantive exemptions from the Healthy Eating Regulations are linked to medically prescribed dietary requirements, while minor adaptations are more commonly made within the existing regulatory framework.

Overall, survey responses suggest that, while most respondents were unaware of whether their child had mentioned, any changes to catering for specific dietary needs since the introduction of UPFSM. However, respondents whose child had a dietary requirement were more likely to report that their child had mentioned improvements, although this varied by the type of dietary need. The high proportion of ‘don’t know’ responses may reflect the relatively small number of learners requiring specialist provision, as well as the fact that changes to dietary catering are often integrated into routine school catering arrangements and therefore may be less visible to learners and their families.

4.3.2. Impact on the rest of the school day

Survey findings suggest a modest perceived positive impact on learner enjoyment of school, although almost half of parents and carers (45%) neither agreed nor disagreed that their child enjoys school more as a result of the policy. More respondents agreed that their child's enjoyment had increased (28%) than disagreed (14%).

Respondents whose child is eligible for income-related means-tested FSM were more likely to strongly agree or agree that their child enjoys school more as a result of the policy (38%, compared to 22% for non-eFSM respondents). Moreover, respondents who earn up to £40,000 per year had higher levels of agreement that their child enjoys school more now, compared with respondents who earn above £40,000 (34% to 41% agreement for up to £40,000, compared with 18% to 27% for above £40,000). A possible explanation for the higher levels of agreement among eFSM respondents is that universal provision may have reduced some of the stigma previously associated with receiving eFSM.

Survey responses also indicate that some parents and carers perceived an improvement in their child's energy levels during the afternoon following the introduction of UPFSM. Overall, more than one-third of respondents (37%) agreed or strongly agreed that their child now has more energy in the afternoon, compared with 15% who disagreed or strongly disagreed. Agreement was highest among respondents from households earning below £10,000 per year (48%) and among eFSM learners (43%, compared with 33% non-eFSM). Agreement was broadly similar across middle-income groups (38% to 42%), but lower among households earning above £50,000 (30%). However, levels of disagreement were relatively consistent across income groups.

Findings from the first Interim Report may help contextualise these differences. Case study evidence suggested that the policy had a greater effect on hunger and food insecurity among learners from more disadvantaged households. Some school staff, parents and carers felt that learners who had previously arrived at school hungry were particularly likely to benefit. This may help to explain why respondents from lower-income households were more likely to perceive improvements in their child's afternoon energy levels, although the survey does not establish a causal relationship.

Survey responses also suggested a modest perceived positive impact on learners' concentration in school and during lessons, although this was not reported equally across groups. Around a third of respondents (33%) agreed that their child has improved concentration in school. A further 38% neither agreed nor disagreed and 17% indicated that they have no opinion. Only 12% of respondents disagreed or strongly disagreed.

Perceptions of improved concentration varied between respondent groups. Agreement was higher among respondents whose child was eligible for income-related means-tested FSM (42%) and generally decreased as household income increased. Almost half of respondents from households earning below £10,000 (46%) agreed or strongly agreed that their child's concentration had improved, compared with 24% of those earning over £50,000. As with afternoon energy levels, one possible interpretation is that UPFSM is perceived to have had a greater effect where it improved access to meals. However, these findings reflect parent

and carer perceptions and do not provide an objective measure of changes in learner concentration.

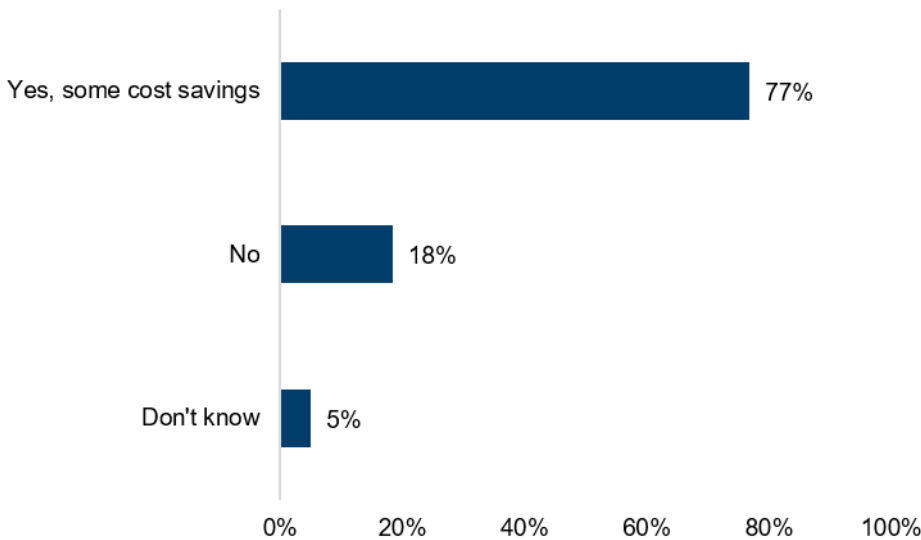
4.4. What impact has the policy had on families?

