



## First annual survey of take up of school meals in England

Michael Nelson and Jo Nicholas

### Contents

|   |           |
|---|-----------|
| <b>KEY FINDINGS .....</b>                         | <b>3</b>  |
| <b>1 INTRODUCTION .....</b>                       | <b>4</b>  |
| <b>2 METHODS.....</b>                             | <b>5</b>  |
| 2.1 SURVEY DESIGN.....                            | 5         |
| 2.2 QUESTIONNAIRE TESTING .....                   | 5         |
| 2.3 SAMPLE SELECTION .....                        | 5         |
| 2.4 DATA ENTRY AND CODING.....                    | 6         |
| 2.5 STATISTICAL ANALYSIS .....                    | 6         |
| 2.6 QUALITY ASSURANCE.....                        | 6         |
| <b>3 RESULTS.....</b>                             | <b>6</b>  |
| 3.1 NUMBER AND TYPE OF RESPONDENTS; COVERAGE..... | 6         |
| 3.2 SCHOOL FOOD CATERING PROVIDERS .....          | 9         |
| 3.3 TAKE UP OF SCHOOL MEALS.....                  | 10        |
| 3.4 FREE SCHOOL MEAL (FSM) PROVISION.....         | 13        |
| 3.5 COST OF SCHOOL MEALS.....                     | 13        |
| 3.6 FACILITIES FOR FOOD PREPARATION.....          | 14        |
| 3.7 CHANGE IN DEMAND.....                         | 15        |
| 3.8 ABILITY TO MEET NEW STANDARDS.....            | 19        |
| <b>4 DISCUSSION.....</b>                          | <b>20</b> |
| <b>5 REFERENCES .....</b>                         | <b>21</b> |

## List of Tables

|  |    |
|--|----|
| TABLE 1. TOTAL NUMBER OF PRIMARY AND SECONDARY SCHOOLS IN THE LOCAL AUTHORITIES IN ENGLAND CATERED FOR BY THE PROVIDERS WHO RESPONDED TO THE SURVEY, THE NUMBER OF SCHOOLS FOR WHICH THEY PROVIDED CATERING SERVICES, AND THE NUMBER OF PUPILS ATTENDING THE SCHOOLS IN WHICH CATERING SERVICES WERE PROVIDED, BY REGION ..... | 7  |
| TABLE 2. NUMBER OF LOCAL AUTHORITIES IN ENGLAND FOR WHICH INFORMATION ON CATERING PROVISION WAS OBTAINED, BY REGION.....   | 7  |
| TABLE 3. DISTRIBUTION OF PRIMARY AND SECONDARY SCHOOLS IN ENGLAND BY REGION: ANNUAL SCHOOL CENSUS (JANUARY 2005) AND SCHOOL FOOD TRUST SURVEY (MAY 2006).....  | 8  |
| TABLE 4. ELIGIBILITY FOR FREE SCHOOLS MEALS IN PRIMARY AND SECONDARY SCHOOLS BY REGION: ANNUAL SCHOOLS CENSUS JANUARY 2005 AND SCHOOL FOOD TRUST SURVEY (MAY 2006).....  | 9  |
| TABLE 5. NUMBER AND PERCENTAGE OF TYPES OF LA SCHOOL FOOD PROVIDERS IN PRIMARY AND SECONDARY SCHOOLS IN ENGLAND, BY REGION.....  | 9  |
| TABLE 6. TAKE UP OF SCHOOL MEALS (%) IN PRIMARY AND SECONDARY SCHOOLS IN ENGLAND, BY REGION, 2005-2006 AND 2004-2005 .....   | 10 |
| TABLE 7. MEAN COST OF A TWO-COURSE MEAL, INGREDIENT COST, AND LABOUR COST IN 2005-2006, AND COST OF A TWO-COURSE MEAL IN 2004-2005, IN PRIMARY AND SECONDARY SCHOOLS IN ENGLAND, BY REGION .....   | 14 |
| TABLE 8. FACILITIES FOR FOOD PREPARATION IN PRIMARY AND SECONDARY SCHOOLS IN ENGLAND (PERCENT OF SCHOOLS), BY REGION .....   | 15 |
| TABLE 9. REPORTED CHANGE IN DEMAND FOR SCHOOL MEALS FROM 2004-2005 TO 2005-2006, PRIMARY AND SECONDARY SCHOOLS IN ENGLAND.....   | 16 |
| TABLE 10. PERCENTAGE OF CATERERS IDENTIFYING PARTICULAR REASONS BELIEVED TO HAVE CONTRIBUTED TO A FALL IN DEMAND FOR SCHOOL MEALS IN 2005-2006, PRIMARY AND SECONDARY SCHOOLS IN ENGLAND.....  | 17 |
| TABLE 11. PERCENTAGE OF CATERERS IDENTIFYING PARTICULAR REASONS BELIEVED TO HAVE CONTRIBUTED TO A STEADY OR INCREASED DEMAND FOR SCHOOL MEALS IN 2005-2006, PRIMARY AND SECONDARY SCHOOLS IN ENGLAND.....  | 18 |
| TABLE 12. CHALLENGES IDENTIFIED BY LA CATERING PROVIDERS IN MEETING THE DfES STANDARDS FOR SCHOOL FOOD.....  | 19 |

## List of Figures

|  |    |
|--|----|
| FIGURE 1. CHANGE IN TAKE UP (PERCENTAGE POINTS) IN 95 PRIMARY SCHOOLS BETWEEN 2004-2005 AND 2005-2006, BY LOCAL AUTHORITY IN ENGLAND. ....   | 12 |
| FIGURE 2. CHANGE IN TAKE UP (PERCENTAGE POINTS) IN 74 SECONDARY SCHOOLS BETWEEN 2004-2005 AND 2005-2006, BY LOCAL AUTHORITY IN ENGLAND. .... | 12 |

## Key findings

1. Responses were received from 98 (65%) of 150 Local Authority catering providers in England. This covered responses relating to 65% of primary schools nationally and 56% of secondary schools nationally. The final sample was representative of the regional distribution of schools and is assumed to be nationally representative. Findings related mainly to the 2005-2006 financial year; selected data for the 2004-2005 financial year were collected for comparison.
2. Just over 60% of catering services reported for 2005-2006 were provided by Direct Service Organizations/Local Authority Catering Providers, and between one-third (in primary schools) and one-fifth (in secondary schools) being provided by contractors appointed by the LA.
3. Take up of school meals in 2005-2006 was 42.3% in primary schools and 42.7% in secondary schools. This contrasts with values of 44.9% in both primary and secondary schools in the previous financial year. This represents a 5.8% fall in provision in primary schools and a 4.9% fall in secondary schools. It represents a drop in take up amongst primary and secondary school pupils nationally of 2.6 and 2.2 percentage points, respectively (i.e. 2.6 percent fewer primary pupils and 2.2 percent fewer secondary pupils nationally had school meals).
4. Free school meal eligibility was 18% in primary schools and 17% in secondary schools. There was no association between the eligibility for free school meals and changes in take up between 2004-2005 and 2005-2006.
5. The price of a school meal was £1.54 in primary schools and £1.62 in secondary schools. This represented an average increase of 4% on the previous year's price. Roughly one-third of the price in primary schools and about 42% of the price in secondary schools was for ingredients. Close to half of the price covered labour costs.
6. 72% of primary schools could prepare all food from scratch, but 5% had only regeneration facilities. 20% (about 3500 schools nationally) had no facilities for preparation or regeneration. 5% (about 900 primary schools in England) served cold food only, mainly in the South East and South West. The majority of secondary schools could prepare all food from scratch (96%), and 3% had regeneration facilities only.
7. 72% of primary school providers and 56% of secondary school providers reported a fall in take up in the previous year. On the other hand, 8% of primary and 15% of secondary school providers reported an increase in demand.
8. In early 2006, the SFT commissioned Sustain to undertake a survey of LA catering providers (the same providers who were later asked to respond to the survey on take up) to investigate factors believed by caterers likely to be associated with changes in take up. Of the 131 school catering providers who responded, 128 said they believed that they would be able to meet the new standards for foods when they come into force in September 2006 – only 3 said they would not. Of the 125 catering providers who responded to questions about nutrient-based standards, 120 believed that they would be able to meet the nutrient based standards when they come fully into force by September 2009.

