

City Intelligence analysis of Arbor meals data, 2023/24 and 2024/25

May 2026

1. Introduction

1.1 Universal Free School Meals

The Mayor's Universal Free School Meals (UFSM) programme funds free school meals (FSM) for all primary pupils in Years 3 to 6 (Key Stage 2), in state-funded schools in London, who are not eligible for FSM through the national programme. Pupils in Reception and Years 1 to 2 (Key Stage 1) already receive universal free school meals through the national FSM scheme.

1.2 Collection of take-up data by the GLA

The GLA does not routinely collect data on the take-up of meals offered through the London UFSM scheme. This is due to the complex and variable nature of measuring meal take-up across schools; and the burden that a monitoring requirement could put on schools. Instead, take-up is understood using alternative sources – including data from Arbor, a management information system (MIS) provider.

In 2023, the GLA approached all MIS providers operating in the London school market. Only Arbor could feasibly share its data, due to its own data-sharing agreements with school customers. For this reason, Arbor remains the sole source of administrative data used by the GLA to understand uptake, despite its limitations.

1.3 Arbor data

At the time of writing this report, Arbor provides its MIS to over 12,500 schools nationally, including nearly 10,000 primary schools. Arbor offered to provide data in kind, from the schools it supports in London. This gives a picture of what UFSM 'uptake' levels are across London; and how it may differ between areas, and groups of pupils.

Arbor shares its anonymised data with the GLA via a bespoke dashboard. This is aggregated, anonymised data only; no data on individual schools or pupils was shared.

An advantage of Arbor is that families can order their child's meal up to the morning of the school day. Schools using Arbor's 'school dinner module' have an accurate record of the exact meal the child chooses. Not only does this give families a choice; it also reduces food waste, since the intention is that the child is eating a meal they like.

In the 2024/25 academic year, 384 schools in Arbor's sample (of schools with pupils in Years 3 to 6) used the meals module fully, so were included in this analysis. This corresponds to 21% of all state-funded

schools in London with pupils in Years 3 to 6 in 2024/25 (1,844).¹ These schools included 49,656 pupils (13% of the total population of 382,278).²

2. Methodology

Most of the analysis performed was on London-wide data – i.e. all schools in Arbor’s data in London, across Years 3 to 6. The key metric analysed was ‘uptake’; this is defined as **the percentage of meals taken by a given pupil group (Mayor-funded or FSM-eligible)**. Pupils eligible for FSM are funded by the national government, and not through the Mayor’s scheme.

The analysis covers two full academic years:

- 2023/24 academic year, running from 4 September 2023 to 24 July 2024
- 2024/25 academic year, running from 2 September 2024 to 22 July 2025.

These term dates are based on the most common term dates used by local authorities in London. Local authorities each set their own term dates, and they may differ from the average dates used in this report. Further data and analysis for the 2025/26 academic year will be published in autumn 2026.

Averages are determined by the number of meals that each school offers to Mayor-funded pupils, over each academic year. Analysis is also presented by pupil characteristics (gender, special educational needs and disabilities (SEND) status, ethnicity, religion, and year group), where sample sizes allow. Ethnicity and religion data were aggregated into broader groups from more granular categories provided by Arbor.

3. Limitations

3.1 Data coverage

The analysis is based solely on Arbor’s data, covering around 21% (384 schools) of schools delivering UFSM in London. This means it only provides a partial picture. However, the Arbor sample has grown over time (261 schools in 2023/24 to 384 in 2024/25). As a result, the composition of the sample is changing as new schools are added.³ As such, some observed trends over time may partly reflect changes in the sample, rather than underlying behaviour.

For the 2023/24 and 2024/25 academic years, there was no Arbor data for the City of London or Hillingdon. For the 2023/24 academic year there was also no data for Ealing; but it is included in the 2024/25 sample.