This sub-section explores respondent views on the perceived impact of UPFSM on families, including finances, time savings and wider effects on family life at home. Survey responses indicate that the policy has been perceived positively by many parents and carers, particularly in relation to reduced financial pressure, time saved and lower levels of concern about their child’s access to food during the school day. Financial benefits were the most consistently reported benefit, reflecting savings from no longer having to pay for school dinners, preparing packed lunches or a combination of both. Time savings were also commonly reported, particularly where families no longer needed to prepare packed lunches. Wider family-level behavioural impacts were more modest, with respondents often indicating that their child was trying new foods as a result of the policy, but this was not seen to translate into changes in household cooking habits.

4.4.1. Financial savings

The majority of survey respondents indicated that they have experienced cost savings as a result of the policy, as shown in Figure 10.

Figure 11: responses to the question “has the availability of a free school lunch had an impact on your family finances? (e.g. cost savings from not having to prepare packed lunches and/or pay for a school meal)” (n=1,517)



Description of figure 11: bar chart showing whether free school lunches have impacted family finances, with 77% reporting cost savings, 18% reporting no savings and 5% reporting that they do not know.

Reported savings were broadly consistent across most respondent groups. At least 71% of respondents in each group (including eFSM status, ALN status and location) said that their household had experienced some financial savings as a result of UPFSM. By income band, however, variation was more evident. Respondents from households earning below £10,000

per year were least likely to report savings (61%), compared with 77% to 83% across most other income groups. This may partly reflect the fact that some households in this income group may already have been receiving income-related means-tested FSM prior to the introduction of UPFSM and therefore experienced fewer additional financial savings from the policy. Lower reported school meal uptake among this group may also have contributed, as families whose child makes less use of the offer may have fewer opportunities to realise savings. However, it is not possible to determine from the survey data the extent to which these factors explain the variation in reported savings between income groups.

Reported savings peaked among respondents from households earning between £30,001 and £40,000 (86%) before declining slightly at higher income levels. These survey findings indicate that while financial benefits were widespread, they were most commonly reported among middle-income households.

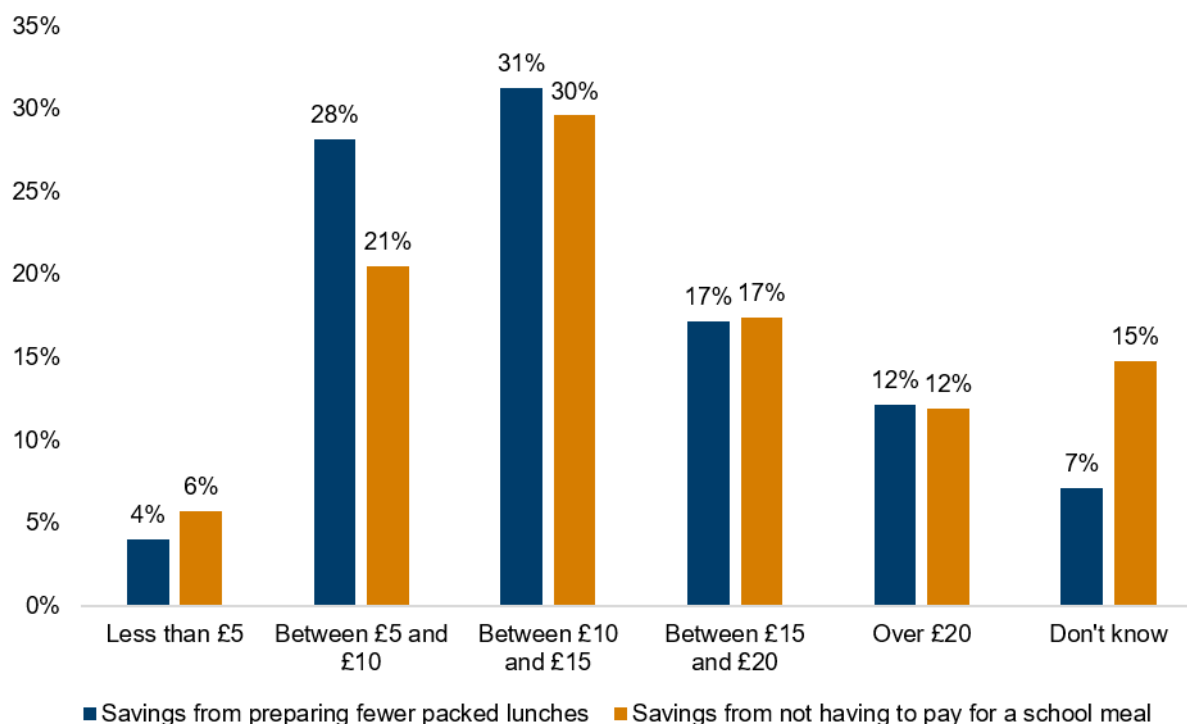
Respondents identified different sources of savings. Over a third (37%) of respondents reported savings from both reduced packed lunch preparation and not paying for school meals. A further 34% reported savings solely from reduced packed lunch preparation, while 28% reported savings solely from not paying for school meals. Differences across groups were relatively small; where they existed, this may simply reflect differences in lunchtime arrangements prior to the introduction of the policy.

Saving through a combination of no longer preparing packed lunches and no longer paying for school meals was the most common route to cost savings, reported by 37% of respondents. Differences across groups were limited, however, respondents whose child is not eligible for income-related means-tested FSM were slightly more likely to report combined savings (38%, compared with 32% of eFSM). This may reflect greater use of both packed lunches and school meals prior to the policy compared to those who were eligible for income-related means-tested FSM. Respondents with household incomes between £30,001 and £50,000 were also more likely to report combined savings (42%, compared with 32% to 35% across other income groups).

