

Cost of Schooling 2007

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BMRB Social Research

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Executive summary

Introduction

This research brief presents findings from the Cost of Schooling 2007 study, carried out by BMRB on behalf of the Department for Children, Schools and Families (DCSF).

The 2007 study updates findings from a study of the cost of schooling in 2003, commissioned and published by the then Department for Education and Skills (DfES) in 2004. Both studies investigated the additional costs to parents/carers of sending a child to maintained primary and secondary school in England.

Key findings

- The total amount spent by parents/carers in 2007 was, on average, £683.79 for a child at primary school and £1,195.47 for a child at secondary school.
- Overall costs had increased very slightly (after adjusting for inflation) since 2003. The average increase was £34 (a 4 per cent increase).
- Most parents/carers were happy overall with the costs associated with their child's schooling: 23 per cent were very happy and 60 per cent were quite happy. However, 13 per cent of parents/carers were not very happy and 3 per cent were not at all happy with the costs. This represents a slight decline in happiness since 2003.
- Six per cent of parents/carers said they found it very difficult to meet the costs associated with their child's schooling and 32 per cent found it quite difficult; while 47 per cent of parents/carers found it quite easy and 14 per cent found it very easy. This represents a slight decline in ease of meeting costs since 2003.
- Families with incomes of less than £15,000 were less likely to be happy with the costs of schooling, and more likely to find it hard to meet the costs compared to families with higher incomes.

Background and research questions

Although education in maintained schools is nominally free, there are a number of costs to parents/carers associated with a child's education that can have an impact on family budgets.

In 2004, the then DfES commissioned a study to investigate the costs associated with sending a child to maintained school in England, and parents'/carers' attitudes to

those costs (DfES Research Report 588). In 2008, the DCSF commissioned a follow-up study to update the findings and investigate change over time. The studies investigated costs that were incurred in the calendar years 2003 and 2007.

The research questions for the study of costs in 2007 included:

- What are the costs to parents and carers when sending their children to maintained primary and secondary schools in England?
- What voluntary contributions are parents and carers asked for by schools?
- What arrangements do schools have for asking for contributions?
- What happens if parents and carers are unable to meet certain costs?
- What role do children play (if any) in mediating what parents and carers pay for or know about?
- How do costs vary across different types of schools and across year groups?
- Have costs to parents and carers increased or decreased in real terms since 2003?
- Have there been any changes in the nature of what parents and carers are required or requested to pay for, and what is the impact of any change?
- Are parents/carers happy or unhappy with the costs of schooling, and have their views changed since 2003?
- Do parents/carers find it easy or difficult to meet the costs of schooling, and has this changed since 2003?

Methodology

The study involved three strands:

- A telephone survey of an achieved representative sample of 1,500 parents/carers of children aged 5 to 16 attending maintained schools in England, using random digit dialling.
- A self-completion survey of maintained primary and secondary schools, with postal and online response options. Questionnaires were completed by 147 primary schools (a 38 per cent response rate) and 61 secondary schools (a 19 per cent response rate).
- A face-to-face survey of an achieved representative sample of 1,166 children aged 10 to 16 (using BMRB's Youth Omnibus survey).

The samples for these three strands were not linked. Fieldwork for all three strands of the research took place between March and June 2008. (In the previous study, the parents/carers and schools fieldwork took place between February and April 2004, and the fieldwork with children between April and June 2004.)

In addition, a literature review was conducted to identify and synthesise findings from other research on the costs of schooling. Findings from the literature review can be found in the full report.

When comparing 2003 costs with 2007 costs, 2003 costs have been adjusted for inflation using the Retail Price Index.

Main findings

Total annual spending

The average total amount spent by parents/carers on the costs associated with a child's primary school education in 2007 was £683.79, and for secondary school children the average was £1,195.47.

Costs were generally higher for boys than girls:

- At primary school, the average total amount was £691.88 for boys compared to £675.59 for girls.
- At secondary school, the average total amount was £1,235.09 for boys compared to £1,153.74 for girls.

Costs were lower on average for households with incomes of less than £15,000 per year – although not substantially lower:

- For those with household incomes of less than £15,000, the average total amounts were £646.67 at primary school and £1,117.16 at secondary school.
- For those with household incomes of £15,000 or more, the average total amounts were £695.58 at primary school and £1,236.40 at secondary school.

On average the total amount parents/carers spent on their child's education had increased by £34 since 2003 (after adjusting for inflation). This represents a 4 per cent increase in the costs of schooling.

Even though the overall costs have risen slightly, the cost of many individual items/activities has decreased or remained about the same since 2003. This suggests that parents/carers on average paid for more items/activities in 2007 than they did in 2003.

Uniform and PE kit

Almost all parents/carers (98 per cent) said that their child's school required children to wear a uniform. Where a uniform was required, the total annual cost of uniform was £184.17 on average, and higher for secondary school children than for primary school children (£211.60 compared to £163.72). In secondary schools, the total annual cost was higher for boys than girls (£219.57 compared with £203.21), due to greater spending on school shoes. The most expensive items of uniform were shoes and blazers.

Individual items of uniform tended to cost less in 2007 than in 2003, although parents/carers tended to buy more items in 2007 than they did in 2003. On average, the total cost of school uniform in 2007 was £184.17 compared to £179.47 in 2003 (adjusted for inflation); however, socks were not included in the 2003 total cost, and these cost an average of £10 in 2007.

Nine in ten parents/carers said their child needed some form of PE kit, with more specialist and seasonal items being more common in secondary schools. As these items tended to be relatively expensive, the total cost of PE kit in 2007 was much higher for children at secondary school than at primary school (on average £129.74 compared with £53.22, where PE kit was required). In secondary schools, this total cost was higher for boys than girls (£155.26 compared with £102.11), because of the cost of football or rugby shirts and boots.

Overall, the average cost of PE kit in 2007 was £87.22, slightly lower than in 2003 after adjusting for inflation (the adjusted 2003 cost was £89.42, and did not include socks, while the 2007 cost did).

One in six parents/carers (17 per cent) said that all items of uniform and PE kit had to be bought from a designated shop or the school itself, while 22 per cent said that all items could be bought from anywhere (the remainder said that only some items had to be bought from the school or a designated shop). Restrictions were more likely to be in place in secondary than primary schools. These figures were very similar to those obtained in 2003, despite recent DCSF guidance to schools¹ that items should be available from a wide variety of outlets instead of a sole supplier.

The majority of parents/carers said that at least one item of uniform required a logo (97 per cent in secondary schools and 80 per cent in primary schools). In most of these cases (79 per cent), the items had to be bought with the logo, rather than being sewn on.

¹ www.teachernet.gov.uk/management/atoz/u/uniform

Overall, one in three parents/carers said that second hand uniform was available from the school, either to buy or free of charge, and where this was the case the total cost of uniform was lower, in both primary and secondary schools.

Four per cent of parents/carers said that they received financial help with buying their child's school uniform. This figure was 11 per cent for those with an annual income of less than £10,000 per year. The overall proportion of parents/carers receiving financial help has not changed since 2003.

School trips

The majority of parents/carers (87 per cent) said they had been asked to pay for a school trip in 2007, and in most cases (92 per cent) the child went on the trip.

The average cost of a day trip was £9.47 in primary schools and £21.70 in secondary schools. Residential trips in the UK were of a similar cost in primary and secondary schools (£153.14 and £160.07 respectively), while residential trips abroad cost £402.70 on average (figure for secondary schools only). Costs were similar to those recorded in 2003 (after adjusting for inflation).

Overall, 44 per cent of parents/carers were offered the opportunity to pay by instalments, and this was higher for residential trips (89 per cent).

Around two in three parents/carers (68 per cent) said that they had been asked to make a voluntary contribution towards a school trip that took place in school hours during 2007. Almost two fifths (38 per cent) were aware that no compulsory charge should be made for these trips².

The schools survey found that compulsory charges were imposed for one in ten curricular trips in primary schools and three in ten curricular trips in secondary schools, even though no compulsory charge should be made for these trips³.

Half of parents/carers said that they sometimes felt pressurised into paying for school trips.

Curriculum materials and stationery items

Parents/carers of secondary school children were more likely than those with primary school children to say they had to pay for various class materials. Overall, the

² Education Act 1996 (Sections 449-462), as amended by the School Standards and Framework Act 1998 and the Education Act 2002.

³ Ibid.

average annual cost for music lesson materials was £102.65, and £65.90 for cookery materials. The annual cost of other class materials ranged from £10 to £33 on average. Annual costs were generally similar in 2007 and 2003 (after adjusting for inflation).

Parents/carers of primary school children did not generally have to provide as many stationery items as parents/carers of secondary school children. As a result, the average total spend on stationery items was lower for primary than secondary school children: £4.40 compared to £25.51.

Swimming lessons

Twelve per cent of parents/carers reported being asked to pay for swimming lessons in 2007, and most of these were parents/carers of primary school children. Amongst those that were asked to pay, the average total amount spent on swimming lessons in 2007 was £69.20.

There was a small minority of schools (6 per cent of primary and 4 per cent of secondary schools) that made a compulsory charge for swimming lessons, while a higher proportion asked for voluntary contributions (28 per cent of primary schools and 14 per cent of secondary schools). Amongst schools that did ask for a voluntary contribution, the average amount per lesson was £2.03 for primary schools and £1.72 for secondary schools.

School fund

Twenty nine per cent of parents/carers were asked to contribute to the school fund. (33 per cent of parents/carers of secondary school children and 27 per cent of parents/carers of primary school children).

Parents/carers were asked to contribute an average of around £35 a year. The average annual contribution requested by secondary schools was higher than the average requested from primary schools (£44 compared with £27). Parents/carers with higher incomes were more likely to be asked to contribute larger amounts compared with parents/carers on lower incomes; the average amount was £25 for parents/carers with incomes of less than £25,000 compared with £41 for parents/carers with incomes of £25,000 or more.⁴

⁴ Household income is based on the amount of annual income that the respondent said their household earned before tax is deducted. However, some caution needs to be taken as respondents may not have included tax credits.

Over a quarter (28 per cent) of schools said they asked parents/carers to contribute towards the school fund. All schools that asked for contributions said they were voluntary. The school fund was used most frequently as a means to support school trips; almost two thirds (64 per cent) of schools asking for contributions said this.

School lunch

Children in primary schools were more likely than their secondary school counterparts to take a packed lunch (63 per cent versus 52 per cent). Secondary schoolchildren were more likely to have had a school dinner (41 per cent compared with 35 per cent of primary schoolchildren).

The reason given most frequently by parents/carers as to why their child did not usually have a school meal was that their child preferred their usual lunch arrangement (55 per cent). However, a minority (6 per cent) said meals were not available at the school⁵.

The average daily amount spent by parents/carers on meals during the school day was £1.86 (£1.97 when excluding parents/carers whose child was eligible for free school meals). Meals were generally more expensive for secondary school children compared with their primary school counterparts (the average daily cost was £2.09 for secondary schoolchildren and £1.69 for primary schoolchildren)

A third (32 per cent) of parents/carers whose child was eligible for free school meals said their child did not take up the free school meal. The main reason (given by 69 per cent of these parents/carers) was that the child preferred another lunch arrangement such as taking their own food or eating at home.

Travel

Children were most likely to travel to school by walking (48 per cent) or by car (32 per cent).

Children from low-income households (less than £15,000) were more likely than those from higher income households (£15,000+) to walk to school (55 per cent versus 44 per cent), and were less likely go by car (26 per cent versus 34 per cent).