Importantly, it is not known whether pupils in schools using Arbor’s MIS are systematically different from pupils in schools using other MIS. This makes it hard to say whether Arbor’s data is representative of all schools delivering UFSM in London. Therefore, the GLA interprets these results as indicative; but benefits from an understanding, taken from the data, of high-level trends across pupil characteristics.

3.2 Sub-group sample sizes

The number of schools and pupils included in the Arbor sample varies substantially by borough, so analysis is presented at the total London level only. In addition, some pupil sub-groups have small sample sizes –

¹ [Schools, pupils and their characteristics](#). Academic year 2024/25. Department for Education.

² [Schools, pupils and their characteristics](#). Academic year 2024/25. Department for Education.

³ Schools may have stopped using the Arbor MIS meals module; but overall, there has been growth in the number of schools.

particularly Jewish pupils; those with unclassified ethnicity; and those who refused to state their religion. Trends for these groups should be interpreted with caution. See Annex (Section 5) for sample sizes.

3.3 Data aggregation

Arbor provides anonymised data, aggregated to borough level. This limits the ability to test for statistical significance. Results are presented as London-wide averages; but the varying borough coverage means that these may not reflect individual boroughs, which could have higher or lower uptake.

4. Results

4.1 Proportion of meals taken by Mayor-funded pupils (not eligible for FSM)

In the Arbor sample, uptake among Mayor-funded pupils was 92.9% in 2024/25, up from 89.1% in 2023/24 (Figure 1).

When excluding the five boroughs offering UFSM before 2023/24 (Islington, Newham, Southwark, Tower Hamlets and Westminster), the uptake was slightly lower at 91.1% in 2024/25, increasing from 87.7% in 2023/24.

These uptake estimates are based on the Arbor dataset, which may not be fully representative of all schools delivering UFSM in London, as mentioned earlier.

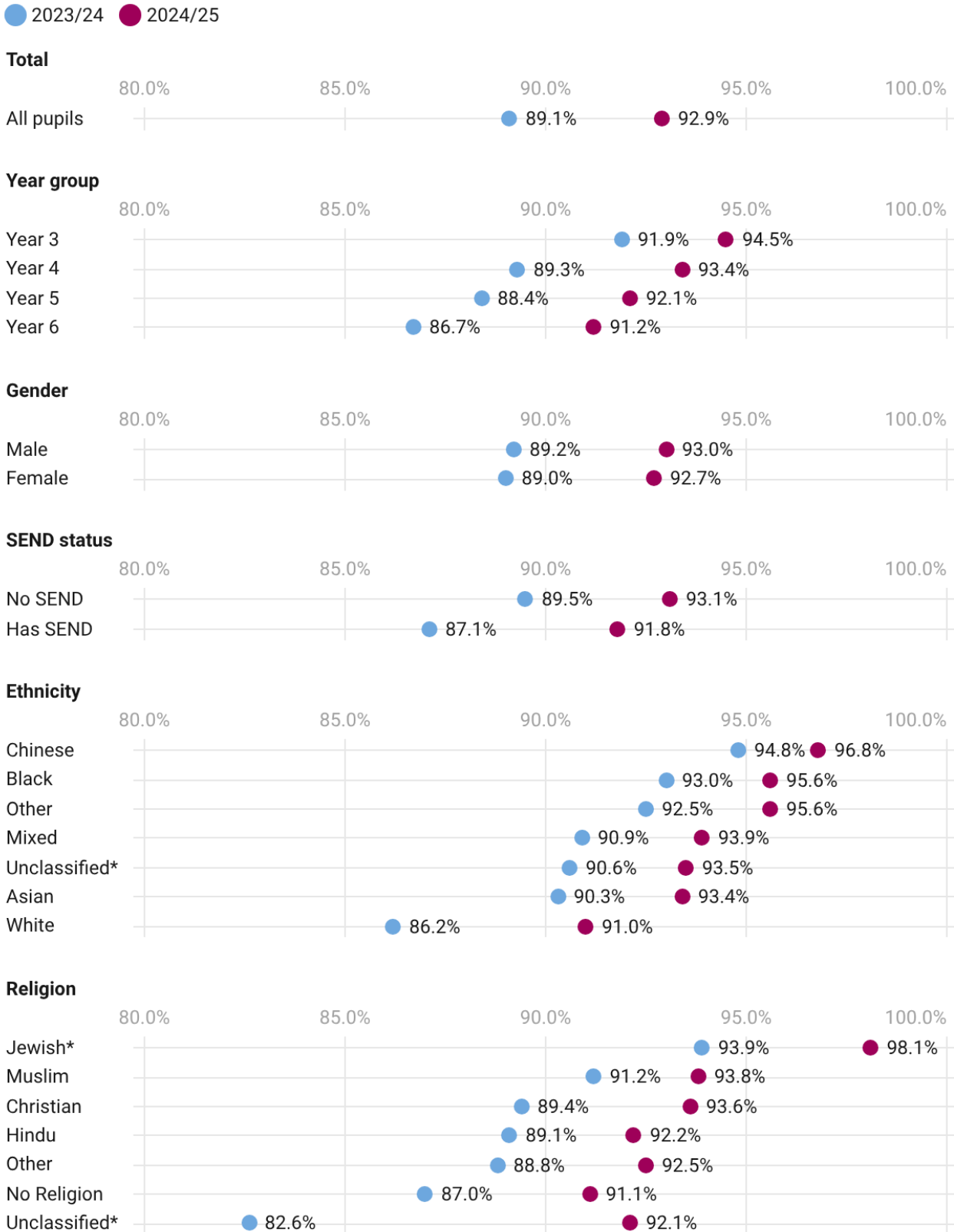
4.2 Proportion of meals taken by Mayor-funded pupils (not eligible for FSM), with different characteristics