## **1 Introduction**

The School Food Trust (SFT) has been established to support the implementation of changes in school food in England consistent with new standards for school food published on 19 May 2006 by the Department for Education and Skills (DfES). One of the key targets is an increase in take up of school meals of 4 percentage points by March 2008 and by 10 percentage points by autumn 2009. In order to assess this target, the SFT needed to determine the take up of school meals nationally in an annual survey.<sup>a</sup>

In March 2006, PricewaterhouseCoopers (PwC) was commissioned by the SFT to carry out a survey of school food providers in all Local Authorities (LAs) in England by the end of May 2006. The Local Authority Caterers Association (LACA) was a collaborating partner. Many of LACA's members are LA food providers and LACA provided up-to-date contact details. In addition, they provided input on aspects of questionnaire design. The SFT greatly appreciated the collaborative approach of LACA and its contribution to the success of the survey. The SFT is also grateful to Gavan Conlon of PricewaterhouseCoopers for his contribution to the survey design and his supervision of the data collection and preliminary analyses.

Because the data were collected by LAs, the findings do not include the characteristics of schools who arrange catering services from providers who do not operate within the local authority structure (e.g. small private catering companies) or schools who provide their own services in-house.

The aims of the present survey were to assess:

- levels of take up of school meals nationally over the 2005-2006 financial year
- levels of take up in the 2004-2005 financial year
- the proportion of children eligible for free school meals (FSM)
- the capacity of schools to prepare food from scratch on the premises or simply to regenerate food, or neither
- the food and catering costs associated with the provision of school meals in 2004-2005 and 2005-2006
- the main type of provision (Direct Service Organisation (DSO)/Local Authority Catering Provider (LACP), contractor or other provision)
- factors believed by LA school food providers to be associated with decreases or increases in take up over the last year.

The data were collected separately for primary and secondary schools.

The data provide a baseline figure for take up of school meals in primary and secondary schools for 2005-2006. The aim is to conduct this local authority survey annually in April for the next three years in order to evaluate changes in take up. The core questions in the survey will remain essentially the same, but additional questions may be added according to the needs of the SFT, LACA and other interested parties (e.g. DfES, DH). The timing of the survey coincides with the annual assessment by LAs of their turnover and take up over the previous financial year (April-March). This provides a stable assessment of annual take up which is free from the seasonal variation known to be associated with take up (highest in the Autumn term, lowest in the Summer term) and avoids the problems of interpretation associated with findings based on a single census date chosen at one point in the school year.

---

<sup>a</sup> Other interim surveys may also be needed on a more localised basis to evaluate the effect of specific interventions in a given set of schools.

This report provides information (separately for primary and secondary schools) on:

- Take up of school meals in 2005-2006 and in 2004-2005
- Changes in take up between 2004-2005 and 2005-2006
- The percent of children eligible for free school meals<sup>b</sup>

Two other recent surveys by SFT<sup>1</sup> and DfES<sup>2</sup> on school food provision, and work on current practice commissioned by SFT (carried out by Sustain)<sup>3</sup> are referred to in the findings. The present report also makes reference to the findings from two recent national surveys of provision and consumption of school meals were carried out in primary schools<sup>4</sup> (April-June 2005) and secondary schools<sup>5</sup> (November-December 2003).

## **2 Methods**

### **2.1 Survey design**

The survey was designed jointly by researchers from the School Food Trust and PricewaterhouseCoopers. There were 21 questions asked on provision and food costs in primary and secondary schools separately, and two further questions asking respondents to highlight (and rank) the reasons for changes in school meal take up. The survey instrument is attached to this document.

### **2.2 Questionnaire testing**

Prior to administering the survey, the questionnaire was sent to several senior members of LACA, who responded with comments and suggestions for the re-wording of the instrument and clarification of terms. In addition, a meeting was held with the current Chair of LACA to develop the questionnaire and to refine the questions to ensure that the language and terminology used was specific and appropriate for ensuring accurate and comprehensive responses from recipients.

### **2.3 Sample selection**

Of the 150 local authorities, the questionnaire was sent in the first instance to caterers or officials representing 147 of the local authorities (excluding Buckinghamshire and Swindon, where no catering contact was available, and Isles of Scilly, where there are no secondary schools).

We relied on two sources of information for constructing the initial list of recipients. The first was the Local Authority Caterers Association's membership list which had been augmented to identify members who were also Heads of Catering in specific authorities. The 75 respondents identified were sent a copy of the questionnaire. In addition to the LACA membership list, we had contact information from the SFT and DfES surveys undertaken in 2005.<sup>1 2</sup> We used this information to supplement the LACA contact information. There were two local authorities for which no contact information was available.

The initial survey was sent out by post and email on the 11<sup>th</sup> April. A reminder e-mail was sent on 24<sup>th</sup> April. At the end of a further week, all of the non-respondents were telephoned on at least two occasions and sent additional email where the initial contact may have been inappropriate. By May 24<sup>th</sup>, our deadline for data collection, we had received responses

---

<sup>b</sup> Prior to 2001, the numbers eligible for a free school meal were those pupils who had, or whose parents had, satisfied the relevant authority that they were receiving Income Support (IS) or income based Jobseekers Allowance (IBJSA) or support provided under Part 6 of the Immigration and Asylum Act 1999. From 2001 onwards this definition was modified to include only pupils where parents had indicated that they wished their child to have a free meal and had confirmed benefit receipt with the LEA or school.

covering 98 local authorities (65%). This response rate is satisfactory for interpreting the findings nationally, including regional variations.

Initial testing suggested that the questionnaire would require 30 minutes to complete, but many respondents indicated that it took significantly longer, especially where recipients were responsible for more than one LA. The initial distribution was during Easter holidays, which may also have had an adverse effect on response rates.

## **2.4 Data entry and coding**

The data collected on written or electronic versions of the questionnaire were entered by researchers at PwC. Where information was missing or unavailable, follow up contact was made with the respondent to complete the information, if possible.

## **2.5 Statistical analysis**

Statistical analysis for the present report was carried out using Microsoft Excel and the Statistical Package for the Social Sciences<sup>6</sup> (SPSS). Analyses were undertaken in three groups according to the weighting that was appropriate. First, estimates of take up were weighted by the numbers of pupils on roll in the schools covered by the catering services. Second, estimates of costs of providing meals were weighted by the number of meals provided. Finally, estimates of catering characteristics (e.g. facilities for food preparation) were weighted by the number of schools catered for by the service provider within each LA. The findings therefore reflect the correct balance of provision across England and do not give undue emphasis to the findings from smaller schools, LA providers or caterers.

## **2.6 Quality assurance**

The data entered were double checked for accuracy and consistency by the lead researchers for 100% of the data entry. Respondents were contacted wherever possible to complete missing data on the questionnaires. Where queries or inconsistencies occurred, information providers from the relevant LA were contacted for clarification and changes made where appropriate.

# **3 Results**

## **3.1 Number and type of respondents; coverage**

Information was obtained for 98 local authorities (65% of 150 LAs). The total number of schools in the LAs served by the catering providers, the number (and percentage) actually catered for by the providers, and the number of pupils on roll in the schools catered for is shown for primary and secondary schools by region in Table 1. Overall, the survey covered catering provision for 10,796 primary and 1,103 secondary schools with over 3.5 million pupils on roll. This corresponds to approximately 61% of primary schools and 33% of secondary schools nationally.<sup>c</sup> Included in this overall response is information from 2 large commercial catering companies who between them serve 15 local authorities. The survey achieved an overall coverage of 65% of local authorities nationally.