⁵ N.B. Where the funding is delegated to them, schools must provide a lunch to any child eligible for Free School Meals and to any other child if requested to do so, but there is no automatic requirement to provide a lunch.

Over half (53 per cent) of parents/carers whose child traveled to school by public transport, taxi or school bus said the local authority paid for this. In 2003, 26 per cent of parents/carers said local authorities paid.

Parents/carers who paid for their child to travel to school by public transport, school bus or taxi spent an average amount of £9.54 a week.

Other expenditure

School photographs

Two-thirds of parents/carers (67 per cent) had bought school photographs in 2007, and the average amount they spent was £18.86.

Schools were asked to give the cost of the basic package of school photographs, which was £10.77 for primary schools and £11.90 for secondary schools.

Charity contributions

Nine in ten parents/carers (91 per cent) had been asked to contribute cash or items to charity on behalf of their child in 2007, and most of these had been asked on several occasions. The average contribution per event was £2.56.

Schools held an average of just over three charity or non-uniform days each year. The average contribution requested for such events was £0.83 for primary schools and £1 for secondary schools.

Other activities

Three quarters of parents/carers (75 per cent) had been asked to contribute to other school activities such as cake stalls, raffles and jumble sales. The total spend on such items/activities in 2007 was £12.47 on average.

Attitudes towards costs of schooling

When asked how happy they were with all the costs associated with their child's schooling, 23 per cent of parents/carers were very happy, 60 per cent were quite happy, 13 per cent were not very happy and 3 per cent were not at all happy. Parents/carers of primary school children were generally happier with the costs, as were those with higher incomes, and those who had spent less in total.

Happiness with the cost of schooling has declined slightly over time. The proportion of parents and carers that were very or quite happy declined from 90 per cent in 2003 to 83 per cent in 2007; and the proportion who were not very or not at all happy increased from 9 per cent to 16 per cent.

Eight in ten parents/carers (79 per cent) were very or quite happy with the costs of uniform and PE kit, but 15 per cent were not very happy and 5 per cent were not at all happy. Parents/carers with lower incomes were generally less happy, as were those who had to buy uniform and PE kit from a designated outlet, rather than being able to buy it from anywhere.

Around seven in ten parents/carers (72 per cent) were very or quite happy with the costs of school trips, but 20 per cent were not very happy and 7 per cent were not at all happy. Again, parents/carers with lower incomes were generally less happy with the costs, as were those who had been asked to pay for more than two trips.

Ease of meeting the costs of schooling

Fourteen per cent of parents/carers said they found it very easy to meet costs, while 47 per cent found it quite easy. Nearly a third (32 per cent) found it quite difficult, while a significant minority (6 per cent) found it very difficult. Amongst families with incomes of £35,000 or more 20 per cent said it was difficult to meet costs, but this figure rose to two-thirds (65 per cent) of families with incomes of less than £15,000.

Ease of meeting the costs of schooling has declined slightly since 2003. The proportion of parents and carers that found it very or quite easy to meet costs declined from 72 per cent to 61 per cent; and the proportion who found it very or quite difficult increased from 27 per cent in 2003 to 38 per cent in 2007.

Financial help available

One in five parents/carers (20 per cent) said they were aware of financial assistance available from their child's school. In contrast to this three-quarters (76 per cent) of schools said financial assistance was available from the school fund. However, only a third of schools that offered this assistance said it was publicised, which may explain the discrepancy.

Awareness of assistance was lower amongst families with incomes of less than £15,000, although it is not possible to say whether this is due to lack of publicity or lack of assistance available in the schools their children attend.

Findings from the survey of children

The survey of children found that just over two thirds (68 per cent) said they always passed on letters from the school requesting payment from parents/carers, and a quarter said they passed on such letters most of the time.

Two thirds (65 per cent) of those who said they did not always pass on requests from the school for payments to parents/carers said they had forgotten, while a quarter said they had not wanted to go on the trip or take part in the activity. Children from

lower income households were more likely than those with higher household incomes to say they did not pass on requests for money because they thought their parents/carers could not afford it (7 per cent where annual household income was less than £15,000 compared with 1 per cent for those with an annual income of £15,000 or more).

Children were asked for their level of agreement with the statement 'Sometimes my parents/carers find it difficult to afford things that I need for school'. Seven in ten respondents (70 per cent) disagreed with this statement. However, children from households with an income of less than £15,000 a year were more likely to agree with the statement when compared with respondents from households earning £15,000 or more (42 per cent versus 21 per cent).

Introduction

Background to the study

Although education in maintained schools is nominally free, there are a number of costs to parents/carers associated with a child's schooling that can have an impact on family budgets. These costs can include school uniform, PE kit, transport, school meals and school trips, amongst others.

In order to investigate the impact of the cost of schooling on low income families, the then Department for Education and Skills (DfES) commissioned BMRB Social Research to carry out a research project to investigate the costs associated with sending children to maintained schools in England incurred during 2003.

The 2003 study estimated that the annual cost to parents/carers of sending a child to school was approximately £560 for primary school children, and approximately £950 for secondary school children.

The Department for Children, School and Families (DCSF) commissioned BMRB Social Research to conduct a repeat survey of costs in 2007 to investigate the costs of schooling that are met by parents and carers in England and any change over time.

Aims of the research

The DCSF commissioned this study to answer the following research questions:

- What are the costs to parents and carers when sending their children to maintained primary and secondary schools in England?
- What voluntary contributions are parents and carers asked for by schools?
- What arrangements do schools have for asking for contributions?
- What happens if parents and carers are unable to meet certain costs?
- What role do children play (if any) in mediating what parents and carers pay for or know about?
- How do costs vary across different types of schools and across year groups?
- Have costs to parents and carers increased or decreased in real terms since 2003?
- Have there been any changes in the nature of what parents and carers are required or requested to pay for, and what is the impact of any change?

- Are parents/carers happy or unhappy with the costs of schooling, and have their views changed since 2003?
- Do parents/carers find it easy or difficult to meet the costs of schooling, and has this changed since 2003?

Methodology

A key consideration for the approach was that findings would need to be comparable with the 2004 survey. For this reason a very similar approach was adopted, and questionnaires were also kept largely similar, although amendments were made to make sure the questionnaires were up to date and relevant.

A considerable amount of development work had been undertaken before the 2004 survey to inform both the methodology and questionnaire design. Further development work was not considered necessary, although a pilot was conducted to test the parents/carers questionnaire.

As well as the three strands of survey research described below, a literature review was conducted to gather findings from other research that had been conducted around this subject matter. This literature review can be found in chapter 14 of this report.

Parents/carers survey

The survey of parents/carers was carried out using a random-digit dialling telephone survey. Interviewers screened households to ensure that the respondent had a child aged 5 to 16 in maintained education and that (s)he was the person best able to discuss the costs associated with their child's education. If there was more than one child aged 5 to 16 in maintained school in the household, one was selected at random using the most-recent-birthday rule. All questions in the survey then related to the selected child.

1,500 parents/carers were interviewed. Of those households that had been screened and were known to be eligible for the survey 95 per cent took part.

Schools survey

The survey of schools was carried out using a 14 page postal questionnaire, with an option to complete the questionnaire online. All selected schools were sent a questionnaire and asked to complete and return it within 3.5 weeks. A reminder strategy was then implemented:

- Schools that had not responded to this initial mailout were sent a reminder letter with an additional copy of the questionnaire, and asked to complete and return it within 3 weeks.
- Schools that did not respond to this reminder were then telephoned and asked to complete the questionnaire within 2 weeks.
- Finally, schools that had said at the telephone chase stage that they would complete and return the questionnaire, but had not done so, were sent a reminder letter asking them to return the questionnaire.

Schools were selected for the survey using a stratified random sample of maintained schools in England taken from EduBase. EduBase is a register of all educational establishments in England and Wales, maintained by the DCSF.

208 schools took part in the survey which represents a 29 per cent response rate.

Children's survey

A small number of questions were included on BMRB's Youth Omnibus. These were asked of children aged 10 to 16 in maintained education. This was to try to assess how often they passed on school requests for money to their parents/carers; if they did not, why; and their perception of their family's ability to pay for the things that were requested.

1,166 children were interviewed. As this survey was undertaken using random location sampling (a form of quota sampling) a response rate cannot be applied.

It should be noted that the samples for the three strands of research were not linked, so the schools that took part in the schools survey are not the schools that are attended by the children of the respondents to the parents/carers survey.

Timing of fieldwork

Parents/carers telephone survey

The pilot stage of the parents/carers survey (to test the questionnaire) took place from 25th to 30th March 2008. Main stage fieldwork was carried out between 6th May and 15th June 2008.

Schools postal and web survey

The fieldwork period for the schools stage of the project ran from 16th April to 30th June 2008. This included a telephone chase of non responders carried out 2nd to 20th June.

Children's Youth Omnibus survey

Questions were asked as part of BMRB's weekly face to face Youth Omnibus between 20th March and 18th June 2008.

Notes on reading the report

The percentages within charts and tables in the report do not always add up to 100 per cent. In some cases this is because respondents were able to give more than one answer to the question. In other cases, where only one answer was allowed, this is due to a small proportion of respondents replying 'don't know', or to computer rounding.

Comparisons with previous survey data

Throughout the report findings are compared, where possible, to findings from the previous Cost of Schooling survey conducted in 2004. The 2004 parents/carers survey asked about costs in 2003 and the 2008 parents/carers survey asked about costs in 2007 so when comparisons are made it is these years that are compared.

When costs are compared, data from 2003 has been adjusted for inflation using the retail price index. For more details see appendix A.

Subgroup comparisons

Throughout the report various crossbreaks have been examined to see where there are differences between subgroups. Some of the key crossbreaks used in the report are:

Income: the parents/carers questionnaire collected banded gross household income. The question asked of respondents was "In which of the following bands does your TOTAL annual household income fall before tax is deducted?", using the following income bands:

- Less than £3,000 per year
- £3,000 - £5,999 per year
- £6,000 - £9,999 per year
- £10,000 - £14,999 per year
- £15,000 - £24,999 per year
- £25,000 - £34,999 per year
- £35,000 - £49,999 per year

- £50,000 or more per year

1,390 out of 1,500 parents/carers provided an answer about their household income.

Social grade: this socio-economic status variable has been assessed using an occupational classification system completed by the interviewer based on the occupation of the chief income earner in the household (who was not necessarily the respondent themselves). The classification consists of the following codes, and examples are shown:

- A: Upper middle class: Higher managerial administrative or professional occupations such as a doctor, solicitor, accountant;
- B: Middle class: Intermediate managerial administrative or professional people such as a teacher, nurse, or police officer;
- C1: Lower middle class: Supervisory or clerical and junior managerial administrative or professional occupations such as junior manager, student, or clerical worker;
- C2: Skilled working class: Skilled manual workers such as a foreman, plumber, or bricklayer;
- D: Working class: Semi and unskilled manual workers such as shop workers, apprentices;
- E: Those at the lowest levels of subsistence. All those entirely dependent on the State long term through sickness, unemployment, old age or other reasons, casual workers and those without a regular income.

These groups are often combined during the report to show which groups are above or below the average for a particular question.

Statistical significance

Throughout the report when comparing subgroups and when comparing findings from 2007 to 2003 differences are only reported on if they are significant at the 95% confidence level (using a 2 tailed Z test).

1 Sample profile

1.1 Parents/carers - final sample profile

A breakdown of the final weighted sample profile of the parents/carers survey (1,500 interviews) is shown below. Details on weighting and response bias checks are included in Appendix C.