Analysis of uptake for different groups consistently shows that, in 2024/25:

- uptake decreases in higher year groups (comparing Year 6 to Year 3)
- uptake was similar for male and female pupils
- uptake was lower among pupils with SEND, compared to pupils without SEND
- uptake was higher among Black, Asian and Minority Ethnic pupils, compared with White pupils
- uptake was lowest among those with no religion, compared with pupils who declared having a religion.

Between 2023/24 and 2024/25, uptake increased across all groups (year groups, gender, SEND status, ethnicity and religion).

Figure 1. Proportion of meals taken by Mayor-funded pupils (not eligible for FSM) overall and by different characteristics, 2023/24 and 2024/25 academic years



*The Arbor sample size for Jewish pupils (2023/24: 175 pupils, 2024/25: 672 pupils), pupils with unclassified ethnicity (2023/24: 476, 2024/25: 688) and those unclassified religion (2023/24: 430, 2024/25: 761) were low (particularly in 2023/24). Trends for these groups should be interpreted with caution.

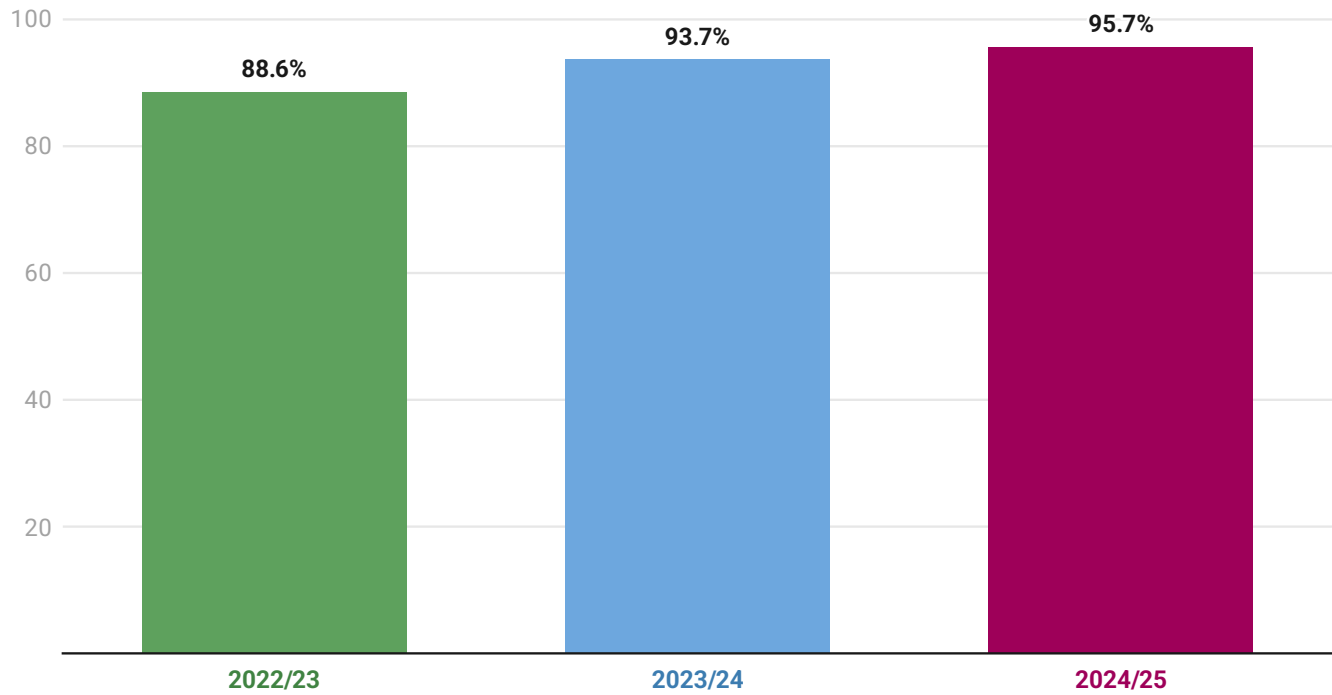
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4.3 Proportion of meals taken by national government-funded pupils (FSM)

Arbor’s data also covered the period when the UFSM programme was not in place; so there is data from the 2022/23 academic year on meal uptake. Using this data, City Intelligence could see any changes in uptake among national government-funded pupils (i.e., those eligible for FSM).