Among those saving through both routes, most survey respondents said they saved between £5 and £15 per week from each source, suggesting typical combined weekly savings in the range of £10 to £30.

Figure 11 below shows a clear alignment between savings from preparing fewer packed lunches and from no longer paying for school meals. Respondents who reported lower savings from packed lunches were likely to report similarly low savings from school meals, and the same pattern holds for higher savings bands. Overall, this consistency suggests that savings from the 2 sources tend to accumulate rather than offset one another.

Figure 12: responses to the question “approximately how much money do you now save each week from preparing fewer packed lunches?” and “approximately how much money do you now save each week from preparing fewer packed lunches?” where the respondents indicated saving through both methods (n=419)

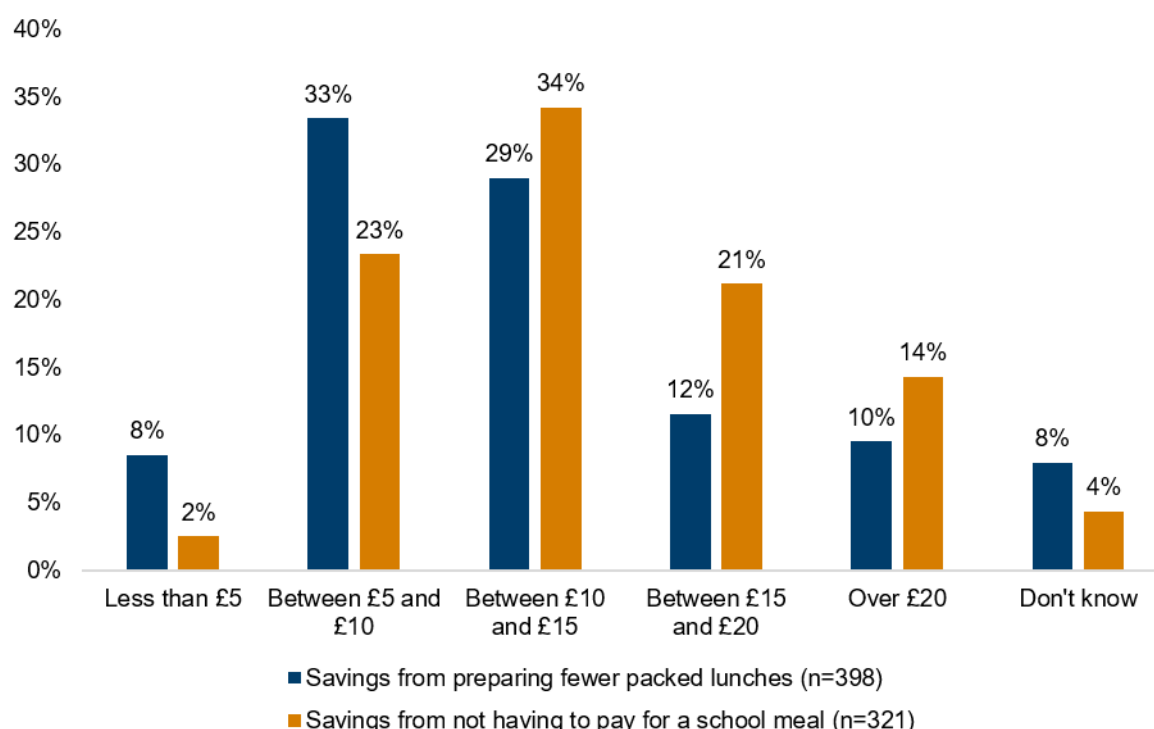


[Note 1]: Responses based on the average cost for 1 child in a typical school week

Description of figure 12: bar chart of weekly savings showing most save between £10 and £15, which includes 31% on packed lunches and 30% on school meals. By contrast, relatively few respondents reported savings of less than £5 (4% on packed lunches; 6% on school meals) or more than £20 per week (12% on packed lunches; 12% on school meals).

As shown in Figure 12, respondents who saved solely from no longer paying for school meals generally reported higher weekly savings than those saving solely from preparing fewer packed lunches. Savings from school meals were more concentrated in the £10 to £20 range, whereas savings from packed lunches were more concentrated in the £5 to £15 range, with fewer respondents reporting higher amounts. This indicates that, while both routes contribute to overall savings, school meal costs tend to account for a larger share.

Figure 13: responses to the question “approximately how much money do you now save each week from preparing fewer packed lunches?” and “approximately how much money do you now save each week from preparing fewer packed lunches?” where respondents indicated saving through only 1 method



[Note 1]: Responses based on the average cost for 1 child in a typical school week.

Description of figure 13: bar chart of weekly savings showing 33% save between £5 and £10 on packed lunches and 34% save between £10 and £15 on school meals.

Beyond direct financial savings, the policy was also associated with reduced financial worry for many respondents. Overall, 62% agreed or strongly agreed that they no longer worry about having enough money to pay for school meals, including 38% who strongly agreed. This perceived effect was less pronounced among respondents from higher-income households: 26% of those earning over £50,000 strongly agreed, compared with 45% to 51% across other income groups. This suggests that respondents from lower- and middle-income households were more likely than those from higher-income households to perceive a reduction in financial worry associated with school meal costs.