Table 1.1: Profile of respondents	
Base: All Respondents (1,500)	
	%
Type of School	
Primary	58
Secondary	42
Child's eligibility for free school meals	
Yes (eligible)	12
No (not eligible)	87
Don't know	1
Social grade of respondent ⁶	
A	7
B	19
C1	33
C2	18
D	13
E	9
Don't know/refused	1

⁶ Social Grade Classification as follows : A - Upper middle class: Higher managerial administrative or professional occupations B - Middle class: Intermediate managerial administrative or professional people. C1- Lower middle class: Supervisory or clerical and junior managerial administrative or professional occupations. C2- Skilled working class: Skilled manual workers. D - Working class: Semi and unskilled manual workers. E - Those at the lowest levels of subsistence. All those entirely dependent on the State long term through sickness, unemployment, old age or other reasons, casual workers and those without a regular income.

Annual household income	
Less than £,3000	2
£3,000 - £5,999	4
£6,000 - £9,999	6
£10,000 - £14,999	10
£15,000 - £24,999	17
£25,000 - £34,999	17
£35,000 - £49,999	20
£50,000 or more	18
Don't know/refused	6
Ethnicity of respondent ⁷	
White	89
Black	3
Asian	4
Mixed	1
Other	2
Don't know/refused	1

⁷ 'Mixed' ethnicity includes respondents who considered themselves belong to more than one ethnic group, for example mixed race respondents with one White parent and one Black parent. 'Other' ethnicity was self-defined so could include any ethnic group that respondents did not feel was covered by 'White', 'Black', 'Asian' or 'Mixed'.

1.2 Schools – final sample profile

A breakdown of the final sample profile of the schools survey is shown below. A relatively low response rate was achieved in the schools survey – 29 per cent overall (38 per cent amongst primary schools and 19 per cent amongst secondary schools). This may have had a negative impact on the reliability of the data. As discussed previously, non-responding schools were chased on several occasions. It is worth noting that the overall pattern of non-response did not vary significantly by school type or other characteristics. Appendix C shows the profiles of responding schools compared to population figures.

The response rate represents a decrease from 40 per cent (51 per cent in primary schools and 27 per cent in secondary schools) in the previous Cost of Schooling survey. This may in part be explained by a general decline in response rates achieved in school surveys.⁸

The data for secondary schools have been weighted in terms of type of funding to reflect the overall profile of secondary schools in England. The actual achieved percentage is shown in brackets. Weighting was not required for primary schools.

⁸ A study of suitable methods for raising response rates in school surveys, Patrick Sturgis, Patten Smith and Graham Hughes, DCSF: 2006, RB721

Table1.2: Profile of respondents

Base: All Responding Schools (208)

	Primary (n=147) %	Secondary (n=61) %
Type of Funding		
Community	63	64 (70)
Foundation	1	19 (11)
Voluntary aided	24	17 (17)
Voluntary controlled	12	* (*)
Location		
Urban LA	67	88 (87)
Rural LA	33	12 (13)
Number of children		
>100	16	-
101-200	25	-
201-300	33	-
301-500	24	9
501-1000	2	43
1000+	-	48

1.3 Children's survey - final sample profile

Details of weights applied to children's survey data can be found in Appendix C.

Table1.3: Profile of respondents	
Base: All Respondents (1,166)	
	%
Gender	
Male	51
Female	49
Age	
10-11	29
12-13	29
14-15	25
16	17
Social grade	
AB	25
C1	29
C2	21
D	17
E	8
Annual household income	
Less than £,3000	3
£3,000 - £5,999	4
£6,000 - £9,999	5
£10,000 - £14,999	8
£15,000 - £24,999	12
£25,000 - £34,999	12
£35,000 - £49,999	11
£50,000 or more	11
Don't know/refused	34

Survey Findings

2 Total annual spending

In this chapter the costs given for each area have been combined to calculate the total annual spending for each respondent on all items of expenditure associated with sending a child to maintained school⁹. Subsequent chapters examine parents/carers spending on individual areas of cost.

Please note that average annual costs examined in this chapter are based on all 1,500 parents/carers involved in the survey. This means the average costs shown in this chapter are based on all respondents and therefore include all those parents/carers who have spent nothing on a particular area of expense. In later chapters costs are examined only for parents/carers who had incurred that particular cost and so average costs are different to those shown in table 2.1.

Table 2.1 shows the average annual spending on each area of expense for parents/carers of primary and secondary schoolchildren.

As shown in table 2.1, for parents/carers of primary schoolchildren, the average total annual spending was £683.79, and the areas of expenditure that contributed most to this figure were school lunch, uniform, school trips and PE kit.

This table shows that costs were considerably higher for parents/carers of secondary schoolchildren, amongst whom the average total annual spending was £1,195.47. The areas of expenditure that contributed most to this figure were again school lunch, school trips, uniform and PE kit, as well as class materials.

⁹ Total annual costs were calculated in four stages. Stage 1 involved calculating average costs for each area of expenditure. These average costs were applied in cases where the cost was incurred but respondents could not remember the amount and answered 'don't know'. Stage 2 involved re-calculating all costs given to annual figures, including all cases where there was no expense for a particular area of cost. Stage 3 involved calculating average costs for each area of expenditure (after including cases with no expense) and applying these averages to cases where the question was not asked. The final stage was to add together all relevant costs to get the total annual cost. Please see the technical appendix for a more detailed discussion of how these costs were reached.

Table 2.1: Average spend on all items in 2007 for parents/carers of primary schoolchildren

Base: All parents/carers (1,500)

	Primary (n=866)	Secondary (n=634)
Uniform	£158.99	£208.99
PE kit	£46.22	£122.85
School trips	£78.44	£289.71
Class materials	£27.15	£95.52
Stationery items	£4.40	£25.51
Swimming lessons	£15.08	£0.00
School fund	£7.34	£14.49
School lunch	£304.84	£376.69
Travel	£6.20	£41.07
School photographs	£15.14	£9.26
Charity contributions	£8.79	£5.02
Other activities/items	£11.21	£6.35
Total annual spending	£683.79	£1,195.47

2.1 Gender of child

Spending on male children was slightly higher than spending on female children, particularly amongst secondary schoolchildren. Much of the cost difference between girls and boys at secondary schools can be explained by boys having higher costs for school uniform, and particularly for PE kit, as shown in table 2.2.

Table 2.2: Total average spend on all items in 2007 by type of school attended and gender

Base: All parents/carers (1,500)

	Total annual expenditure	Annual expenditure on uniform	Annual expenditure on PE kit
Primary male (n=439)	£691.88	£159.53	£46.76
Primary female (n=427)	£675.59	£158.43	£45.66
Secondary male (n=325)	£1,235.09	£216.46	£148.74
Secondary female (n=309)	£1,153.74	£201.10	£95.47

2.2 Household income

As might be expected, there was a link between the total spending on costs of schooling and household income. Parents/carers with household incomes of less than £15,000 per year spent less on average than those with higher incomes. These results are shown in table 2.3.

Table 2.3: Total average spend on all items in 2007 by household income

Base: All parents/carers who gave their household income (1,390)

	Primary	Secondary
Less than £15,000 (n=315)	£646.67	£1117.16
£15,000 - £34,999 (n=499)	£698.24	£1278.95
£35,000 or more (n=576)	£693.32	£1204.31

These differences by income are greatly reduced (and no longer statistically significant) when looking at the total cost excluding school meals. This suggests that the lower costs for those with lower incomes can be (at least partly) explained by families with lower incomes being eligible for free school meals, and therefore spending less on school lunch.

Amongst low income families (those with household incomes of less than £15,000 a year), those in work¹⁰ had spent more on average on their child's schooling in 2007

¹⁰ Where the chief income earner in the household was working either full time or part time

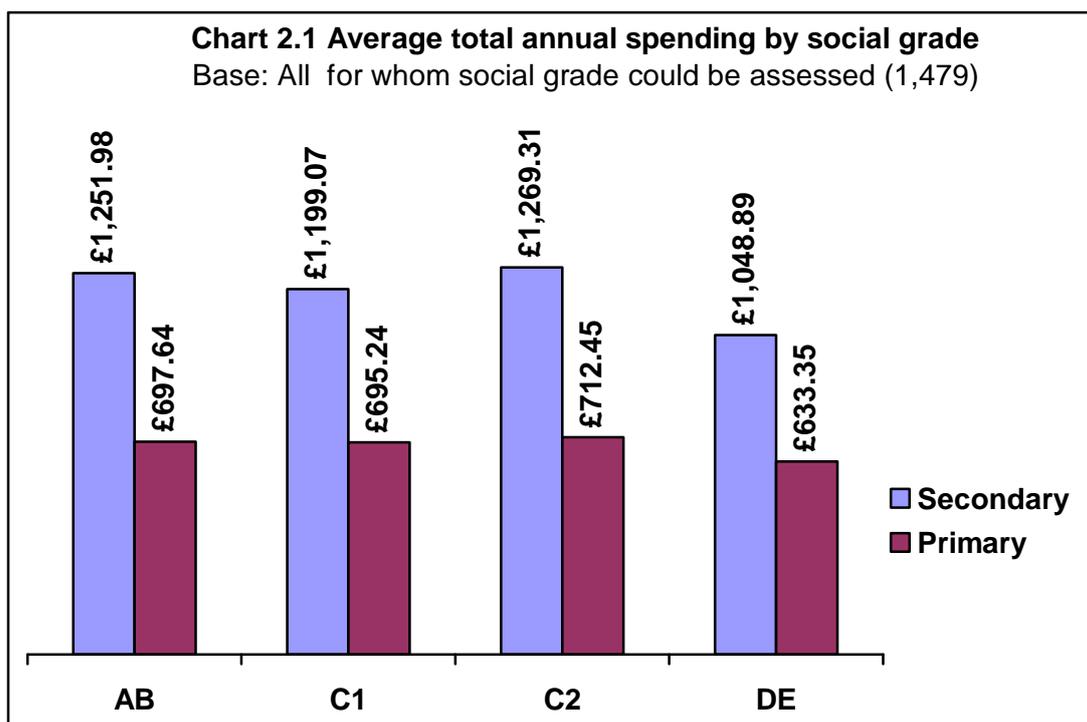
than those who were not working. This difference was significant for parents/carers of primary schoolchildren, but not for secondary schools (due to the smaller base sizes available). The average amounts spent by low income families on their child at primary school were:

- £712.11 amongst those in work
- £518.53 amongst those not in work

Again, this difference is lessened (and no longer statistically significant) if the cost of school meals is excluded, suggesting that free school meals may well be the cause of much of the difference in costs.

2.3 Social grade

Social grade is closely related to household income, and shows a similar pattern. Parents/carers in lower social grades (D and E) spent less on average than those in higher social grades¹¹.



¹¹ Examples of social grades are: A - doctor, solicitor, accountant; B - teacher, nurse, police officer; C1 - junior manager, student, clerical worker; C2 - foreman, plumber, bricklayer; D - manual workers, shop workers, apprentices; E - casual labourers, state pensioners, unemployed. A fuller explanation is included in the introduction of this report.

2.4 Free school meals

Total costs were examined by eligibility for free school meals. Firstly, the total annual costs *including* money spent on school meals were compared. These data are shown in table 2.4.