Among FSM-eligible pupils, meal uptake increased from 88.6% in 2022/23 (pre-UFSM) to 93.7% in 2023/24, and again to 95.7% in 2024/25.

Figure 2. Proportion of meals taken by national government-funded (i.e., FSM-eligible) pupils in London, 2023/24 and 2024/25 academic years



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5. Annex – sample sizes

Table 1. Schools; Mayor-funded pupils (i.e., those not eligible for FSM); and national government-funded (i.e., FSM-eligible) pupils, 2022/23 to 2024/25

	2022/23	2023/24	2024/25
Schools	177	261	384
UFSM pupils	N/A	35,234	49,656
FSM pupils	9,842	16,040	23,665

Table 2. Mayor-funded pupils (i.e., those not eligible for FSM) by characteristic in the Arbor sample, 2023/24 and 2024/25

Group	Subgroup	2023/24	2024/25
Year group	Year 3	9,115	13,102
	Year 4	8,969	12,589
	Year 5	8,691	12,305
	Year 6	8,459	11,660
Gender	Male	17,858	25,339
	Female	17,376	24,317
SEND status	Has SEND	6,077	9,102
	No SEND	29,157	40,554
Ethnicity	Asian	8,562	11,383
	Black	4,391	6,244
	Chinese	763	996
	Mixed	3,988	5,850
	Other	1,769	2,629
	Unclassified	476	688
Religion	White	15,249	21,827
	Christian	13,773	19,806
	Hindu	3,049	4,183
	Jewish	175	672
	Muslim	7,988	10,246
	No religion	8,322	11,652
	Other	1,475	2,314
	Unclassified	430	761

Note: the sum of pupils by ethnicity and religion does not equal the total number of pupils. This is because some granular categories with fewer than 10 pupils are suppressed and therefore cannot be included in the aggregated groups.

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