Reducing the need to prepare packed lunches also generated time savings. A majority of respondents (70%) agreed or strongly agreed that the policy saved them time. This was reported across all groups, although agreement was somewhat higher among parents and carers of a child without ALN (72%, compared with 60%), those not eligible for income-related means-tested FSM (73%, compared with 61%), and higher-income households (73% above £50,000, compared with 60% below £10,000).

Despite these reported financial and time benefits, there was more limited evidence from survey responses that the policy had reduced learner concern about money in school. Many respondents either neither agreed nor disagreed (32%) or reported no opinion (27%).

Among those expressing a view, more disagreed (23%) than agreed (18%) that their child worries less about money in school.

There was some variation by respondent groups. Parents and carers of a child eligible for income-related means-tested FSM were more likely to report reduced worry (26% compared with 13% among those not eligible), as were respondents from lower-income households (29% to 34% for incomes up to £30,000, compared with 7% above £50,000). This may be because these groups experienced greater financial concerns prior to the policy, making any subsequent changes more noticeable. However, the survey data cannot determine why these differences were observed.

4.4.2. Impacts on family life

As a school-based policy, the primary effects of UPFSM are expected to be experienced within the school day. However, survey findings indicate some wider effects for family life, particularly reduced parent and carer concern about their child's access to food and increased exposure to a wider range of foods. There was, however, limited evidence that these effects extend into the home environment in the form of changed household routines or behaviours such as cooking habits.

Around half of respondents (56%) agreed or strongly agreed that they worried less about whether their child was getting enough food during the school day. This pattern was consistent across demographic groups, with respondents more likely to agree than disagree regardless of ALN status, eFSM status, location or household income. This suggests that the policy has provided a broadly shared sense of reassurance for respondents.

Survey responses also suggest that learners may be trying new foods since the introduction of the policy. Overall, 58% of respondents agreed or strongly agreed that their child was trying new foods. This pattern was evident across demographic groups. However, parents and carers of a child with ALN (11% of respondents to this question) were less likely to report this change, with lower levels of strong agreement (17%, compared with 21% for parents and carers whose child does not have ALN) and higher levels of strong disagreement (19%, compared with 9% of respondents overall).

Despite these reported changes, there was little evidence from survey responses of a corresponding shift in household cooking practices. Respondents to the survey were most likely to neither agree nor disagree that their cooking habits had changed (29%), and overall disagreement outweighed agreement (39%, compared with 29%). This pattern was broadly consistent across all groups, although parents and carers of a child eligible for income-related means-tested FSM reported slightly higher levels of agreement and lower levels of disagreement than parents and carers of a child who is not eligible.

Taken together, these findings suggest that respondents were more likely to identify positive changes relating to their child's experiences during the school day than changes within the home environment. While some respondents perceived reductions in worry about access to food and increases in their child's exposure to new foods, these reported effects were not consistently associated with changes to household routines or cooking practices.

5. Conclusions

5.1. Summary of main findings

Survey findings suggest that the UPFSM policy is widely known and generally well supported by respondents. Nearly all survey respondents were aware of the policy, and many valued the principle of all learners receiving the same offer. The evidence presented in this report reflects the views and experiences of survey respondents and should be interpreted in light of the survey's non-representative nature. While it provides valuable insight into respondent experiences of UPFSM, it should not be assumed to reflect the experiences of all parents and carers in Wales.

Overall, survey respondents described UPFSM as having a positive impact, particularly in helping to reduce stigma around free school meals, supporting child health and wellbeing and improving their readiness to learn. Respondents also commonly identified benefits for family life, including reducing financial pressure and time savings associated with no longer having to prepare packed lunches or pay for school meals. Only a small minority expressed negative or mixed views, most commonly relating to whether the policy represented the best use of resources and whether it should be more targeted towards families with the greatest need.

Uptake of school meals was reported to be high among survey respondents, with almost all learners reported to be taking up at least 1 school meal per week and most eating school meals every day. Among respondents whose child was already in primary school when UPFSM was introduced, just under half said that their child now eats more school meals each week than before the introduction of the policy, while fewer than one in five reported a decrease. However, uptake patterns were not uniform. Reported participation was lower and, in some cases, declining among lower-income respondents, who were less likely to report increases in school meal uptake following the introduction of the policy. At the same time, reported uptake among younger children from lower-income families was higher than among older pupils, potentially pointing to early signs of a cohort effect that, if sustained, could lead to higher uptake over time.

Cost was the most commonly selected reason families chose school meals, while limited menu choice was the most frequently reported barrier, alongside perceived concerns about taste, food quality and portion size. These findings suggest that while the fact that the meal is free is an important enabler, uptake continues to depend on the quality, variety and acceptability of the meal offer.

A great majority of respondents felt that UPFSM had a positive impact on their child's health and wellbeing. Perceived benefits included increased access to a hot and balanced meal, reduced stigma, improved energy levels and better concentration for afternoon learning. Many respondents also felt their child enjoyed lunchtime more as a result of the policy. Perceptions of the dining environment and school food were generally neutral, although some respondents perceived modest improvements. Views were more mixed among respondents from higher-income households and those whose child has ALN.