Table 2.4: Total average spend on all items in 2007 by qualification for free school meals

Base: All parents/carers who knew whether their child was eligible for FSM (1,462)

	Total average annual expenditure
Qualify – primary (n=104)	£533.79
Not qualify – primary (n=742)	£707.07
Qualify – secondary (n=63)	£951.51
Not qualify – secondary (n=553)	£1224.29

Table 2.4 shows that parents/carers of both primary and secondary schoolchildren who did not qualify for free school meals spent more than those who did qualify.

However, as shown earlier in this section, school meals were, on average, the largest area of expenditure for parents/carers of both primary and secondary schoolchildren. It is therefore useful to compare the total expenditure *excluding* school meals, this is shown in table 2.5.

Table 2.5: Total average spend excluding spending on school meals by qualification for free school meals

Base: All parents/carers who knew whether their child was eligible for FSM (1,462)

	Total average annual expenditure excluding school meals
Qualify – primary (n=104)	£360.57
Not qualify – primary (n=742)	£383.64
Qualify – secondary (n=63)	£767.15
Not qualify – secondary (n=553)	£824.22

Once spending on school meals had been excluded from the total, the average expenditure was not statistically significantly different between families who did qualify for free school meals, and those that did not.

2.5 Comparisons with 2003

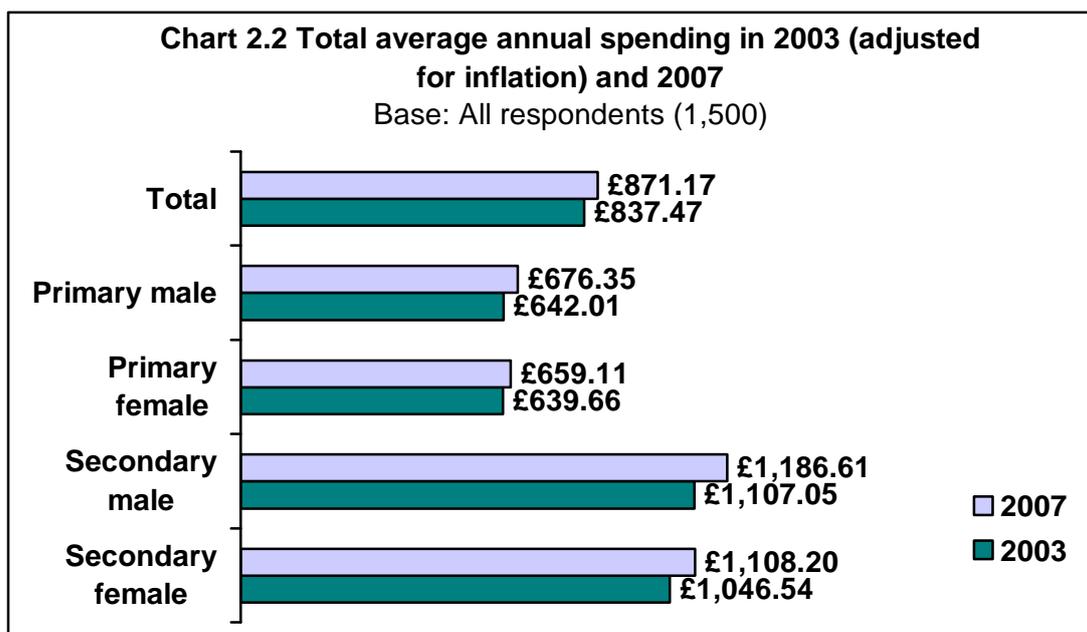
In order to make comparisons with 2003 some items had to be removed from the total costs calculation (stationery items, school uniform socks, PE kit socks, and deposits for textbooks, lockers or other items) as these items were not included in the previous survey. There was also one cost that was excluded from 2003 data for the purposes of comparison (materials for sewing lessons). This has ensured that a like-for-like comparison has been made, but means the figures in this section differ slightly from those in the rest of this chapter.

The total amount parents/carers were spending on their child's education was slightly higher in 2007 than in 2003¹². The overall average cost for all respondents was £837.47 in 2003 and £871.17 in 2007, an increase of around £34. This represents a 4 per cent increase in the costs of schooling between 2003 and 2007.

This slight increase in costs may seem surprising given that the cost of many individual items/activities has decreased or remained about the same since 2003. The reason for the increase therefore seems to be that parents/carers were asked to pay for more items/activities in 2007 than they were in 2003.

Chart 2.2 shows the average annual spending for 2003 (adjusted for inflation) and 2007 broken down by school type and gender.

¹² 2003 costs have been adjusted for inflation using the RPI



Analysis was undertaken to assess what sort of parents/carers had found costs increased in 2007 by looking at breakdowns by income. Families with mid-range incomes (between £15,000 and £34,999 per year) experienced a 12 per cent increase in costs between 2003 and 2007, while those with lower or higher incomes had not seen a rise in costs.

2.6 Total annual spending as a proportion of income

It is possible to make a very approximate estimate of the proportion of parents/carers' income being spent on sending their children to maintained school. In order to do this the number of children aged 5-16 attending maintained school in each household has been taken into account: parents/carers gave costs for one child only when they were surveyed, and the total costs for this child have been multiplied by the number of children in the household.

It should be noted that there are several sources of inaccuracy in this analysis:

- Exact income was not collected: parents/carers were instead asked which band their income fell into. For the purposes of this analysis the midpoint of each band has been used.
- Gross household income was collected, rather than take-home income.
- Where respondents had more than one child at maintained school, it's likely that the costs are not identical for each child (spending requirements vary by school year, by gender, by subjects studied and activities undertaken).

- The analysis does not take account of the fact that there may well be cost savings for parents/carers with more than one child at maintained school (for example uniform and PE kit items might be passed down to younger siblings).

Overall, Over half (59 per cent) of parents/carers were spending 5 per cent or less of their income on the costs of sending their children to maintained school, whilst a notable minority (8 per cent) were spending over 20 per cent of their household income on this.

As shown in table 2.6 parents/carers with lower incomes tended to spend a higher proportion of their income on their children's schooling than parents/carers with higher incomes, and the proportion of income spent on children's schooling also increased with the number of children in the household.

Table 2.6: Total spend on costs of schooling on ALL children in household as a proportion of household income

Base: All parents/carers who gave their household income (1,390)

		Up to 5%	6% - 10%	11% - 20%	21% or more
All parents/carers (n=1390)	%	59	21	12	8
<u>Household income</u>					
Less than £15,000 (n=315)	%	14	27	31	27
£15,000 - £34,999 (n=499)	%	55	29	12	4
£35,000 or more (n=576)	%	88	10	1	*
<u>Number of children in household</u>					
1 (n=638)	%	74	15	8	3
2 (n=591)	%	52	25	13	10
3 or more (n=161)	%	26	30	25	20

3 Uniform and PE kit

In October 2007 non-statutory guidelines were issued to schools from the DCSF with regards to school uniform. The guidance encourages all schools to have a school uniform, but states that any set policy must be affordable, non-discriminatory and sensitive to the needs of children. The guidance states that “no school uniform should be so expensive as to leave pupils or their families feeling unable to apply to, or attend a school of their choice, due to the cost of the uniform”.

The guidance also advises that schools that have exclusive contracts with suppliers may be subject to enforcement action under the terms of the Competition Act. Overly expensive uniform policies may also contravene the Schools Admissions Code, which places a statutory duty on all governing bodies to ensure that their policies and practices do not disadvantage any children.

This chapter examines these issues, by asking parents/carers and schools whether a uniform and PE kit are required, what items make up the uniform/kit and their estimate of the cost of each item. It then looks at any restrictions over where uniform can be bought, whether schools make second-hand uniforms available to parents/carers, and whether parents/carers receive any financial assistance with buying their child’s school uniform.

3.1 Uniform requirements

Virtually all parents/carers (98 per cent) said that their child’s school required children to wear a school uniform. This is higher than the figure recorded in the 2003 survey (95 per cent). As in the previous survey, parents/carers whose child was at primary school were slightly less likely to say that their child needed a uniform than those whose child was at secondary school (97 per cent compared with 99 per cent in the 2007 survey).

Parents/carers survey - Which items of uniform are required?

Parents/carers were then asked which items their child’s school uniform consisted of. A list of possible items was then read out – tailored according to the child’s gender – and parents/carers were asked to confirm which items were included in their child’s uniform. Chart 3.1 shows the percentages for each item of uniform. Please note that the figures for shirts/blouses, skirts/kilts and dresses/pinafores are based on female children only, while those for shirts and shorts are based on male children only.

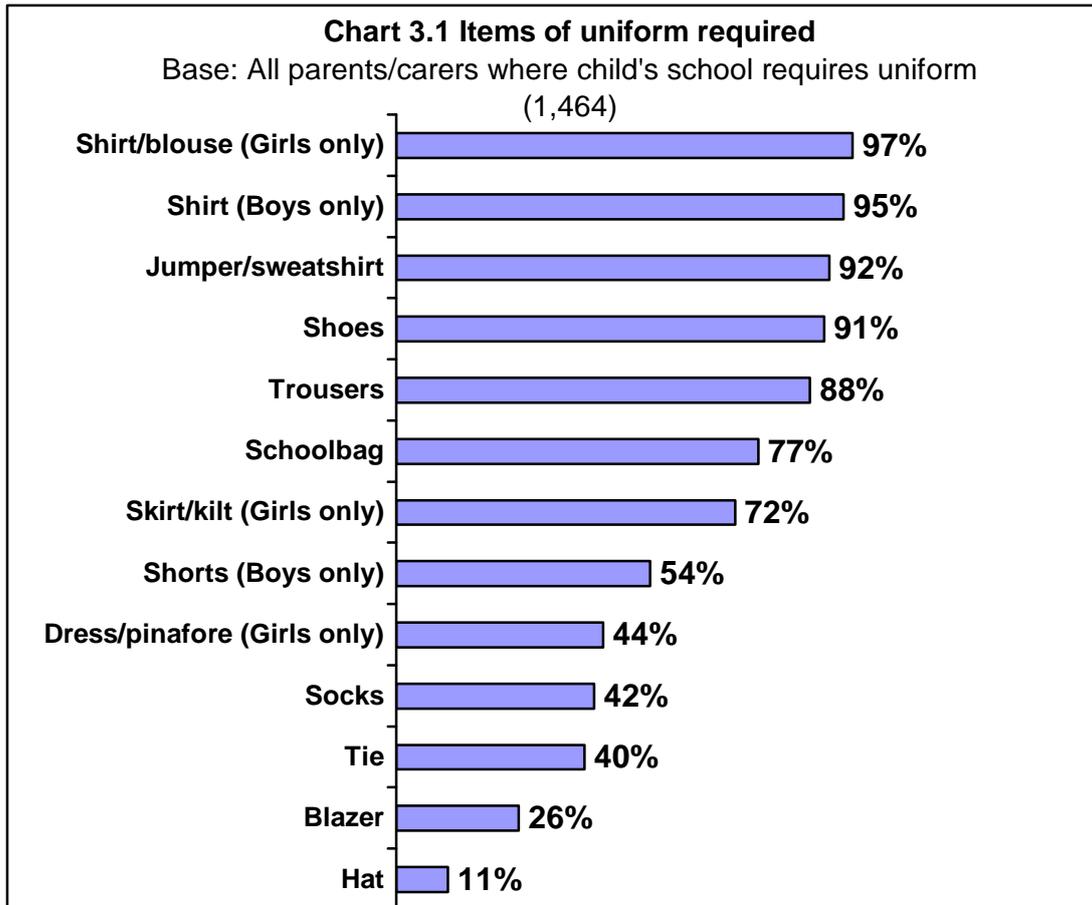


Chart 3.1 shows that a number of items were needed by almost every child requiring a school uniform.