---

<sup>c</sup> These percentages use the DfES Annual School Census, Jan 2005 (Table 11),<sup>7</sup> recording 17,642 primary schools and 3,385 secondary schools in England. The lower coverage of secondary schools is attributable to the higher proportion (compared with primary schools) that make their own arrangements for catering services that do not directly involve the LA (19% of secondary schools reported providing services in-house).<sup>5</sup>

**Table 1. Total number of primary and secondary schools in the Local Authorities in England catered for by the providers who responded to the survey, the number of schools for which they provided catering services, and the number of pupils attending the schools in which catering services were provided, by region**

| Region           | Primary       |                           |             | Number of pupils attending schools | Secondary     |                           |             | Number of pupils attending schools |
|------------------|---------------|---------------------------|-------------|------------------------------------|---------------|---------------------------|-------------|------------------------------------|
|                  | Schools in LA | Schools in LA catered for |             |                                    | Schools in LA | Schools in LA catered for |             |                                    |
|                  |               | n                         | %           |                                    |               | n                         | %           |                                    |
| North East       | 618           | 597                       | 96.6        | 144142                             | 110           | 89                        | 80.9        | 96429                              |
| North West       | 1475          | 1316                      | 89.2        | 288942                             | 254           | 148                       | 58.3        | 154182                             |
| Yorkshire/Humber | 1459          | 1343                      | 92.0        | 287034                             | 224           | 151                       | 67.4        | 151717                             |
| East Midlands    | 1146          | 1105                      | 96.4        | 216195                             | 195           | 113                       | 57.9        | 131621                             |
| West Midlands    | 1535          | 1348                      | 87.8        | 330791                             | 348           | 213                       | 61.2        | 191970                             |
| East of England  | 1014          | 968                       | 95.5        | 219538                             | 129           | 99                        | 76.7        | 111210                             |
| Inner London     | 384           | 373                       | 97.1        | 113118                             | 79            | 61                        | 77.2        | 59355                              |
| Outer London     | 707           | 646                       | 91.4        | 207227                             | 110           | 49                        | 44.5        | 48904                              |
| South East       | 2154          | 2070                      | 96.1        | 487278                             | 333           | 133                       | 39.9        | 124123                             |
| South West       | 1221          | 1030                      | 84.4        | 176475                             | 137           | 47                        | 34.3        | 52037                              |
| <b>England</b>   | <b>11713</b>  | <b>10796</b>              | <b>92.2</b> | <b>2470740</b>                     | <b>1919</b>   | <b>1103</b>               | <b>57.5</b> | <b>1121548</b>                     |

base (unweighted): 98 primary; 84 secondary

Table 2 shows regional and overall response rates. Overall response rates nationally were 65% in primary schools and 56% in secondary schools. Response rates varied regionally from 31% in secondary schools in South West to 80% in primary schools in Yorkshire/Humber. Generally the distribution of responses was similar to the distribution of catering providers in LAs nationally. The distribution of schools by region in the present sample was also similar to data based on the DfES Annual Schools Census<sup>7</sup> (Table 3).

**Table 2. Number of Local Authorities in England for which information on catering provision was obtained, by region**

| Region           | Number of Local Authorities |           | Responses for primary |           | Responses for secondary |             |
|------------------|-----------------------------|-----------|-----------------------|-----------|-------------------------|-------------|
|                  | n                           | %         | n                     | %         | n                       | %           |
|                  |                             |           |                       |           |                         |             |
| North East       | 12                          | 8         | 66.7                  | 8         | 66.7                    | 66.7        |
| North West       | 22                          | 14        | 63.6                  | 13        | 59.1                    | 59.1        |
| Yorkshire/Humber | 15                          | 12        | 80.0                  | 11        | 73.3                    | 73.3        |
| East Midlands    | 9                           | 7         | 77.8                  | 6         | 66.7                    | 66.7        |
| West Midlands    | 14                          | 11        | 78.6                  | 11        | 78.6                    | 78.6        |
| East of England  | 10                          | 6         | 60.0                  | 4         | 40.0                    | 40.0        |
| Inner London     | 14                          | 7         | 50.0                  | 7         | 50.0                    | 50.0        |
| Outer London     | 19                          | 12        | 63.2                  | 8         | 42.1                    | 42.1        |
| South East       | 19                          | 14        | 73.7                  | 11        | 57.9                    | 57.9        |
| South West       | 16                          | 7         | 43.8                  | 5         | 31.3                    | 31.3        |
| <b>England</b>   | <b>150</b>                  | <b>98</b> | <b>65.3</b>           | <b>84</b> | <b>56.0</b>             | <b>56.0</b> |

base (unweighted): 98 primary; 84 secondary

**Table 3. Distribution of primary and secondary schools in England by region: Annual School Census (January 2005) and School Food Trust survey (May 2006)**

| Region           | Primary              |             | Secondary            |             |
|------------------|----------------------|-------------|----------------------|-------------|
|                  | Annual School Census | Sample      | Annual School Census | Sample      |
|                  | %                    | %           | %                    | %           |
| North East       | 5.3                  | 8.2         | 6.2                  | 9.5         |
| North West       | 14.8                 | 14.3        | 14.1                 | 15.5        |
| Yorkshire/Humber | 10.8                 | 12.2        | 9.6                  | 13.1        |
| East Midlands    | 9.8                  | 7.1         | 8.9                  | 7.1         |
| West Midlands    | 10.6                 | 11.2        | 12.2                 | 13.1        |
| East of England  | 11.8                 | 6.1         | 12.6                 | 4.8         |
| Inner London     | 4.0                  | 7.1         | 3.9                  | 8.3         |
| Outer London     | 6.5                  | 12.2        | 8.1                  | 9.5         |
| South East       | 15.3                 | 14.3        | 14.9                 | 13.1        |
| South West       | 11.2                 | 7.1         | 9.6                  | 6.0         |
| <b>England</b>   | <b>100%</b>          | <b>100%</b> | <b>100%</b>          | <b>100%</b> |

base (unweighted): 98 primary; 84 secondary

Table 4 shows FSM eligibility at a regional level (primary and secondary level separately) compared to centrally held DfES data (Annual Schools Census) from January 2005. The SFT values are slightly higher than the census figures. This may have arisen for several reasons. First, the census data are based on responses from schools, whereas the present data were provided by LA catering providers. Second, across each region, the LAs responding within a region were not always wholly representative of all schools in the LA with regard to FSM provision. Indeed, when we compared our values with the census data at the LA level, agreement was very good. This explains in particular the difference in the census and survey findings for secondary schools in the East Midlands and East of England. Third, the census data reflect take up at a particular point in time, whereas the present data reflect annual provision. Fourth, the low response rates in areas with low provision (e.g. South West) may, in the final weighted analysis, produce a smaller contribution to the final weighted average and hence a higher overall value for England as a whole. Finally, there may be differences in the interpretation of the question that affect the overall findings, as there is some uncertainty at both the school and the LA level regarding rates of FSM provision compared with FSM eligibility. That said, the regional pattern of FSM eligibility in the present survey agrees well with the regional pattern from the census data. We are therefore confident in the representativeness of the FSM findings.

Overall, we are satisfied with the response rate (65%). We believe that the findings from the present survey are sufficiently representative of the national characteristics of school catering provision to warrant comparisons in future years. Clearly, the values for areas with the lower response rates will be more variable year on year, and due attention will be paid in future to this issue. To some extent the effect of a low response rate is offset by asking about catering characteristics in 2004-2005 in the present survey, so the practice of asking about the previous year's catering will be continued.

**Table 4. Eligibility for Free Schools Meals in Primary and Secondary Schools by region: Annual Schools Census January 2005 and School Food Trust survey (May 2006)**

| Region           | Primary                    |                | Secondary                  |                |
|------------------|----------------------------|----------------|----------------------------|----------------|
|                  | FSM (Annual School Census) | Present sample | FSM (Annual School Census) | Present sample |
|                  | %                          | %              | %                          | %              |
| North East       | 21.6                       | 24.7           | 17.4                       | 21.2           |
| North West       | 20.2                       | 18.6           | 17.9                       | 17.1           |
| Yorkshire/Humber | 16.9                       | 17.5           | 15.2                       | 15.5           |
| East Midlands    | 12.6                       | 16.7           | 10.5                       | 16.9           |
| West Midlands    | 18.8                       | 19.1           | 15.6                       | 16.2           |
| East of England  | 11.7                       | 13.9           | 9.3                        | 13.0           |
| Inner London     | 38.3                       | 38.9           | 38.7                       | 36.9           |
| Outer London     | 20.1                       | 17.0           | 17.5                       | 18.4           |
| South East       | 10.4                       | 11.2           | 8.4                        | 8.3            |
| South West       | 11.4                       | 10.2           | 8.5                        | 8.9            |
| <b>England</b>   | <b>16.9</b>                | <b>18.2</b>    | <b>14.0</b>                | <b>17.1</b>    |

base (unweighted): 98 primary; 84 secondary

### 3.2 School food catering providers

Table 5 shows the number and percentage of types of catering providers in LAs in primary and secondary schools in England. Amongst the 98 respondents, 98 reported providing food for primary schools and 84 for secondary schools.

The present values accord with estimates from previous surveys. They differ from the distributions reported in the DfES reports on provision and consumption of foods in schools<sup>4,5</sup> because they reflect the distribution from the point of view of LA catering providers, not from the point of view of the schools (see also footnote c). Hence, the proportion of Direct Service Organisations (DSO)/Local Authority Catering Providers (LACP) are higher in the present survey than that reported at the school level. About a third of catering was provided by contractors appointed by the LA.