Respondents also commonly perceived benefits for family life, including reduced financial pressure and time savings from no longer having to pay for school meals, prepare packed lunches, or both. Some also reported reduced concern about whether their child was getting enough food during the school day. However, there was limited evidence from survey responses that these perceived financial benefits translated into reduced worries about money among learners themselves. While views on impacts were broadly consistent across respondent groups, they were reported most frequently by respondents from middle-income households.

While the survey findings suggest that many respondents perceive UPFSM to be delivering meaningful benefits for themselves and their children, they also point to the importance of maximising uptake and continuing to improve the choice, variety and taste of school meals to ensure those benefits are realised as widely as possible.

5.2. Reflections

Findings from this survey provide evidence that UPFSM is becoming an established part of school life and that the policy is delivering a range of perceived benefits for learners and families. However, they also suggest that the relationship between entitlement to the meal and impact is not straightforward. The cost of school meals is only one of many factors that influence uptake.

These broader factors include menu choice, taste, portion size, food quality and the extent to which meals offered meet individual learner needs. These factors reinforce the importance of considering uptake as a mechanism through which wider benefits and aims of the policy can be realised.

Differences in how respondents experienced the policy were also evident. Positive impacts were reported across most groups, but uptake was lower and, in some cases, declining among lower-income households, despite these families potentially standing to gain the most from the financial and wellbeing benefits associated with taking up a school meal. At the same time, higher levels of uptake among younger learners from lower-income families may suggest that participation patterns are continuing to evolve as cohorts who have experienced the policy for longer progress through primary school. Understanding whether these patterns persist over time will be important for interpreting the longer-term impacts of the policy.

Survey findings also suggest that the perceived benefits of UPFSM are not experienced equally across all families. While positive impacts were reported across most groups, they were often strongest among households that may have faced greater financial pressures or barriers to food access prior to the introduction of the policy. This may suggest that respondents were more likely to perceive benefits where the policy represented a meaningful change to their child's access to food during the school day. Taken together, these findings highlight that extending entitlement alone does not ensure consistent uptake, and that a range of factors continue to influence whether learners take up school meals regularly.

5.3. Next steps

Building on the findings of the first Interim Report and informed by the evidence presented in this report, this sub-section identifies 3 main areas for further research in the final phase of the evaluation:

- patterns of uptake
- challenges potentially facing learners with ALN and in special school settings
- barriers and enablers to increasing local food procurement

Patterns of uptake: Despite generally high levels of awareness and uptake, survey findings from this report suggest that participation in UPFSM remains lower among some lower-income households, and in some cases, uptake appears to have declined. Further evidence would help to understand why some socio-economically disadvantaged families do not fully take up the universal offer and what actions are most effective in supporting sustained participation.

Learners with ALN: While parents and carers generally reported neutral or modestly improved perceptions of school food and lunchtime experiences, further research is needed to better understand how the expansion of provision is affecting learners with ALN, particularly in special school settings. This will help to build an understanding of how lunchtime environments and delivery arrangements support or constrain participation and uptake among this group of learners.

Local procurement: While early research activities carried out in the first Interim Report explored changes to food sourcing and procurement, further research is required to understand how these practices are evolving over time. Local procurement is a specific policy aim of UPFSM and the evaluation provides an important opportunity to explore local procurement arrangements. It is also important to understand how schools and LAs are adapting their approaches to support ongoing UPFSM delivery in light of the introduction of the new Healthy Eating Regulations, due to come into effect in October 2026.

Annex 1: Methodological annex

Annex 1.1: Survey design

The survey questions were designed mainly to understand whether families were taking up a school meal following the introduction of UPFSM, rather than focusing only on how the policy was being delivered or implemented in schools. The survey was largely made up of quantitative questions, with a few optional open-text questions where appropriate. Survey questions were grouped under specific subthemes:

- household and learner characteristics
- awareness of the policy
- the impact of the policy on school life
- the impact of the policy on child health and wellbeing
- the impact of the policy on families

The survey was piloted prior to launch with researchers at Arad Research who were not involved in the project but who had primary-aged children attending school in Wales. The survey was tested by 3 researchers who provided comments which were addressed before the official launch.

Annex 1.2: Survey distribution and limitations

The parent and carer survey was launched on 7 October 2025 and closed on 10 December 2025, receiving 1,517 responses. The survey was administered via the survey platform Forsta.

All 1,199 primary schools in Wales, including special schools with primary aged learners, were invited to take part in the school survey. Schools were invited to take part in the survey via email. Headteachers of all schools with primary aged learners were sent an email asking them to share the survey with parents and carers via their usual communication channels. A link to the survey was included, as well as a QR code which could be scanned. Emails were also sent directly to headteachers of schools involved in case studies by the relevant researcher.

Reminders were sent on 20 October 2025, 10 November 2025 (accounting for half term the final week of October) and 24 November 2025. Prior to each reminder, responses were reviewed by school to avoid contacting schools that had already shared the survey.

The survey was shared with all schools, as opposed to following a targeted sampling methodology, to increase the opportunity for parents and carers to respond to the survey and share their views on the policy. A downside of this approach was that it limited the opportunity for targeted follow-ups with underrepresented groups. Efforts, however, were made to monitor the geographic distribution of responses to ensure a broad and inclusive sample.