The requirements varied between primary and secondary schools. Parents/carers whose child was at primary school were more likely than those at secondary school to specify a jumper or sweatshirt (98 per cent compared with 85 per cent), a skirt or kilt (83 per cent compared with 58 per cent, based on female children only), a dress or pinafore (71 per cent compared with 6 per cent, again based on female children only), shorts (62 per cent compared with 43 per cent, based on male children only) and a hat (17 per cent compared with 2 per cent). By contrast, secondary school parents/carers were more likely than primary school parents/carers to specify a tie (65 per cent compared with 22 per cent) and a blazer (53 per cent compared with 7 per cent).

The figures are very similar to those obtained in the 2003 survey, although a smaller proportion said that a tie was needed in the 2007 survey (47 per cent compared with 40 per cent in 2003). Note that socks were included as an item in 2007 but not in 2003.

Schools survey – Which items of uniform are required?

Schools were also asked to record the items of school uniform clothing that were required or optional. A slightly different list was used for the schools questionnaire, enabling items such as a specific type of coat and scarf to be included (where time constraints meant they could not be part of the parents/carers questionnaire). An “other” option was also included.

The tables below show which items were included in the school uniform and whether each item was required or optional, for both primary and secondary schools.

Table 3.1 : Items of uniform required – Primary Schools
Base = All Primary schools requiring uniform (n=145)

	Required %	Optional %	Total %
Sweatshirt/jumper/cardigan	72	28	100
Blouse/shirt	56	30	86
Trousers/skirt	63	26	89
Dress/pinafore (Girls only)	28	48	76
Shorts (Boys only)	31	30	61
Blazer	1	3	4
Tie	10	10	20
Specific type of shoes	19	8	27
Specific type of coat	2	12	14
Bag	13	40	53
Specific type of socks	3	7	10
Cap/Hat	2	17	19
Specific scarf	-	1	1
Other	3	1	4

Table 3.2 : Items of uniform required – Secondary Schools
Base = All Secondary schools requiring uniform (n=61)

	Required %	Optional %	Total %
Sweatshirt/jumper/cardigan	70	25	95
Blouse/shirt	92	-	92
Trousers/skirt	97	2	99
Dress/pinafore (Girls only)	5	7	12
Shorts (Boys only)	23	7	30
Blazer	46	2	48
Tie	52	-	52
Specific type of shoes	49	-	49
Specific type of coat	12	5	17
Bag	35	12	37
Specific type of socks	14	2	16
Cap/Hat	-	2	2
Specific scarf	-	3	3
Other	13	2	15

There were differences between secondary and primary schools in terms of the items required for uniform and the pattern was similar to the findings from the parents/carers survey. Primary schools were more likely to include a dress or pinafore, a pair of shorts or a cap/hat in their uniform. Secondary schools were more likely to include trousers or skirt, a blazer, a specific type of shoes and a tie.

Primary schools were more likely than secondary schools to say an item of uniform was optional rather than required of children.

These figures were very similar to the 2003 findings. However, fewer secondary schools in 2007 said a tie was required or optional (52 per cent compared with 79 per cent in 2003). This was also the same for a specific type of socks (16 per cent compared with 31 per cent in 2003).

Parents/carers survey - Use of school logo on uniform

Table 3.3 shows the number of items that required a logo, and (if not required) where a logo was optional.

Table 3.3: Number of items requiring logo and that could have an optional logo, by school type				
Base: All parents/carers requiring at least one item of uniform (1,464)				
	Logo required		Optional logo	
	Primary (n = 840) %	Secondary (n = 624) %	Primary (n = 840) %	Secondary (n = 624) %
None	20	3	44	79
One	38	36	24	11
Two	29	40	19	3
Three	8	13	6	1
Four	3	5	3	1
Five or more	2	3	2	1
Don't know	*	*	3	4

Most parents/carers said that at least one item of uniform required a logo. The proportion was higher in secondary schools than in primary schools (97 per cent compared with 80 per cent). Optional logos were more common in primary schools. Within primary schools, there was also a difference between girls and boys: 75 per cent of parents/carers with a female child at primary school said that a logo was required on at least one item, compared with 85 per cent of parents/carers with a male child at primary school.

If the figures for required and optional logos are combined, all but 3 per cent of parents/carers said that their child's uniform had at least one item which needed a logo or had an optional logo.

Schools survey - Use of school logo on uniform

Schools were asked to record which uniform items required the school logo and which items could have an optional school logo. This was asked for items of uniform that were either required or optional. Table 3.4 shows the items requiring a school logo / where a logo was optional.

The main items that required a logo or where a logo was optional were: sweatshirt/jumper/ cardigan (88 per cent); blazer, and school tie (both 75 per cent). Small base numbers (especially amongst secondary schools) prevent analysis by school type.

Table 3.4: Uniform items requiring logo / could have an optional logo

Base: All schools requiring children to wear each item of uniform (bases are shown for each individual item of uniform)

	Logo required %	Optional logo %
Sweatshirt/jumper/cardigan (n=203)	47	41
Blouse/shirt (n=180)	10	31
Trousers/skirt (n=188)	2	9
Dress/pinafore (Girls only) (n=117)	2	14
Shorts (Boys only) (n=106)	1	5
Blazer (n=33)	67	8
Tie (n=60)	33	42
Specific type of shoes (n=68)	-	6
Specific type of coat (n=30)	17	23
Bag (n=104)	16	25
Specific type of socks (n=24)	-	-
Cap/Hat (n=29)	17	41
Specific scarf (n=3)	100	-
Other (n=14)	49	34

Schools were also asked if parents/carers could sew school logo badges onto uniform items that had been bought from non-specialist shops. Almost half (47 per cent) said parents/carers were not permitted to do this and there was no difference between primary and secondary schools.

School logos were not covered in the 2003 schools questionnaire.

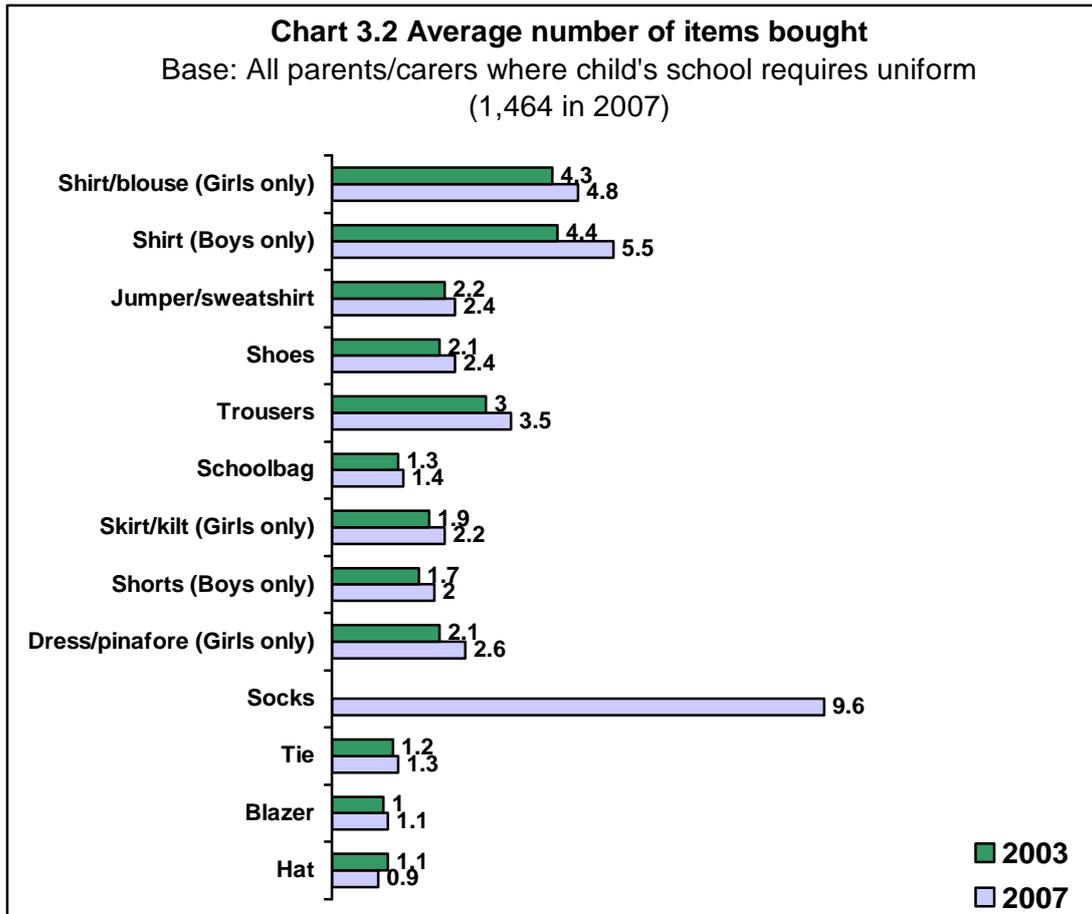
Parents/carers survey - Cost of each item of uniform

Once the make-up of the school uniform required for their children had been established, parents/carers were then asked how many of each item they bought in 2007 and the typical cost of each type of clothing¹³. A random sub-sample of parents/carers were asked about each individual item since time constraints meant that all respondents could not be asked about every item required. Interviewers were instructed to probe for the price of a single item only. For example if the price of a pack of three shirts was given, the cost recorded was calculated on the price of a single item (i.e. divided by 3).

Chart 3.2 shows the average number of each item bought in a year. Figures from 2003 are included as a comparison.¹⁴

¹³ This approach to obtaining costs relies on respondent recall over a 12 month period. Therefore some degree of caution must be used when assessing the results – recall will not always be totally accurate. Diaries would have offered a more accurate reflection of costs but the time constraints of the project meant that this was not a viable option. Please refer to the technical appendix for a more detailed discussion of methodology.

¹⁴ 2003 costs have been multiplied by 1.1395 to adjust for inflation between 2003 and 2007



Parents/carers tended to say they had bought more of the following items in 2007 than was the case in 2003: shirts and shirts/blouses, trousers and dresses/pinafores (these differences were statistically significant). Aside from these, the numbers are very similar between the two surveys. Analysis of the 2007 data indicates that the average number of items bought per year was slightly higher for primary schoolchildren than those at secondary school (for example, 2.7 compared with 1.9 for jumpers/sweatshirts and 3.8 compared with 3.0 for trousers).

Chart 3.3 shows the average costs for each item (single item) of uniform, again for both 2003 and 2007. In this chart, as in the rest of the report, 2003 figures have been adjusted for inflation using the RPI. This allows a more direct comparison between surveys.