**Table 5. Number and percentage of types of LA school food providers in primary and secondary schools in England, by region**

| Region             | DSO/LACP  |             | Contractor appointed by LA |             | Contractor appointed by school |            | Other    |            | All       |            |
|--------------------|-----------|-------------|----------------------------|-------------|--------------------------------|------------|----------|------------|-----------|------------|
|                    | n         | %           | n                          | %           | n                              | %          | n        | %          | n         | %          |
| <i>Primary</i>     |           |             |                            |             |                                |            |          |            |           |            |
| North East         | 5         | 62.5        | 2                          | 25.0        | 1                              | 25.0       | 0        | 0.0        | 8         | 100        |
| North West         | 13        | 92.9        | 0                          | 0.0         | 0                              | 0.0        | 1        | 7.1        | 14        | 100        |
| Yorkshire/Humber   | 9         | 75.0        | 3                          | 25.0        | 0                              | 0.0        | 0        | 0.0        | 12        | 100        |
| East Midlands      | 5         | 71.4        | 2                          | 28.6        | 0                              | 0.0        | 0        | 0.0        | 7         | 100        |
| West Midlands      | 9         | 81.8        | 1                          | 9.1         | 1                              | 9.1        | 0        | 0.0        | 11        | 100        |
| East of England    | 4         | 66.7        | 1                          | 16.7        | 1                              | 16.7       | 0        | 0.0        | 6         | 100        |
| Inner London       | 3         | 42.9        | 4                          | 57.1        | 0                              | 0.0        | 0        | 0.0        | 7         | 100        |
| Outer London       | 7         | 58.3        | 5                          | 41.7        | 0                              | 0.0        | 0        | 0.0        | 12        | 100        |
| South East         | 3         | 21.4        | 10                         | 71.4        | 0                              | 0.0        | 1        | 7.1        | 14        | 100        |
| South West         | 2         | 28.6        | 4                          | 57.1        | 0                              | 0.0        | 1        | 14.3       | 7         | 100        |
| <b>All primary</b> | <b>60</b> | <b>61.2</b> | <b>32</b>                  | <b>32.7</b> | <b>3</b>                       | <b>3.1</b> | <b>3</b> | <b>3.1</b> | <b>98</b> | <b>100</b> |

| Region               | DSO/LACP  |             | Contractor appointed by LA |             | Contractor appointed by school |            | Other    | All        | All       |            |
|----------------------|-----------|-------------|----------------------------|-------------|--------------------------------|------------|----------|------------|-----------|------------|
|                      |           |             |                            |             |                                |            |          |            |           |            |
| <i>Secondary</i>     |           |             |                            |             |                                |            |          |            |           |            |
| North East           | 5         | 62.5        | 1                          | 12.5        | 2                              | 25.0       | 0        | 0.0        | 8         | 100        |
| North West           | 9         | 69.2        | 0                          | 0.0         | 3                              | 23.1       | 1        | 7.7        | 13        | 100        |
| Yorkshire/Humber     | 8         | 72.7        | 3                          | 27.3        | 0                              | 0.0        | 0        | 0.0        | 11        | 100        |
| East Midlands        | 5         | 83.3        | 1                          | 16.7        | 0                              | 0.0        | 0        | 0.0        | 6         | 100        |
| West Midlands        | 9         | 81.8        | 0                          | 0.0         | 2                              | 18.2       | 0        | 0.0        | 11        | 100        |
| East of England      | 3         | 75.0        | 0                          | 0.0         | 0                              | 0.0        | 1        | 25.0       | 4         | 100        |
| Inner London         | 3         | 42.9        | 4                          | 57.1        | 0                              | 0.0        | 0        | 0.0        | 7         | 100        |
| Outer London         | 6         | 75.0        | 2                          | 25.0        | 0                              | 0.0        | 0        | 0.0        | 8         | 100        |
| South East           | 3         | 27.3        | 7                          | 63.6        | 0                              | 0.0        | 1        | 9.1        | 11        | 100        |
| South West           | 2         | 40.0        | 1                          | 20.0        | 1                              | 20.0       | 1        | 20.0       | 5         | 100        |
| <b>All secondary</b> | <b>53</b> | <b>63.1</b> | <b>19</b>                  | <b>22.6</b> | <b>8</b>                       | <b>9.5</b> | <b>4</b> | <b>4.8</b> | <b>84</b> | <b>100</b> |

base (unweighted): 98 primary; 84 secondary

### 3.3 Take up of school meals

Table 6 shows percentage take up of school meals in primary and secondary schools for 2005-2006 and 2004-2005 and the average difference in take up between the two financial years. The average take up in primary schools was 42.3% in 2005-2006, varying from between 28% in South West to 59% in Inner London. In secondary schools, the average take up was 42.7%, varying from 36% in South East to 51% in North West. The value in primary schools agrees well with the value obtained in the previous survey of primary schools in England<sup>4</sup>, 42%. The take up in secondary schools was 42.7%. The secondary school meals survey,<sup>5</sup> which collected data in November-December 2003, reported take up of 47%. Again, this corresponds well with the annual value from the present survey of 45% in 2004-2005, as it is known that take up tends to be higher in the Autumn term and lower in the Spring and Summer terms.

**Table 6. Take up of school meals (%) in primary and secondary schools in England, by region, 2005-2006 and 2004-2005**

| Region             | Financial year |             | Change in provision |                                |
|--------------------|----------------|-------------|---------------------|--------------------------------|
|                    | 2005-2006      | 2004-2005   | % of 2004-2005      | Difference (percentage points) |
|                    | %              | %           |                     |                                |
| <i>Primary</i>     |                |             |                     |                                |
| North East         | 55.5           | 56.6        | -1.9                | -1.1                           |
| North West         | 45.8           | 46.2        | -0.9                | -0.4                           |
| Yorkshire/Humber   | 45.5           | 49.0        | -7.1                | -3.5                           |
| East Midlands      | 49.9           | 53.0        | -5.8                | -3.1                           |
| West Midlands      | 44.5           | 49.7        | -10.5               | -5.2                           |
| East of England    | 37.2           | 39.8        | -6.5                | -2.6                           |
| Inner London       | 59.3           | 59.3        | 0.0                 | 0.0                            |
| Outer London       | 42.6           | 47.4        | -10.1               | -4.8                           |
| South East         | 32.0           | 34.0        | -5.9                | -2.0                           |
| South West         | 27.6           | 30.3        | -8.9                | -2.7                           |
| <b>All Primary</b> | <b>42.3</b>    | <b>44.9</b> | <b>-5.8</b>         | <b>-2.6</b>                    |

| Region               | Financial year |             | Change in provision |                                |
|----------------------|----------------|-------------|---------------------|--------------------------------|
|                      | 2005-2006      | 2004-2005   | % of 2004-2005      | Difference (percentage points) |
|                      | %              | %           |                     |                                |
| <i>Secondary</i>     |                |             |                     |                                |
| North East           | 38.3           | 40.8        | -6.1                | -2.5                           |
| North West           | 50.8           | 52.4        | -3.1                | -1.6                           |
| Yorkshire/Humber     | 39.3           | 40.9        | -3.9                | -1.6                           |
| East Midlands        | 42.7           | 45.6        | -6.4                | -2.9                           |
| West Midlands        | 40.7           | 44.9        | -9.4                | -4.2                           |
| East of England      | 48.0           | 44.2        | 8.6                 | 3.8                            |
| Inner London         | 44.3           | 46.3        | -4.3                | -2.0                           |
| Outer London         | 49.4           | 53.1        | -7.0                | -3.7                           |
| South East           | 35.5           | 38.9        | -8.7                | -3.4                           |
| South West           | 37.3           | 48.5        | -23.1               | -11.2                          |
| <b>All secondary</b> | <b>42.7</b>    | <b>44.9</b> | <b>-4.9</b>         | <b>-2.2</b>                    |

base (unweighted):

Primary: 96 (2005-2006); 95 (2004-2005)

Secondary: 78 (2005-2006); 74 (2004-2005)

Analysis: weighted by number of pupils attending schools catered for

Between 2004-2005 and 2005-2006 there was a 6% decline in take up in primary schools and 5% decline in secondary schools, varying regionally in secondary schools from a decrease of 23% to an increase of 9%. The variation in primary schools was smaller. The percentage change calculated in this way is dependent on the previous year's values, and is meaningful in terms of changes in levels of business being reported by catering companies. This is also the basis for the majority of the values appearing in newspapers regarding the changes in levels of take up. Our estimates of change, however, are substantially less than the values reported in the media (typically 10%). We believe that our values are robust and provide a suitable basis for monitoring change in the future.