A limitation of this approach is the potential for non-response bias. As participation was self-selected, respondents may differ systematically from those who did not respond. For example, individuals with stronger views or greater digital access may have been more likely to participate. As a result, the findings may not be fully representative of the wider population invited to take part.

Annex 1.3: Survey analysis

Following the closure of the survey, quantitative data were exported from Forsta into Excel for cleaning and analysis. Descriptive analysis was conducted using pivot tables and Excel functions including COUNTIF, COUNTIFS, and VLOOKUP.

Where relevant, statistical tests were conducted to examine differences between sub-groups. Full results are presented in Annex B. There were 4 comparator groups used in statistical testing:

- whether the learner has additional learning needs (ALN)
- whether the family are eligible for free school meals (eFSM)
- whether the school attended by the learner is in a rural or urban area
- the total household income of the family, before tax and including any benefits.

Qualitative responses were thematically coded. Coding involved identifying overall sentiment and main themes within responses. To support inter-coder reliability, after the initial coding a separate researcher reviewed the analysis and resolved any discrepancies.

The analysis relies on responses to the survey for the ALN, eFSM and household income breakdowns. For household income, respondents were given a 'prefer not to say' option which was chosen by 272 respondents. Their responses were excluded from the household income descriptive statistics.

Urban/rural classification was derived by matching reported school names to school identifiers and linking these to Office for National Statistics urban/rural classifications (published 25 January 2022). Sufficient information was not provided by 36 respondents to enable this matching and are excluded from urban/rural breakdowns.

Annex 2: Survey response profile

This section summarises the profiles of the complete survey responses included in the analysis. Complete responses to the survey were received across 19 LAs. Incomplete responses were not incorporated into analysis to ensure that all participants were consenting to submitting their final answers.

Table 2 outlines the distribution of responses across the 19 LAs, compared with the proportion of schools in Wales in each LA.

Table 2: survey responses per LA

LA	Number of responses	Percentage of responses	Percentage of schools in Wales in the LA
Blaenau Gwent	33	2%	2%
Bridgend	7	0%	4%
Caerphilly	22	1%	6%
Cardiff	280	18%	8%
Carmarthenshire	0	0%	8%
Ceredigion	0	0%	3%
Conwy	86	6%	4%
Denbighshire	115	8%	4%
Flintshire	7	0%	5%
Gwynedd	2	0%	7%
Isle of Anglesey	41	3%	3%
Merthyr Tydfil	159	10%	2%
Monmouthshire	33	2%	3%
Neath Port Talbot	30	2%	4%
Newport	240	16%	4%
Pembrokeshire	8	1%	4%
Powys	18	1%	6%
Rhondda Cynon Taf	347	23%	7%
Swansea	0	0%	6%
The Vale of Glamorgan	29	2%	4%
Torfaen	36	2%	2%
Wrexham	24	2%	5%

Tables 3 to 5 provide an overview of the distribution of survey respondent profiles across several demographic traits, covering ALN status, eligibility for eFSM, whether the learner attends an urban or rural school, and household income. Information on ALN status, eFSM eligibility and household income was self-reported by respondents and was not independently verified.

Table 3: survey responses per whether the learner has ALN

	Number of responses	Percentage of responses
ALN	163	11%
Not ALN	1,261	83%
Prefer not to say	39	3%
Don't know	54	4%

Table 4: survey responses per whether the learner is eligible for means tested FSM (eFSM)

	Number of responses	Percentage of responses
eFSM	445	29%
Not eFSM	946	62%
Don't know	126	8%

Table 5: survey responses per whether the learner attends an urban or rural school

	Number of responses	Percentage of responses
Rural	373	25%
Urban	1,107	73%
Not stated ¹	37	2%

Table 6: survey responses per household income, before tax and including benefits

	Number of responses	Percentage of responses
Below £10,000	100	7%
£10,001-£20,000	170	11%
£20,001-£30,000	174	11%
£30,001-£40,000	160	11%
£40,001-£50,000	143	9%
Above £50,000	498	33%
Prefer not to say	272	18%

¹ Whether the learner attends an urban or rural school was determined based on the school name given in the survey, the school name was not given in 37 responses

Annex 3 Statistical tests

Annex 3.1: Introduction

Statistical tests were conducted to assess whether selected outcomes varied across survey respondent characteristics. The purpose of this analysis was to examine whether the distribution of responses differed between groups and to identify whether any observed differences were statistically significant, beyond what might be expected by chance alone.

The analysis focused on the following UPFSM outcomes:

- Household savings
- Perceived health and wellbeing of children

These outcomes were selected because they represent core intended impacts of the policy and were measured using categorical survey response options.

The tests were conducted to observe differences in outcomes across the following survey respondent characteristics:

- Comparison across household income bands
- Comparison between urban and rural respondents
- Comparison across households with children who are eligible for income-related means tested FSM and those who were not
- Comparison across households with children with ALN and those who do not

Annex 3.2: Methods

As both the outcomes and comparison variables were categorical in nature, chi-squared tests of independence were used to assess whether there was an association between each outcome and the respondent characteristic being examined. Alongside the chi-squared test, Cramér's V was calculated for each comparison to provide a standardised measure of effect size. This indicates the strength of any association identified, independent of sample size.

The chi-squared test assesses whether differences in response distributions across groups are statistically significant. For this study, statistical significance was assessed using the 5% level.