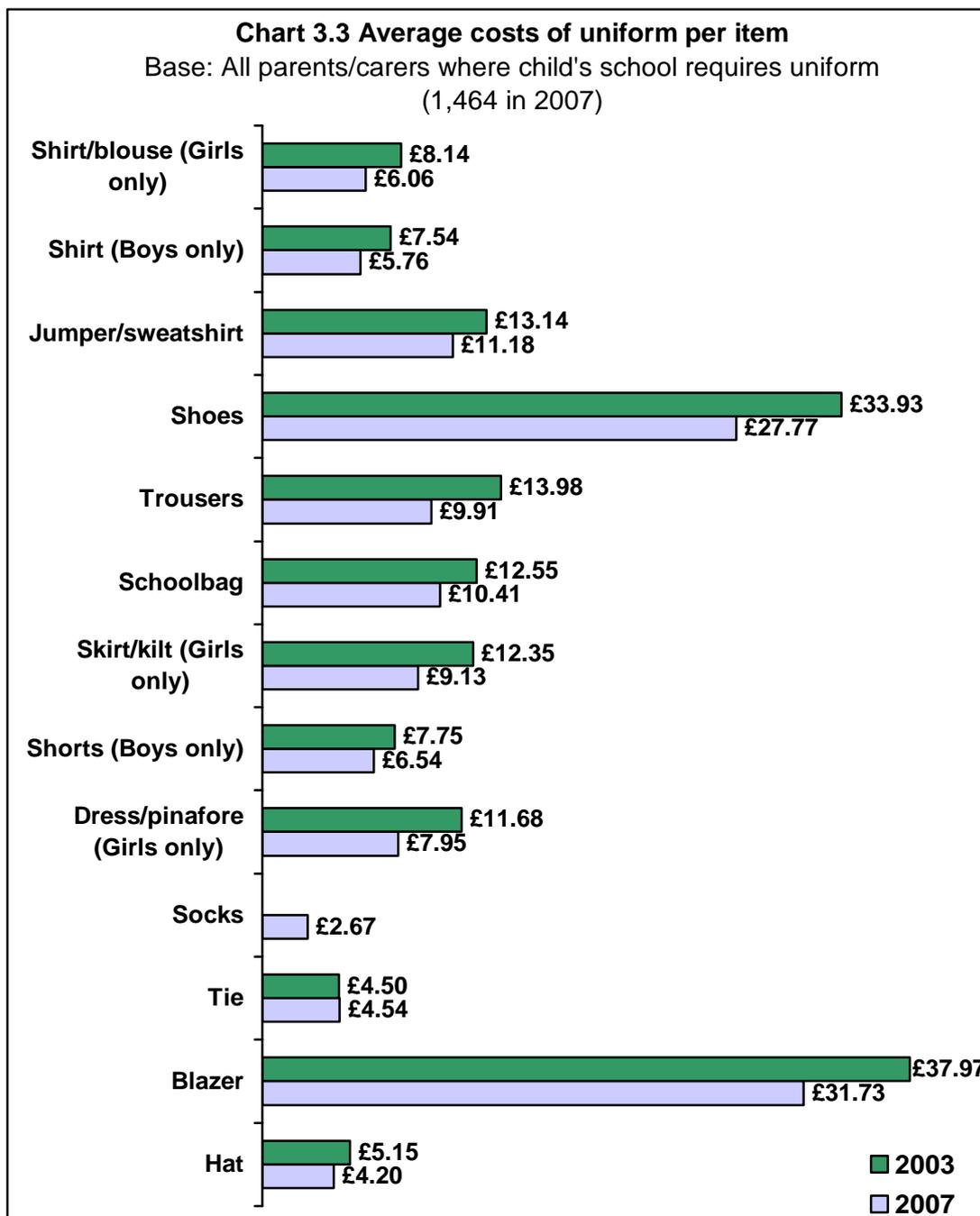


Chart 3.3 shows that, once the 2003 costs have been adjusted for inflation, the average cost of most items of uniform had decreased over the previous four years. The level of change was similar in primary and secondary schools.

Chart 3.4 breaks down the average cost of the various items of uniform for primary and secondary schoolchildren. Items were only included in the chart if at least 50 parents/carers of primary schoolchildren and at least 50 parents/carers of secondary schoolchildren said their child required that item of uniform.

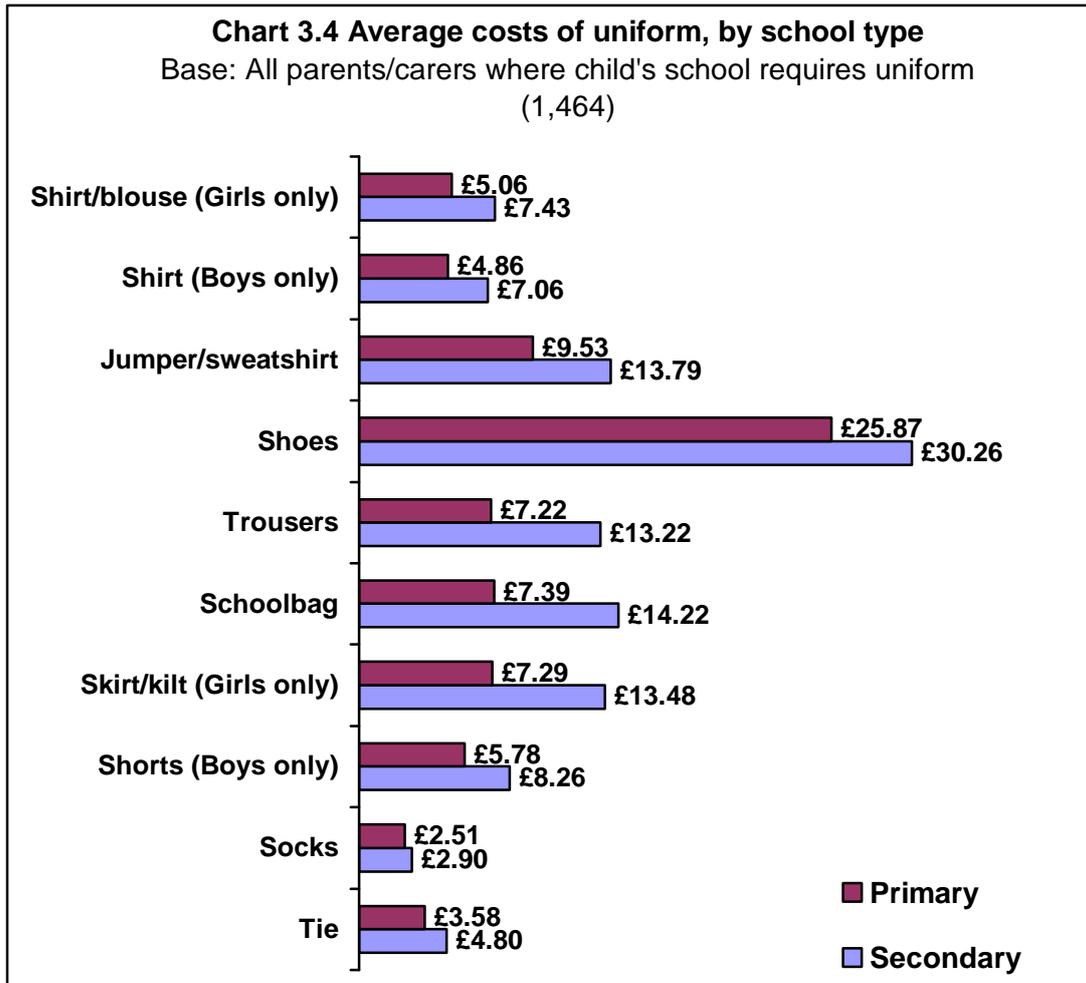


Chart 3.4 shows that the various items were consistently more expensive for parents/carers of secondary schoolchildren than for those with children at primary school. The difference was greatest for trousers, schoolbags and skirts/kilts. The difference in the cost of shoes is the result of a higher cost specifically for boys at secondary school (£34.93 compared with £26.38 for boys at primary school); there was no difference between the cost of girls' shoes at primary and secondary schools.

It is also possible to analyse costs in relation to where uniform could be bought (examined in section 3.3). Table 3.5 shows the average cost of items, broken down by whether all items could be bought anywhere; whether some items had to be bought from the school or a designated shop; or whether all items had to be bought from the school or a designated shop. Again, items are only included which had a base size of 50 respondents or more for all of the sub-group categories.

Table 3.5: Average cost of uniform, by buying restrictions

Base: All parents/carers where child's school requires each item of uniform (bases shown for each individual item of uniform)

	All can be bought anywhere	Some items have to be bought from school/designated shop	All items have to be bought from school/designated shop
Shirt (Boys only) (n = 448)	£4.77	£5.68	£7.66
Shirt/blouse (Girls only) (n = 449)	£4.84	£6.24	£7.16
Trousers (n = 804)	£8.03	£9.98	£12.06
Jumper/sweatshirt (n = 876)	£9.45	£11.37	£12.96
Shoes (n = 829)	£26.16	£28.09	£28.83
Bags (n = 626)	£7.89	£10.25	£13.44

The table shows that items tended to be cheaper when they could be bought anywhere. However, as shown below in section 3.3, it was mainly primary school uniform that could be bought anywhere and, as seen above in chart 3.5, primary school uniform was generally cheaper than secondary school uniform. This means that uniform that could be bought anywhere is likely to be cheaper just because it is more likely to be for primary school. If the costs are analysed separately for primary and secondary schools, shirts, shirts/blouses and jumpers/sweatshirts remain cheaper when they can be bought anywhere (although the difference is reduced), while the costs of trousers, shoes and bags are similar across the different categories.

Schools survey - Cost of each item of uniform

Schools were also asked to give prices for each item included in their school uniform.

As mentioned in the last section, as a result of time and spatial constraints with the two questionnaires and in the interests of examining as many different costs as possible, the list of items of uniform differed slightly between the parents/carers questionnaire and the schools questionnaire.

Shirts/blouses and trousers/skirts were combined as a single item in the Schools questionnaire. The schools questionnaire also included a space for schools to insert

“other” answers. Parents/carers were not asked if they were required to purchase specific coats or scarves.

Table 3.6 shows the average price given by schools for each item and includes, where applicable, a comparison with the average price calculated from parents/carers.

Table 3.6 : Average cost of item of uniform - Schools & Parents/carers comparison

Base = All schools where item required and asked to provide cost for that item / All parents/carers where child's school requires item and asked to provide cost for that item (variable)

	Ave Price (Schools)	Ave Price (Parents)	Per cent difference
	£	£	%
Sweatshirt/jumper/cardigan (Schools: n=203, Parents/carers: n=813)	9.58	11.18	Parents: 17% higher
Blouse (Girls only) (Schools: n=180, Parents/carers: n=449)	6.02 ¹⁵	6.06	Parents: 1% higher
Shirt (Boys only) (Schools: n=180, Parents/carers: n=448)	6.02	5.76	Schools: 5% higher
Trousers (Schools: n=188, Parents/carers: n=803)	8.61 ¹⁶	9.91	Parents: 15% higher
Skirt (Girls only) (Schools: n=188, Parents/carers: n=263)	8.61	9.13	Parents: 6% higher
Dress/pinafore (Girls only) (Schools: n=117, Parents/carers: n=169)	8.41	7.95	Schools: 6% higher
Shorts (Boys only) (Schools: n=106, Parents/carers: n=221)	4.45	6.54	Parents: 47% higher
Blazer (Schools: n=33, Parents/carers: n=186)	26.08	31.73	Parents: 22% higher
Tie (Schools: n=60, Parents/carers: n=252)	3.56	4.54	Parents: 28% higher
Specific type of shoes (Schools: n=68) (Parents/carers: n=827)	15.65	27.77	Parents: 77% higher
Specific type of coat (Schools: n =30, Parents/carers: n=N/A)	15.21	N/A ¹⁷	-
Bag (Schools: n =104, Parents/carers: n=623)	4.73	10.41	Parents: 121% higher
Specific type of socks (Schools: n =24, Parents/carers: n=303)	1.51	2.67	Parents: 77% higher
Cap/Hat (Schools: n =29, Parents/carers: n=57)	2.89	4.20	Parents: 45% higher
Specific scarf (Schools: n =3)	5.32	N/A ⁸	-