In relation to the SFT target for increasing take up over the next three years, it is clearer to express change in terms of percentage points (pp) based on the number of pupils nationally taking school meals. Thus, 2.6 pp fewer children in primary schools nationally had school meals in 2005-2006 compared with the previous year, and 2.2 pp fewer in secondary schools.

These values varied considerably between local authorities. Figures 1 and 2 show the variation in take up (percentage points) between 2004-2005 and 2005-2006, by LA in primary and secondary schools, respectively. The Figures make clear that the change between 2004-2005 and 2005-2006 in the majority of schools is between plus or minus 5 percentage points. More schools experienced a decrease than an increase in take up (reflected in the mean values in Table 6), but the reported drop in take up was accounted for by a marked fall in relatively few areas. Some of the apparent differences between 2004-2005 and 2005-2006 may be due in part to changes in the particular schools to which catering services were being provided (e.g. within a LA, schools with especially high or especially low take up may have been included in values for one year but not for the other).

There was no association between take up of free school meals and change in take up between 2004-2005 and 2005-2006 in either primary or secondary schools.

Figure 1. Change in take up (percentage points) in 95 primary schools between 2004-2005 and 2005-2006, by Local Authority in England.

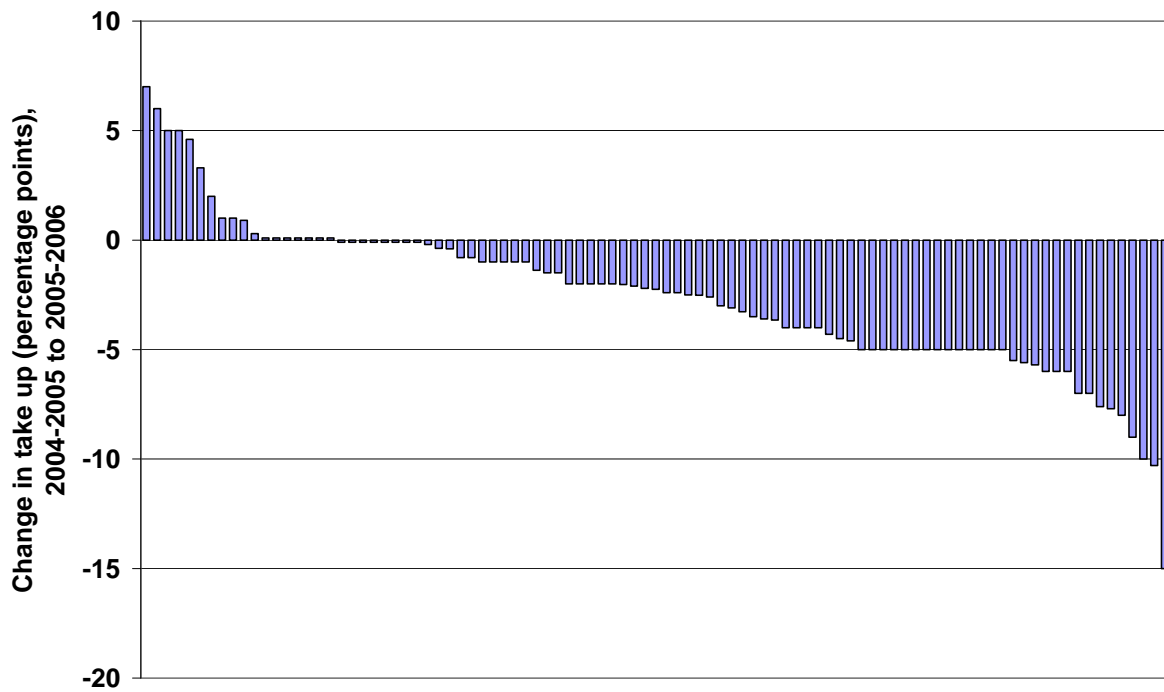
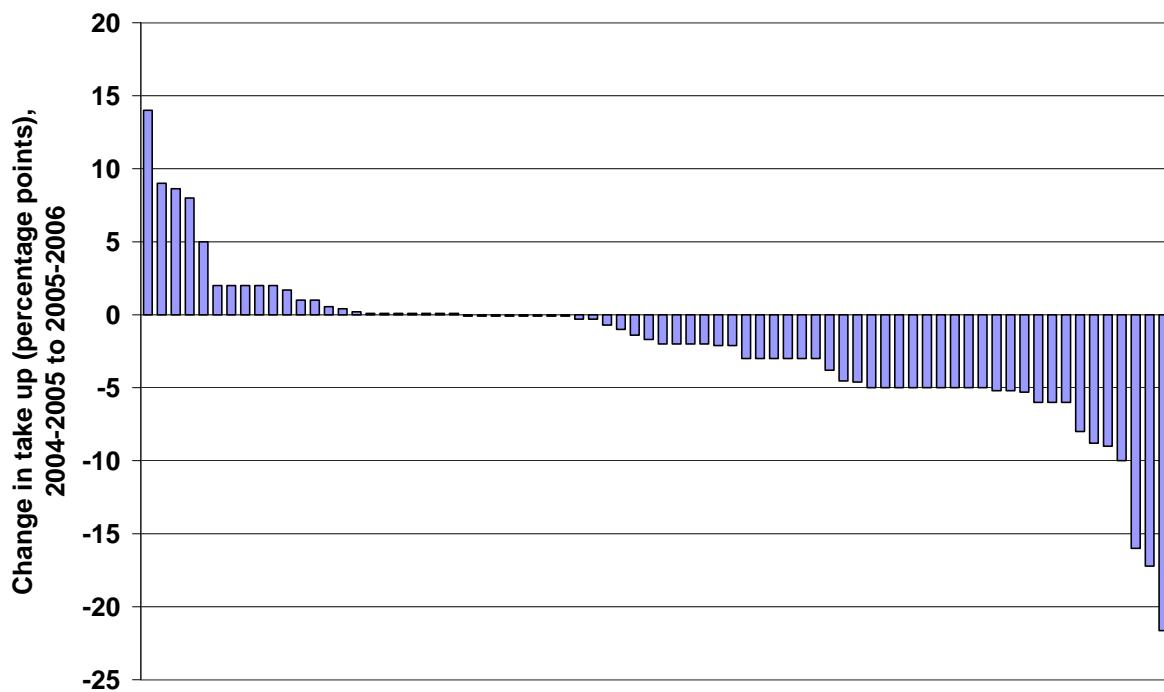


Figure 2. Change in take up (percentage points) in 74 secondary schools between 2004-2005 and 2005-2006, by Local Authority in England.



For purposes of monitoring change, the SFT targets are to increase take up by 4 pp by September 2008 (i.e. to restore take up to 2004-2005 levels and beyond) and by 10 pp by September 2009. We will use the values in the present survey, 42% in primary schools and 43% in secondary schools, as the benchmark for measuring change.

### **3.4 Free School Meal (FSM) provision**

Table 4 shows Free School Meal (FSM) eligibility in the sample at primary and secondary level compared with the Annual Schools Census (January 2005). The present findings agree reasonably well with the January 2005 census values, although for a number of reasons discussed above our values are slightly higher. They support the use of the LA values to estimate changes in FSM (in the context of changes in school food provision by LA caterers) as we monitor changes in take up over the coming years. Because the values reported by the LA catering providers who responded to the present survey were higher than the DfES census data, we will use the same approach used to monitoring change in overall take up, i.e. ask catering providers to provide data for the previous financial year. This will provide a more robust analysis for change, comparing values reported by the survey respondents for the two successive financial years rather than by comparing the SFT survey findings with an external survey collected on a different basis (e.g. collected at school rather than LA level).

### **3.5 Cost of school meals**

Table 7 shows the mean costs of two-course meal, ingredient costs, ingredient costs, labour costs, the price of a two-course meal in 2004-2005, and the increase in price as a percentage of the 2004-2005 costs. Average costs in primary schools were £1.54 in 2005-2006. This represented a 6p (4%) increase on the 2004-2005 average cost, £1.48. In secondary schools, the average in 2005-2006 was £1.62, again 6p (4%) higher than in 2004-2005 (£1.56).