Cramér's V provides an indication of the strength of the association where a statistically significant result is found. For this study, results were interpreted as follows:

- Values around 0.10 indicate a small association
- Values around 0.30 indicate a medium association
- Values around 0.50 or above indicate a large association

It is important to note that these tests do not indicate the direction of the relationship or imply causality. They simply identify whether response patterns differ between groups.

Additionally, as certain categories had a low number of observations in specific bands, there are occasions where certain groups are combined. This is to provide additional robustness to the observed sample sizes in each category to provide greater confidence to the results produced.

Statistical tests were run using R-studio for the following questions and respondent characteristics (full questions available in Annex C Survey questionnaire):

- q12 Overall, has the number of school lunches that your child has each week changed since the UPFSM policy was implemented? (*ALN, eFSM, Urban/Rural, household income*)
- q13 Why do you, as a family, choose school lunches, whether every day or on selected days? (*household income*)
- q14 Why do you, as a family, choose not to have school lunches, whether every day or on selected days? (*Urban/Rural*)
- q15b Overall, how would you rate the school lunches on offer at your child's school in terms of health and nutrition? (*eFSM*)
- q16c Approximately how much money do you now save each week from preparing fewer packed lunches? (*ALN, eFSM, Urban/Rural, Household income*)
- q16d Approximately how much money do you now save each week from not having to pay for school lunches? (*ALN, eFSM, Urban/Rural, Household income*)
- q17a Kindly review the following statements and select how far you agree or disagree that the UPFSM policy has impacted your household in the areas listed below: I spend less money on buying or preparing lunch for my child (*eFSM, Urban/Rural*)
- q18 Kindly review the following statements and select how far you agree or disagree that the UPFSM policy has impacted on your primary school aged child in the areas listed below. (*ALN, eFSM, Urban/Rural, household income*)
- q19 What impacts, if any, do you think the introduction of the UPFSM has had on the health and wellbeing of your child? (*household income*)
- q21 Has your child mentioned any changes to the following since UPFSM was introduced? Noise in the dining room (*ALN, eFSM*)
- q21 Has your child mentioned any changes to the following since UPFSM was introduced? The dining environment (*ALN, eFSM*)

Annex 4: Survey script

Introduction

Hello!

Thank you for taking part in this survey which aims to gather your views on the Universal Primary Free School Meals (UPFSM) policy – the Welsh Government policy that offers free school meals to all primary aged children in local authority maintained schools in Wales.

This survey is being conducted by ICF, on behalf of the Welsh Government, as part of an evaluation of the UPFSM policy. The evaluation aims to gather insights into the

implementation of the UPFSM policy to date and identify any emerging impacts. By sharing your experiences, you can help us identify what works well and what improvements can be made to the UPFSM policy to further benefit children, families and schools.

The survey includes questions about:

- Your views and those of your child(ren) on the quality and choice of school meals and the extent to which they are healthy and nutritious.
- Any impacts having access to free school meals has had on your child and your family.

If you have more than one child in primary school, please answer the survey questions based on your eldest child in primary school only.

We gratefully ask that you complete all sections but please be assured that all text boxes are optional. We would be very keen to hear more context if you are able but please do not feel the need to add more detail in the text boxes.

Your responses will be anonymous and treated in confidence. ICF will use the information gathered to produce a report that will be published on the Welsh Government website. This report will not include any information that could be used to identify individual participants. Further information on how the collected data will be used is available in the privacy notice which can be read [here \(link\)](#).

Thank you again for your precious time to complete this survey.

The Welsh Government UPFSM Evaluation Team

Consent

I have read the information above and agree to participate in this evaluation.

- Yes
- No

Profile data

q1 Do you have a primary school-aged child, or children, in primary school in Wales?

- Yes
- No

q2 How many children in your household are currently in primary school?

- 1
- 2
- 3

- 4 or more

If more than one child:

As you have more than one child in primary school, please answer the following questions based on your **eldest child in primary school only**.

q3 What school year is your child currently in?

- Reception
- Year 1
- Year 2
- Year 3
- Year 4
- Year 5
- Year 6

q4 Does your child have additional learning needs (ALN)?

- Yes
- No
- Prefer not to say
- Don't know

q5 Is your child eligible for means-tested Free School Meals (eFSM*)?

**A child may be eligible for eFSM if their parent or carer receives certain benefits, including Universal Credit (subject to an earned income threshold), Income Support, or related benefits.*

- Yes
- No
- Don't know

q6 In which local authority does your child go to school?

(List of all Welsh local authorities)

q7 What's the name of the school?

(Open text)

The impact of Universal Primary Free School Meals policy in Wales

q8 Before reading this survey, were you aware that all primary-aged children attending a local authority maintained school in Wales have access to a free school lunch?

- Yes
- No

q9 What do you think about this?
(Open text)

q10 On average, how many school lunches does your child eat each week?

- 0 / None
- 1
- 2
- 3
- 4
- 5
- Don't know

q11 Was your child eligible for means-tested Free School Meals (eFSM) prior to September 2022?

- Yes
- No
- Don't know

q12 Overall, has the number of school lunches that your child has each week changed since the UPFSM policy was implemented?

- My child now has **more** school meals each week
- My child has the **same number** of school meals each week as they did before
- My child now has **fewer** school meals each week
- Don't know

q12a Please use the space below to expand on your answer.
(Open text)

q13 Why do you, as a family, choose school lunches, whether every day or on selected days?