¹⁵ In the Schools questionnaire, shirts/blouses were combined as a single item - the average cost for both items combined is used for comparative purposes

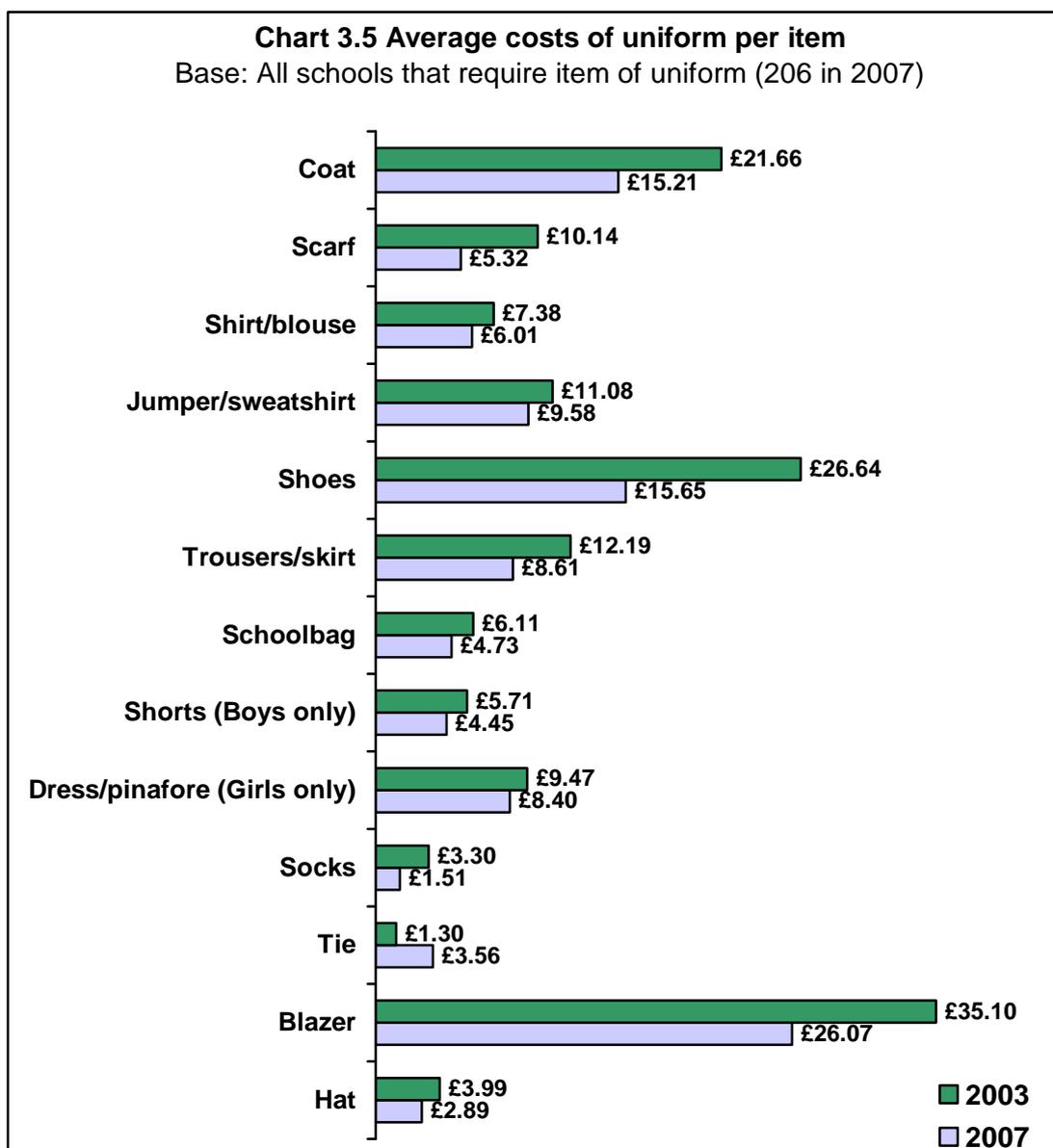
¹⁶ In the Schools questionnaire, trousers/skirt were combined as a single item - the average cost for both items combined is used for comparative purposes

¹⁷ Parents/carers were not asked whether they were required to purchase specific coats or scarves.

In almost every case where there was a direct comparison between the parents/carers and schools data, the parents' estimates of costs were higher than the schools'. For some items, such as school bag, school tie and blazer the percentage difference was considerable. This study is not able to provide evidence to suggest why the difference existed.

Chart 3.5 compares average costs provided by schools for each item in 2003 and 2007.

The chart shows a similar pattern evident with parents/carers. After 2003 costs have been adjusted for inflation, the average cost provided by schools for each item (apart from ties) has decreased over the past four years.



Parents/carers survey - Average annual cost of uniform items

By taking the price for each item of uniform (based on the parents/carers survey) and multiplying by the number of items bought in the previous year, the annual cost to parents/carers for school uniform items was calculated. This “average cost in 2007” applies only to parents/carers who needed each item; “total costs” are discussed in the next section.

Details are shown in Table 3.7. Please note that the average cost for each item in 2007 has been calculated by multiplying the cost of an item by the number bought for each respondent where the item was needed. An average cost was then calculated for each item based on individual responses to both questions. Therefore the average cost is not simply obtained by multiplying the average cost of each item by the average number bought.

Table 3.7: Average spend in 2007 on uniform items

Base: All parents/carers where child's school requires uniform

	% needing item (n = 1,464)	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shoes	91	27.77	2.4	64.00 (n = 832)
Blazer	26	31.73	1.1	33.33 (n = 216)
Trousers	88	9.91	3.5	32.42 (n = 825)
Shirt (Boys only)	95	5.76	5.5	28.38 (n = 453)
Blouse/shirt (Girls only)	97	6.06	4.8	27.33 (n = 458)
Jumper/sweatshirt	92	11.18	2.4	25.44 (n = 861)
Socks	42	2.67	9.6	23.50 (n = 323)
Skirt/kilt (Girls only)	72	9.13	2.2	19.36 (n = 291)
Dress/pinafore (Girls only)	44	7.95	2.6	19.15 (n = 181)
Schoolbag	77	10.41	1.4	14.77 (n = 679)
Shorts (Boys only)	54	6.54	2.0	12.67 (n = 248)
Tie	40	4.54	1.3	5.72 (n = 311)
Hat	11	4.20	0.9	3.97 (n = 79)

Where items were required, the average annual cost was highest for shoes (£64.00), followed by blazers (£33.33) and trousers (£32.42). Reflecting the findings above on the average cost per item, these annual costs were lower than in 2003 after adjusting for inflation. The largest decrease was for trousers (from £40.22 in 2003 to £32.42 in 2007).

Average annual costs tended to be higher for secondary schoolchildren than primary schoolchildren, specifically for trousers (£40.28 compared with £26.16), shoes (£67.64 compared with £61.23) and school bags (£22.12 compared with £9.29).

These differences reflect a higher cost per item for secondary schoolchildren, rather than more items being needed. In fact, in the case of trousers, more items were needed for primary schoolchildren than secondary schoolchildren.

More detailed figures are included in the Appendices (Appendix F) for primary male children, secondary male children, primary female children and secondary female children. In addition to the overall differences noted above for primary and secondary schools, this analysis also shows that:

- The average annual cost of trousers was higher for boys than girls, and this was because of a difference at primary schools (£29.56 for boys, £20.62 for girls); this was due to a greater number being bought for primary school boys than primary school girls (4.4 compared with 2.7).
- The average annual cost of shoes was higher for secondary school boys than secondary school girls (£72.59 compared with £62.79), due to a higher average cost per item (£34.93 for boys, £25.67 for girls).

Parents/carers survey - Total uniform costs

This section examines the total cost of school uniform in 2007. Unlike previous analysis, this is based on all parents/carers requiring uniform, rather than just those needing the specific item; it therefore shows the overall average costs per child.

Table 3.8 provides a banded breakdown of total school uniform costs for both primary and secondary schools (2003 percentages are shown in brackets). Total costs were more likely to be higher for parents/carers with children in secondary school compared with parents/carers of primary schoolchildren. There were no differences based on household income.

Table 3.8: Total cost of all school uniform items in 2007 (2003 percentages in brackets)

Base: All parents/carers where child's school requires uniform (1,464)

	Total (n = 1,464) %	Primary (n = 840) %	Secondary (n = 624) %
Less than £100	11 (11)	14 (17)	6 (4)
£100 - £149	22 (25)	29 (35)	13 (15)
£150 - £199	31 (29)	33 (28)	28 (31)
£200 - £249	20 (19)	16 (12)	26 (26)
£250 - £299	9 (9)	5 (5)	15 (14)
£300+	7 (7)	3 (3)	12 (11)

Table 3.9 shows the average total cost of school uniform in 2007, adding together all of the various items of uniform. The corresponding figures from 2003 are also shown.¹⁸ Note that socks were included in the uniform items in 2007 but not in 2003; as the average cost of socks per child was around £10, the 2007 costs were lower than 2003 costs on a like-for-like basis.

¹⁸ 2003 costs have been adjusted for inflation between 2003 and 2007

Table 3.9: Total cost of school uniform in 2007, by gender and school type

Base: All parents/carers where child's school requires uniform (2007 bases shown for each sub group in brackets)

	Total cost 2003	Total cost 2007
All parents/carers (n = 1,464)	£179.47	£184.17
Gender/school type:		
Primary school – boys (n = 427)	£150.44	£163.50
Secondary school – boys (n = 319)	£218.01	£219.57
Primary school – girls (n = 413)	£157.57	£163.95
Secondary school – girls (n = 305)	£199.79	£203.21

On average, the total cost of school uniform (when required) in 2007 was £184.17 – the total cost in 2003 was £179.47. The total cost was higher in secondary schools than in primary schools, and this applied in particular to boys at secondary school. The overall difference between secondary and primary schools can be attributed to the higher cost (per item) of items such as trousers, shoes and school bags. In addition, one of the most expensive items (blazers) was required in secondary schools much more than in primary schools. By contrast, the items that were needed more often in primary schools than in secondary schools (such as hats, dresses, skirts and shorts) tended to be relatively inexpensive.

The difference between boys and girls at secondary schools is the result of higher spending on shoes.

The differences in the average total cost of school uniform seen between school type and gender were also evident in 2003. The reasons behind the differences were the same as above.

Table 3.10 shows total costs, analysed by whether used uniform was available to parents/carers (to buy or free of charge)¹⁹, and according to whether uniform had to be bought from a designated shop or the school itself. Costs have been split by

¹⁹ Because of the small numbers of respondents, it has not been possible to break down the analysis further into whether used uniform was available to buy compared with whether it was available free of charge.

primary and secondary schools; this is important, because both of these features (used uniform available from the school and allowing uniform to be bought anywhere) were more common in primary schools than in secondary schools, where uniform was generally cheaper.

Table 3.10: Total cost of school uniform in 2007, by where uniform is available
Base: All parents/carers where child's school requires uniform (individual bases shown in each cell)

	Total cost: primary schools	Total cost: secondary schools
All parents/carers	£163.72 (n = 840)	£211.60 (n = 624)
<i>Whether used uniform available from school:</i>		
Can be acquired second hand or free of charge	£156.87 (n = 356)	£198.27 (n = 146)
These options not available	£170.08 (n = 417)	£219.54 (n = 372)
<i>Whether has to be bought from designated shop or school:</i>		
All items from designated shop or school	£173.04 (n = 75)	£212.76 (n = 171)
Some items from designated shop or school, others from anywhere	£166.54 (n = 501)	£211.67 (n = 394)
All items can be bought from anywhere	£155.29 (n = 263)	£205.67 (n = 57)

The table shows that the total cost of uniform was lower when used uniform was available from the school (either to buy or free of charge), in both primary and secondary schools. In primary schools, the total cost was also lower where all items could be bought anywhere (rather than from a designated shop or the school itself), but there was no difference in secondary schools.