Because secondary school pupils do not all have a two-course meal, the secondary school meal values are based on the costs of a free school meal. In primary schools, the costs represent the actual expenditure on meals provided in schools.

There was relatively little variation regionally in the costs of meals in primary school (ranging from £1.44 in Yorkshire/Humber to £1.63 in South West). Variations in costs between regions were similar in secondary schools to the variations in primary schools, with the exception of a substantially higher value of £1.81 in Outer London.

Ingredient costs in primary and secondary schools averaged 52p and 67p respectively, representing about one third of the meal price in primary schools, but 41% of the costs in secondary schools. There was relatively little variation in average costs between regions. In contrast, as would be expected, labour costs were higher in primary schools (81p, or 53% of meal costs) compared with secondary schools (72p, or 46%), and there was substantially greater variation. The higher average labour costs in primary schools reflect the catering practices needed to provide a cooked meal for every pupil having a school lunch (with the exception of primary schools which provide packed lunch services only). This contrasts to the service in secondary schools which includes a much higher proportion of foods that are pre-packed (e.g. sandwiches) for which labour costs are likely to be lower.

**Table 7. Mean cost of a two-course meal, ingredient cost, and labour cost in 2005-2006, and cost of a two-course meal in 2004-2005, in primary and secondary schools in England, by region**

| Region               | Price per meal<br>2005-2006 | Ingredient cost | Labour cost | Price per meal<br>2004-2005 | % increase in<br>price 2004-<br>2005 to 2005-<br>2006 |
|----------------------|-----------------------------|-----------------|-------------|-----------------------------|---|
|                      | £                           | p               | p           | £                           | %   |
| <i>Primary</i>       |                             |                 |             |                             |   |
| North East           | 1.49                        | 50.6            | 89.1        | 1.44                        | 3.5   |
| North West           | 1.57                        | 53.8            | 79.9        | 1.52                        | 3.3   |
| Yorkshire/Humber     | 1.44                        | 48.4            | 77.6        | 1.38                        | 4.3   |
| East Midlands        | 1.51                        | 54.9            | 83.0        | 1.45                        | 4.1   |
| West Midlands        | 1.56                        | 49.2            | 87.5        | 1.50                        | 4.0   |
| East of England      | 1.55                        | 56.4            | 70.8        | 1.44                        | 7.6   |
| Inner London         | 1.62                        | 48.8            | 91.2        | 1.59                        | 1.9   |
| Outer London         | 1.60                        | 56.6            | 73.0        | 1.50                        | 6.7   |
| South East           | 1.54                        | 50.5            | 84.7        | 1.47                        | 4.8   |
| South West           | 1.63                        | 54.7            | 52.2        | 1.54                        | 5.8   |
| <b>All primary</b>   | <b>1.54</b>                 | <b>52.0</b>     | <b>81.3</b> | <b>1.48</b>                 | <b>4.1</b>  |
| <i>Secondary</i>     |                             |                 |             |                             |   |
| North East           | 1.66                        | 72.6            | 83.9        | 1.60                        | 3.7   |
| North West           | 1.61                        | 65.8            | 70.8        | 1.56                        | 3.2   |
| Yorkshire/Humber     | 1.56                        | 71.3            | 60.5        | 1.48                        | 5.4   |
| East Midlands        | 1.61                        | 63.5            | 60.3        | 1.57                        | 2.5   |
| West Midlands        | 1.66                        | 66.7            | 78.7        | 1.59                        | 4.4   |
| East of England      | 1.59                        | 64.1            | 82.3        | 1.61                        | -1.2  |
| Inner London         | 1.61                        | 57.9            | 73.7        | 1.55                        | 3.9   |
| Outer London         | 1.81                        | 85.4            | 86.7        | 1.77                        | 2.3   |
| South East           | 1.57                        | 70.9            | 63.1        | 1.50                        | 4.7   |
| South West           | 1.43                        | 64.9            | 60.9        | 1.43                        | 0.0   |
| <b>All secondary</b> | <b>1.62</b>                 | <b>67.2</b>     | <b>72.1</b> | <b>1.56</b>                 | <b>3.8</b>  |

base (unweighted) Primary: 79, 70, 51, 76; secondary: 69,59,47,64 for Price per meal, ingredient cost, labour cost and price per meal 2004-2005, respectively

Analysis: weighted by number of meals provided by caterers

### 3.6 Facilities for food preparation

It was important to know what proportion of schools have food preparation facilities that facilitate or limit the types of foods and services that can be offered. Table 8 shows the findings by region for primary and secondary schools separately. LA catering providers were asked to describe preparation facilities in the schools for which they provided catering. Over two-thirds of primary and almost all secondary schools reported having kitchens in which all food could be prepared from scratch. One fifth of primary schools, however, had no facilities for either preparation or regeneration (representing about 3500 primary schools nationally who, by implication, have prepared food delivered). 5% reported that they serve cold food only (representing about 900 schools of all primary schools in England), concentrated almost entirely in South East and South West. These are not necessarily schools without kitchen facilities<sup>d</sup> but which simply choose to serve cold food only. There is marked regional variation. Lack of food preparation facilities affects relatively few secondary schools; again, the problems are highly focused on particular LAs.

<sup>d</sup> the data do not allow the necessary analysis at the school level

**Table 8. Facilities for food preparation in primary and secondary schools in England (percent of schools), by region**

| Region               | All food can be prepared from scratch | Some food can be prepared from scratch | Regeneration facilities | No facilities for preparation or regeneration | Cold food only* |
|----------------------|---------------------------------------|--|-------------------------|---|-----------------|
|                      | %                                     | %                                      | %                       | %   | %               |
| <i>Primary</i>       |                                       |  |                         |   |                 |
| North East           | 66.4                                  | 0.4                                    | 23.5                    | 9.6   | 0.0             |
| North West           | 80.6                                  | 10.4                                   | 3.2                     | 5.9   | 0.1             |
| Yorkshire/Humber     | 74.3                                  | 5.7                                    | 2.1                     | 17.8  | 0.5             |
| East Midlands        | 73.3                                  | 0.9                                    | 1.9                     | 23.9  | 0.0             |
| West Midlands        | 73.0                                  | 1.6                                    | 9.3                     | 16.0  | 0.0             |
| East of England      | 92.9                                  | 0.0                                    | 6.5                     | 0.5   | 0.0             |
| Inner London         | 80.8                                  | 0.6                                    | 10.8                    | 7.8   | 0.2             |
| Outer London         | 76.7                                  | 1.5                                    | 0.5                     | 21.3  | 2.6             |
| South East           | 60.4                                  | 1.1                                    | 4.8                     | 33.8  | 10.8            |
| South West           | 48.2                                  | 7.5                                    | 1.0                     | 43.3  | 23.0            |
| <b>All primary</b>   | <b>72.0</b>                           | <b>3.0</b>                             | <b>5.1</b>              | <b>19.8</b>                                   | <b>5.0</b>      |
| <i>Secondary</i>     |                                       |  |                         |   |                 |
| North East           | 100.0                                 | 0.0                                    | 0.0                     | 0.0   | 0.0             |
| North West           | 97.9                                  | 2.1                                    | 0.0                     | 0.0   | 0.3             |
| Yorkshire/Humber     | 99.2                                  | 0.8                                    | 0.0                     | 0.0   | 0.0             |
| East Midlands        | 100.0                                 | 0.0                                    | 0.0                     | 0.0   | 0.0             |
| West Midlands        | 92.1                                  | 0.8                                    | 6.9                     | 0.2   | 0.0             |
| East of England      | 100.0                                 | 0.0                                    | 0.0                     | 0.0   | 0.0             |
| Inner London         | 97.8                                  | 0.0                                    | 0.0                     | 2.2   | 1.3             |
| Outer London         | 100.0                                 | 0.0                                    | 0.0                     | 0.0   | 0.0             |
| South East           | 100.0                                 | 0.0                                    | 0.0                     | 0.0   | 0.0             |
| South West           | 100.0                                 | 0.0                                    | 0.0                     | 0.0   | 0.0             |
| <b>All secondary</b> | <b>96.5</b>                           | <b>0.7</b>                             | <b>2.7</b>              | <b>0.2</b>                                    | <b>0.1</b>      |

\* Subset of all schools, not necessarily those with no facilities for preparation or regeneration base (unweighted): primary: 88; secondary: 74 analysis: weighted by number of schools catered for

### 3.7 Change in demand

Catering providers were asked to say whether they felt that demand had fallen, remained constant, or increased in 2005-2006 compared with the previous financial year (2004-2005). In keeping with the findings regarding changes in uptake by LA, just over two thirds of caterers for primary schools and just over half of caterers for secondary schools reported a fall in demand (Table 9). The remaining catering providers reported either a constant demand or an increase. This contrasts with the media reports of almost universal decline in the take up of school meals.