Please tick all that apply.

- Because it's free
- The choice of meals available

- The quality of food available
- It is more convenient than preparing a packed lunch
- My child likes the taste of the food
- My child finds the meals filling
- The meals give my child energy
- My child's friends / classmates have a school dinner
- Don't know
- Other (please specify)

q13a Please use the space below to expand on why you, as a family, choose school lunches.

(Open text)

q14 Why do you, as a family, choose **not** to have school lunches, whether every day or on selected days?

Please tick all that apply.

- The choice of meals available
- The quality of food available
- My child does not like the taste of the food
- Dining room environment (atmosphere, noise, queues, behaviour etc.)
- My child does not find the meals filling enough
- The meals do not give my child enough energy
- My child prefers to have a packed lunch
- My child's friends / classmates have a packed lunch
- Don't know
- Other (please specify)

q14a Please use the space below to expand on why you, as a family, choose not to have school lunches.

(Open text)

q15a Overall, how would you rate the school lunches on offer at your child's school in terms of **choice / range of meal options**?

- Good choice
- Adequate choice

- Poor choice
- Don't know / no opinion

q15b Overall, how would you rate the school lunches on offer at your child's school in terms of **health and nutrition**?

- Very healthy and nutritious
- Fairly healthy and nutritious
- Not healthy and nutritious
- Don't know / no opinion

q16 Has the availability of a free school lunch had an impact on your family finances?

- Yes, some cost savings
- No
- Don't know

q16a You answered that the availability of a free school lunch has not impacted on your family finances. Please provide some details.

(Open text)

q16b Have these cost savings been as a result of:

Please tick all that apply.

- No longer having to pay for as many school lunches each week
- No longer having to prepare as many packed lunches each week
- Other (please specify)

q16c Approximately how much money do you now save each week from preparing fewer packed lunches?

- Less than £5
- £5–£10
- £10–£15
- £15–£20
- Over £20
- Don't know

q16d Approximately how much money do you now save each week from not having to pay for school lunches?

- Less than £5
- £5–£10
- £10–£15
- £15–£20
- Over £20
- Don't know

q17 Kindly review the following statements and select how far you agree or disagree that the UPFSM policy has impacted your household in the areas listed below.

Scale: Strongly agree / Agree / Neither agree nor disagree / Disagree / Strongly disagree / No opinion

- I spend less money on buying or preparing lunch for my child
- Our household meals or cooking habits have changed
- I don't have to worry about whether my child has enough food during the day
- It saves time that I used to spend making a packed lunch
- It means I don't have to worry about having enough money to pay for school lunch
- It has helped my relationship with the school's staff
- I feel less concerned about my child picking up on any financial concerns

q18 Kindly review the following statements and select how far you agree or disagree that the UPFSM policy has impacted on your primary school-aged child in the areas listed below.

Scale: Strongly agree / Agree / Neither agree nor disagree / Disagree / Strongly disagree / No opinion

- My child enjoys school lunchtime more
- My child is trying new foods
- My child has more energy for afternoon activities
- My child is less worried about money in school
- My child is less worried about food in school
- My child can concentrate better on school and lessons
- My child enjoys school more

q19 What impacts, if any, do you think the introduction of the UPFSM has had on the health and wellbeing of your child?

- Significant positive impact
- Some positive impact
- Made no difference
- Some negative impact
- Significant negative impact
- Don't know / no opinion

q19a Please use the space below to expand on your answer.
(Open text)

q20 Do you think offering a free school meal to all children has reduced any stigma that may be associated with means-tested Free School Meals?

- Yes
- No
- Don't know

q20a Please use the space below to expand on your answer.
(Open text)

q21 Has your child mentioned any changes to the following since UPFSM was introduced?

Scale: Much better / A little better / The same / A little worse / Much worse / Don't know

- Noise in the dining room
- The dining room environment
- Lunch queues
- Time available for lunch
- Food choices
- Food quality
- Food taste
- Portion sizes
- Catering for specific dietary needs
- Staffing levels in the dining room

- Litter from packed lunch wrappers
- Other (please specify)

q22 Is there anything else you would like to tell us about how UPFSM has impacted your child's experience of school?

(Open text)

q23 Is there anything else you would like to tell us about how UPFSM has impacted you as a parent or carer?

(Open text)

q23b If there is anything else you would like to tell us about how UPFSM has had an impact on your other child, or children's, experience of school?

(Open text)

Household profile

q24 What is your household composition?

- Single parent / carer
- Two parents / carers
- Other (please specify)
- Prefer not to say

q25 Please tell us your total annual household income (before tax, including any benefits):

- Below £10,000
- £10,001–£20,000
- £20,001–£30,000
- £30,001–£40,000
- £40,001–£50,000
- Above £50,000
- Prefer not to say

q26 What is your ethnic background?

(Standard UK census categories as listed in the survey)

q27 Do you consider yourself to have a disability, impairment or health condition?

- Yes
- No
- Prefer not to say

q28 What is the main language spoken in your home?

- English
- Welsh
- Other (please specify)
- Prefer not to say

q29 Does the child you have answered this survey about have any specific dietary needs?

- Halal
- Kosher
- Vegetarian
- Vegan
- Allergies
- Other (please specify)
- None