Just under half of the caterers for primary schools and about one-quarter of the caterers for secondary schools reported having undertaken a formal investigation of the reasons for changes in demand. Although a question was not asked specifically, typically these include surveys of pupils, discussions with parents and governors, and feedback from questionnaires.

**Table 9. Reported change in demand for school meals from 2004-2005 to 2005-2006, primary and secondary schools in England**

| Change in demand, 2004-2005 compared with 2005-2006 | Primary schools | Secondary schools |
|---|-----------------|-------------------|
|   | %               | %                 |
| Fallen  | 71.9            | 55.7              |
| Remained Constant                                   | 19.8            | 29.3              |
| Increased   | 8.3             | 15.0              |

base (unweighted): primary: 87; secondary: 74

Analysis: weighted by numbers of meals served by caterers

Catering providers were asked to think about factors thought to be responsible for the fall or sustained or rising demand compared with last year. The findings are shown in Table 10 and Table 11. The main reason given for the perceived fall in demand in both primary and secondary schools was media coverage of school dinners. The second most common response was parents' perception of poor quality provision. The third most common reason in primary schools was the provision of more healthy options resulting in more pupils bringing in packed lunches. In secondary schools, the same reason was felt to have resulted in more pupils buying meals elsewhere. Numerous other reasons were also given, ranging from an increase in prices (although this did not seem excessive nationally) to an actual decline in the number of pupils either on roll or eligible for free school meals. About one-fifth felt that the decline had occurred as a result of formal consultation with local authorities, schools, head teachers, or governors.

Of those who reported either a constant or rising demand, the main reason given (by 43% in primary and 35% in secondary schools) was the influence of a school food policy. A second important reason was improved meal quality offset by prices being held constant, and a third was the provision of more healthy options. No increase in prices was also seen as a positive contributor. Some secondary schools also cited improved facilities for provision (for example, a new dining room or kitchen).

**Table 10. Percentage of caterers identifying particular reasons believed to have contributed to a fall in demand for school meals in 2005-2006, primary and secondary schools in England**

| Reason  | Primary  |                    |                    | Secondary          |  |                    |                    |                    |
|---|--|--------------------|--------------------|--------------------|--|--------------------|--------------------|--------------------|
|   | identifying reason as contributing to fall in demand | ranking reason 1st | ranking reason 2nd | ranking reason 3rd | identifying reason as contributing to fall in demand | ranking reason 1st | ranking reason 2nd | ranking reason 3rd |
| Increase in prices charged due to inflation (wages etc.)  | 34.4   | 4.7                | 13.1               | 9.8                | 28.4   | 7.0                | 3.2                | 11.2               |
| Increase in prices charged due to use of better quality ingredients   | 14.3   | 1.8                | 1.9                | 0.0                | 17.0   | 1.7                | 0.5                | 0.0                |
| Increase in prices charged due to increase in quantity of labour required for meal provision                | 3.9  | 0.0                | 0.0                | 0.8                | 2.8  | 0.0                | 0.0                | 2.5                |
| Increase in prices charged due to increased training provision  | 3.3  | 5.2                | 0.0                | 0.0                | 2.0  | 1.2                | 0.0                | 0.0                |
| Provision of more 'healthy' options in the last year resulting in pupils buying meals elsewhere             | 28.6   | 2.1                | 2.5                | 0.0                | 52.1   | 10.9               | 18.0               | 13.5               |
| Provision of more 'healthy' options in the last year resulting in pupils bringing in packed lunches         | 55.0   | 5.4                | 13.8               | 30.0               | 38.0   | 1.8                | 9.3                | 4.0                |
| Pupil numbers have stayed about the same, but pupils are purchasing meals less frequently                   | 17.8   | 0.0                | 0.0                | 2.2                | 16.5   | 0.0                | 0.0                | 0.0                |
| Number of pupils buying meals has gone down   | 36.1   | 3.8                | 2.1                | 2.5                | 33.3   | 9.2                | 4.5                | 3.4                |
| Disruption in facilities for provision (e.g. kitchen refurbishment)   | 2.0  | 0.0                | 0.0                | 0.0                | 5.1  | 0.0                | 0.0                | 3.9                |
| Parents providing packed lunches  | 44.0   | 1.8                | 6.4                | 6.6                | 11.4   | 0.0                | 1.8                | 1.9                |
| Meal quality has fallen   | 1.1  | 0.0                | 0.0                | 0.0                | 0.5  | 0.0                | 0.0                | 0.0                |
| Parents' perception of poor quality provision   | 56.9   | 3.8                | 45.8               | 3.5                | 37.6   | 1.5                | 22.7               | 14.5               |
| Pupils' perception of poor quality provision  | 11.1   | 0.0                | 0.0                | 4.2                | 27.4   | 1.6                | 14.7               | 2.1                |
| A fall in pupil numbers on roll who would pay for meals   | 37.6   | 1.2                | 3.0                | 13.0               | 34.6   | 0.0                | 5.7                | 16.5               |
| A fall in pupil numbers eligible for FSM  | 37.6   | 0.8                | 2.3                | 4.4                | 36.8   | 2.1                | 0.7                | 5.2                |
| Media coverage of school dinners  | 72.5   | 69.4               | 4.5                | 9.1                | 63.2   | 50.9               | 17.1               | 8.7                |
| Increase in locally available options for pupils to buy food (e.g. food vans, local shops)                  | 2.5  | 0.0                | 0.0                | 0.0                | 11.5   | 0.0                | 0.8                | 2.8                |
| Organisation of meals acts as a deterrent (e.g. longer queues, change in timetable)                         | 10.4   | 0.0                | 1.6                | 6.6                | 33.4   | 4.9                | 1.0                | 7.8                |
| Changes in food provision as a result of formal consultation with schools, heads and staff, governors, LA's | 21.5   | 0.0                | 3.0                | 6.2                | 23.3   | 7.4                | 0.0                | 1.9                |
| Changes in food provision as a result of formal consultation with parents                                   | 10.4   | 0.0                | 0.0                | 1.1                | 9.3  | 0.0                | 0.0                | 0.0                |
| Changes in food provision as a result of formal consultation with pupils                                    | 5.3  | 0.0                | 0.0                | 0.0                | 9.2  | 0.0                | 0.0                | 0.0                |
| Other   | 3.9  | 0.0                | 0.0                | 0.0                | 1.7  | 0.0                | 0.0                | 0.0                |
|   |  | 100%               | 100%               | 100%               |  | 100%               | 100%               | 100%               |

base (unweighted): 98 primary; 84 secondary

**Table 11. Percentage of caterers identifying particular reasons believed to have contributed to a steady or increased demand for school meals in 2005-2006, primary and secondary schools in England**

| Reason   | Primary  |                    |                    | Secondary          |  |                    |                    |                    |
|--|--|--------------------|--------------------|--------------------|--|--------------------|--------------------|--------------------|
|  | identifying reason as contributing to constant/rising demand | ranking reason 1st | ranking reason 2nd | ranking reason 3rd | identifying reason as contributing to constant/rising demand | ranking reason 1st | ranking reason 2nd | ranking reason 3rd |
| No change in prices  | 26.9   | 33.9               | 4.7                | 4.8                | 15.2   | 22.3               | 1.9                | 6.3                |
| Improved meal quality offset by prices being held constant   | 41.5   | 12.7               | 51.3               | 5.7                | 26.3   | 23.3               | 24.6               | 4.5                |
| Provision of more healthy options  | 37.7   | 14.7               | 2.5                | 28.3               | 20.6   | 4.1                | 13.6               | 33.4               |
| Provision of healthy options only  | 12.5   | 0.0                | 5.6                | 2.8                | 3.0  | 0.0                | 1.5                | 0.0                |
| School policy (whole school food approach (e.g. locking school gates, teaching about healthy eating) | 43.2   | 24.8               | 5.0                | 18.6               | 34.7   | 31.7               | 9.2                | 17.1               |
| Removal of vending machines  | 4.3  | 0.0                | 1.6                | 2.4                | 5.7  | 0.0                | 6.0                | 4.7                |
| Better trained staff   | 16.6   | 3.0                | 5.3                | 7.8                | 4.6  | 2.4                | 1.9                | 0.0                |
| More staff   | 3.2  | 0.0                | 0.0                | 0.0                | 3.8  | 0.0                | 0.0                | 0.0                |
| Improvement in facilities for provision (e.g. new kitchen/dining room)                               | 19.2   | 6.9                | 16.9               | 9.5                | 26.6   | 9.2                | 26.7               | 18.0               |
| Increased eligibility for or take up of FSM  | 5.4  | 2.6                | 1.2                | 1.7                | 4.3  | 3.3                | 0.0                | 1.9                |
| Increase in pupil numbers on roll who pay for meals  | 11.4   | 0.0                | 2.5                | 11.9               | 9.0  | 0.0                | 3.8                | 9.2                |
| Reorganisation of arrangements for meals (e.g. shorter queues, change in timetable)                  | 12.0   | 0.0                | 2.2                | 5.0                | 11.4   | 0.0                | 10.4               | 4.0                |
| Media coverage of school meals   | 12.7   | 0.7                | 1.2                | 0.0                | 5.6  | 1.4                | 0.0                | 0.0                |
| Other  | 5.6  | 0.7                | 0.0                | 1.7                | 6.3  | 2.3                | 0.4                | 0.8                |
|  |  | 100%               | 100%               | 100%               |  | 100%               | 100%               | 100%               |

base (unweighted): 98 primary; 84 secondary

### 3.8 Ability to meet new standards

The SFT commissioned Sustain to carry out a survey of LA school food providers in England to assess factors that were likely to influence their ability to meet the new DfES standards for school food. A report and the data set were received by the SFT in April 2006.

131 of the 150 LA catering providers approached responded to the question asking if they thought they would meet the proposed food-based standards by September 2006 (19 did not respond). 128 (98% of 131, or 85% of 150) reported that they would be able to meet the new food based standards by September 2006; only 3 (2%) said that they would not. These responses were made on the basis that the new food-based standards to be introduced would be those recommended by the SMRP in 'Turning the Tables'. Because the standards announced by DfES in May 2006 varied somewhat from the SMRP recommendations, the responses to the Sustain survey may not wholly reflect the caterers' views on their ability to meet the new standards. Given the similarity in the main between the SMRP recommendations and the DfES standards, however, the present findings are likely to be a useful guide to caterers' views and concerns.

120 of 125 responding LA catering providers reported that they would meet nutrient-based standards by September 2009 (25 did not respond). This represents 96% of those who responded, or 80% of all LA catering providers. Only 5 (3%) said they would not. The nutrient-based standards as recommended by the SMRP were adopted by DfES with no revisions.

The responses, on the whole, appear to be very positive. However, LA catering providers also reported many significant challenges to meeting the standards (Table 12), suggesting that the proportion of LAs that will meet the new standards on time may not be as high as predicted.

**Table 12. Challenges identified by LA catering providers in meeting the DfES standards for school food**

| Challenge  | Number and percent of LA catering providers identifying challenge |    |
|--|---|----|
|  | n   | %  |
| Additional costs (incl. food, training, equipment, labour, kitchens, IT, specialist staff, marketing)                      | 51  | 34 |
| Maintaining take up (despite probable price increases and changed menus)   | 47  | 31 |
| Consulting and engaging stakeholders, especially headteachers and parents  | 35  | 23 |
| Problems specific to secondary schools (incl. changing eating habits, alternative food sources, and length of lunch break) | 29  | 19 |
| Cooking  | 29  | 19 |
| Providing menus that will meet the standards and that children will like   | 28  | 19 |
| Providing catering   | 16  | 11 |
| Primary schools with no provision, no hot meal provision and /or transported meals   | 13  | 9  |
| Supporting and informing schools not in central contract   | 12  | 8  |
| Undertaking nutritional analysis   | 12  | 8  |
| Meeting diverse needs  | 11  | 7  |

base (unweighted): 133 LA

The Sustain data support the findings in the present survey that approximately a third of LA catering providers identified an increase in meal price, change in provision resulting in pupils buying food elsewhere (particularly in secondary schools) or bringing in packed lunches (particularly in primary schools), and organisation of meals acting as a deterrent (in secondary schools) as contributing to a fall in demand for meals. Over 40% identified improved meal quality offset by process being held constant, and school food policy as contributing to constant or rising demand for school meals.

## **4 Discussion**

The present findings, based on a 65% response rate, are likely to be representative of LA school food provision in England. Our expectation is that the response rates will be higher for subsequent surveys for several reasons. First, it will be possible to ask LA catering providers further in advance for the information, and to allow a longer period for follow-up. Secondly, the sequence of surveys immediately preceding the present survey (from DfES, Soil Association, and indeed the SFT) will not be taking place, and the element of survey fatigue that may have influenced the present response rates adversely is unlikely to play a role.

The good agreement between the findings in the present report and previous estimates from other sources provide assurance that the format of the present survey and the respondent base is appropriate for monitoring changes in school food provision over the next few years. The strength of the present approach is consistency in terms of the measuring instrument, the source of the data, the time frame to which the data relate, and therefore interpretation regarding changes in provision.

The differences in the percentage of types of LA school food providers between the present survey and the values reported in the surveys of primary and secondary schools in England derive from the different sources of data. In the present survey, data were provided by the LA catering providers, and therefore do not include responses from those schools who operate outside of this system. In the latter, the perspective is the school, and the non-LA catering provision is documented.

The results show a small but significant decrease in the percentage of pupils in England taking school meals, 2.6 percentage points in primary schools and 2.2 percentage points in secondary schools. This decline may be part of a continuing trend or may be a pronounced dip in relation to previous levels. The extent of the decrease is much less than has recently been reported in the media (a decrease of up to 12%). This is in part because the media reports have described the change in the level of service as a percentage of the previous year's level. Our values reported on the same basis were -5.8% in primary schools and -4.9% in secondary schools. The media reports have also highlighted values based on local changes, not national statistics.

We believe the present findings to be a more truthful reflection of trends nationally. Figures 1 and 2 show that the majority of change in provision is within plus or minus 5 percentage points. Only a minority of LAs showed substantial decreases in the level of take up, and this may have been due to local circumstances rather than suggesting that there is a disaffection with school meals nationally. Furthermore, there were numerous schools (more secondary than primary) in which, by contrast, there was a substantial *increase* in take up.

The costs of providing meals in primary and secondary schools showed a small increase (about 4%) over the previous year. This will be monitored closely over the coming years. Changes in the rate of take up will reflect, in part, a balance between changes in price (a downward influence) and perceived changes in quality (an upward influence). Rising prices may be consequent upon the use of healthier ingredients and more preparation time being needed by catering staff to produce healthier food from scratch.

It is of concern that 20% of primary schools have no facilities for preparation of food *or* regeneration. Equally, it is of concern that 5% of schools choose to serve cold food only. It will be important to monitor closely the factors that support improvements to facilities for food provision, how they impact on the foods that schools choose to serve, and the extent to which these affect primary schools especially.

Finally, based on the results from the recently commissioned SFT survey carried out by Sustain, it is encouraging that LA school catering providers expressed confidence that they would be able to satisfy the new DfES food and nutrient standards within the time frame. Their responses were based on the then published recommendations from the SMRP. The findings suggests that there is a generally positive attitude regarding the acceptance of the need for change and a willingness to put changes in place. The effectiveness of the changes at the LA level will need to be assessed against changes in the actual consumption of school food by pupils. Data on consumption will be collected in separate surveys conducted at the school level.

## **5 References**

---

<sup>1</sup> In Autumn 2005, SFT conducted (via Healthy Schools co-ordinators) an online survey of Local Authorities to determine the numbers of schools within each authority with different types of catering provision. A total of 135 authorities responded.

<sup>2</sup> In November 2005, DFES conducted an online survey of Local Authorities to inform the implementation of the Improving School Food Programme. All authorities (150) were invited to participate. A total of 103 (69%) completed the survey.

<sup>3</sup> School Food Trust (April 2006). Transforming School Food: a review of local authority activity and good practice.

<sup>4</sup> Nelson M et al (2006). School meals in primary schools in England. Research Report 753. DfES: London

<sup>5</sup> Nelson M et al (2004). School meals in secondary schools in England. Research Report 557. DfES: London

<sup>6</sup> Statistical Package for the Social Sciences. Version 11.0.1. Chicago, Ill. SPSS Inc. 1989-2001.

<sup>7</sup> DfES (2005). Schools and pupils in England: January 2005 (Final)