Further analysis showed that there were no differences by school year (over and above the broad difference between primary and secondary schools), and that costs did not vary by social grade or household income.

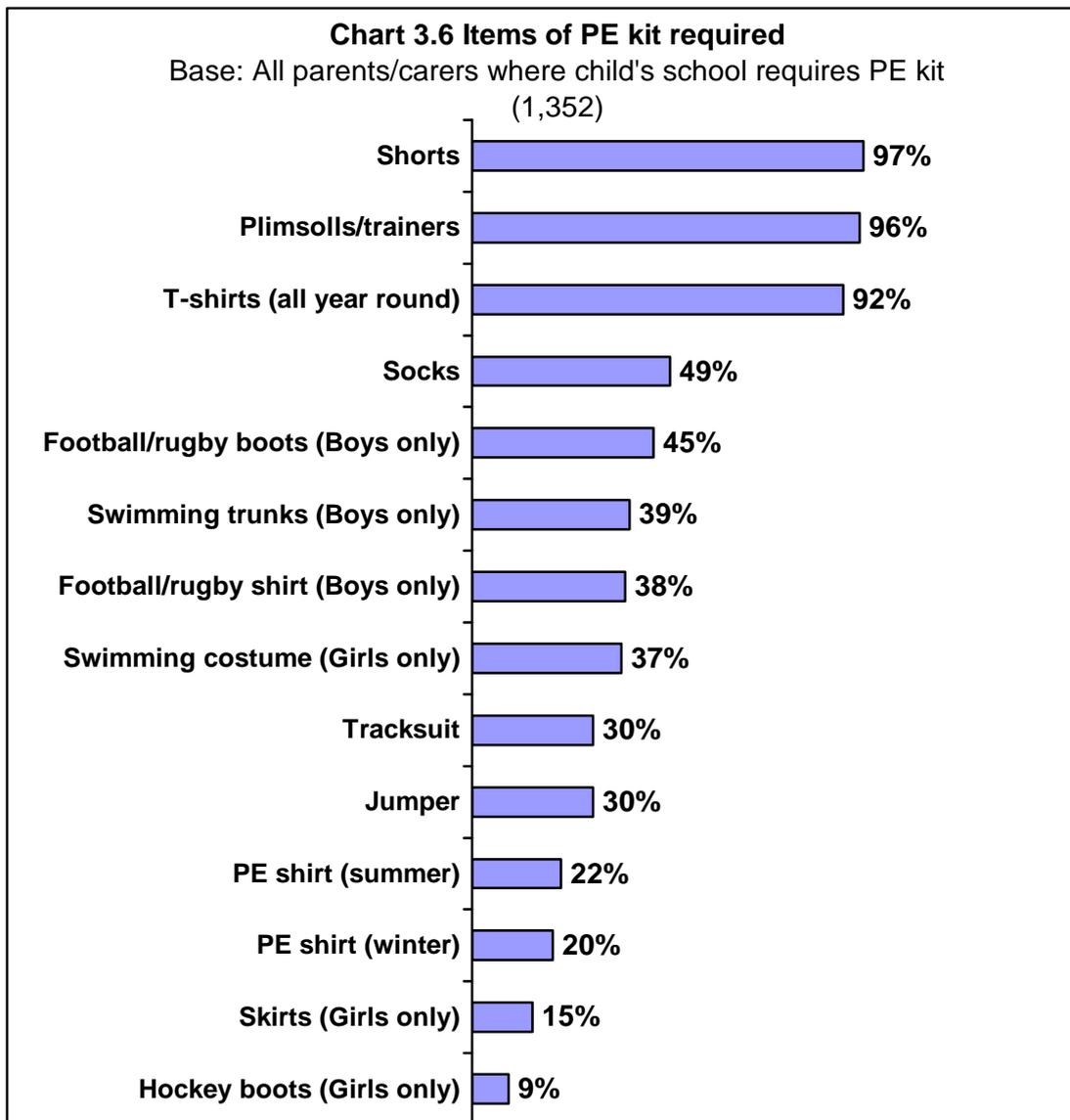
3.2 PE kit

Parents/carers were asked whether their child required a PE kit for school. Nine out of ten parents/carers (90 per cent) said their child did need some form of PE kit for school.

There were slight differences between primary and secondary schoolchildren, with 87 per cent of parents/carers with primary schoolchildren saying their child's school required children to have a PE kit, compared with 95 per cent of parents/carers with children at secondary school. This probably reflects the different nature of PE lessons at secondary schools, with more organised, team orientated sports being played which require appropriate equipment.

Parents/carers survey - Items required for PE kit

Parents/carers who needed to buy their child a PE kit were then asked which items the kit consisted of. As with the uniform section, a list of potential items of PE kit was read out, tailored according to the gender of the child. Chart 3.6 shows each item of PE kit and the percentage of parents/carers who said the item was included in their child's PE kit. Again, as with the uniform section, some items are based on parents/carers of female children only (skirts, hockey boots and swimming costume) and others based on parents/carers of male children only (football/rugby shirts and boots, and swimming trunks).



There were differences between primary and secondary schools in terms of the make-up of PE kits, as shown in Table 3.11.

Table 3.11: Items of PE kit required, by school type

Base: All parents/carers where child's school requires PE kit (1,352)

	Total (n =1,352) %	Primary (n = 753) %	Secondary (n = 599) %
Shorts	97	98	96
Plimsolls/trainers	96	97	94
T-shirts (all year round)	92	96	86
Socks	49	23	82
Football/rugby boots (Boys only)	45	16	80
Swimming trunks (Boys only)	39	44	33
Football/rugby shirts (Boys only)	38	6	78
Swimming costume (Girls only)	37	44	29
Full tracksuit	30	32	27
Jumper/tracksuit top	30	24	37
PE shirt (summer)	22	14	32
PE shirts (winter)	20	13	30
Skirts (Girls only)	15	6	27
Hockey boots (Girls only)	9	1	18

Children at secondary school were much more likely to need more specialist items in their PE kit than their primary school counterparts. Items such as seasonal clothing (winter PE shirt and summer PE shirt), skirts, football/rugby shirts and football/rugby or hockey boots were all much more likely to be included in a typical secondary school PE kit compared to primary school. Specifically, summer PE shirts and socks were more common amongst *boys* at secondary school, and jumpers/tracksuit tops amongst *girls* at secondary school.

T-shirts (used all the year round), swimming trunks and swimming costume were more likely to be needed at primary schools.

The overall requirements for PE kit, as well as differences between primary and secondary schools, were very similar in the 2003 survey.

Schools survey - Items required for PE kit

Schools were also asked if children were required to have a PE kit. All secondary schools and 87 per cent of primary schools said they had a PE kit of some description.

Schools were asked to record the items of PE kit that were required or optional.

A slightly different list was used for the schools questionnaire, enabling items such as jogging bottoms to be included (time constraints meant they could not be part of the parents/carers questionnaire).

The table below shows which items were included in the school PE kit and which were required or optional. Data for primary schools is shown first.

Table 3.12: Items of PE Kit required – Primary Schools			
Base = All Primary Schools requiring PE kit (128)			
	Total %	Required %	Optional %
Shorts	97	87	10
T-shirt	97	88	9
Full tracksuit	22	2	20
Jogging bottoms	41	9	32
Tracksuit top	41	11	30
Trainers or plimsolls	89	83	6
Football/rugby shirt (Boys only)	11	5	6
Netball skirt (Girls only)	13	3	10
Swimming costume	64	61	3
Football/rugby/hockey boots	19	9	10
Other	3	2	1

Table 3.13: Items of PE Kit required – Secondary Schools
Base = All Secondary Schools requiring PE kit (61)

	Total %	Required %	Optional %
Shorts	95	88	7
T-shirt	88	85	3
Full tracksuit	40	3	37
Jogging bottoms	63	15	48
Tracksuit top	62	15	47
Trainers or plimsolls	93	90	3
Football/rugby shirt (Boys only)	70	63	7
Netball skirt (Girls only)	37	25	12
Swimming costume	33	26	7
Football/rugby/hockey boots	80	53	27
Other	2	-	2

As with school uniform, secondary schools were more likely than their primary counterparts to say items of PE kit were required. However, primary schools were more likely to require swimming costumes (61 per cent compared with 26 per cent), which is likely to be a result of the National Curriculum requirement for Key Stage 2 children to have swimming lessons.

These figures were very similar to the 2003 findings and there were no differences between the two years when looking at all schools combined.

Parents/carers survey - Use of school logo on PE kit

Table 3.14 shows the number of items that required a logo, and where (if not required) a logo was optional.

Table 3.14: Number of items requiring logo and that could have an optional logo, by school type

Base: All parents/carers where child's school requires PE kit (1,352)

	Logo required		Optional logo	
	Primary (n = 751) %	Secondary (n = 598) %	Primary (n = 751) %	Secondary (n = 598) %
None	62	27	60	73
One	29	25	24	13
Two	6	27	7	4
Three	1	11	3	2
Four	*	5	2	1
Five or more	1	5	2	1
Don't know	1	*	3	5

In schools where PE kit was required, most parents/carers of secondary schoolchildren said that at least one item required a logo (73 per cent), but this was much lower for primary schoolchildren (37 per cent). In general, PE kit was less likely than school uniform to need a logo (see Table 3.3 for uniform details).

If the figures for required and optional logos are combined, 72 per cent of parents/carers said that their child's PE kit needed a logo or had an optional logo on at least one item of clothing (81 per cent in secondary schools and 64 per cent in primary schools). There were no differences by the gender of the child.

Parents/carers who said that any items of uniform or PE kit needed a logo, or where a logo was optional, were asked whether they were allowed to sew the logo on themselves. Most parents/carers said that all items had to be bought with the logo (79 per cent). Secondary school parents/carers were more likely than primary school parents/carers to say that they could sew logos on all items (10 per cent compared with 5 per cent) or on some of the items (20 per cent compared with 4 per cent).

Schools survey - Use of school logo on PE kit

Schools were also asked to record the specific PE kit items that required a school logo / where a logo was optional. Schools were asked this for each item of PE kit that was required or optional.

Table 3.15 shows items requiring a school logo / where a logo was optional.

Almost half of schools said a logo was required / optional on football/rugby shirts (48 per cent) and this was similar for t-shirts (47 per cent). However, as with the parents/carers survey, logos were less likely to be required on PE kit compared with school uniform items (see Table 3.4 for uniform details). Small base numbers prevent analysis by school type.

Table 3.15: PE kit items requiring logo / could have an optional logo

Base: All schools requiring children to wear each item of PE kit or PE kit item optional (variable)

	Logo required %	Optional logo %
Shorts (n=182)	4	9
T-shirt (n=177)	22	25
Full tracksuit (n=52)	17	11
Jogging bottoms (n=90)	7	3
Tracksuit top (n=89)	16	5
Trainers or plimsolls (n=171)	1	2
Football/rugby shirt (Boys only) (n=56)	38	10
Netball skirt (Girls only) (n=40)	9	5
Swimming costume (n=102)	-	2
Football/rugby/hockey boots (n=72)	-	1

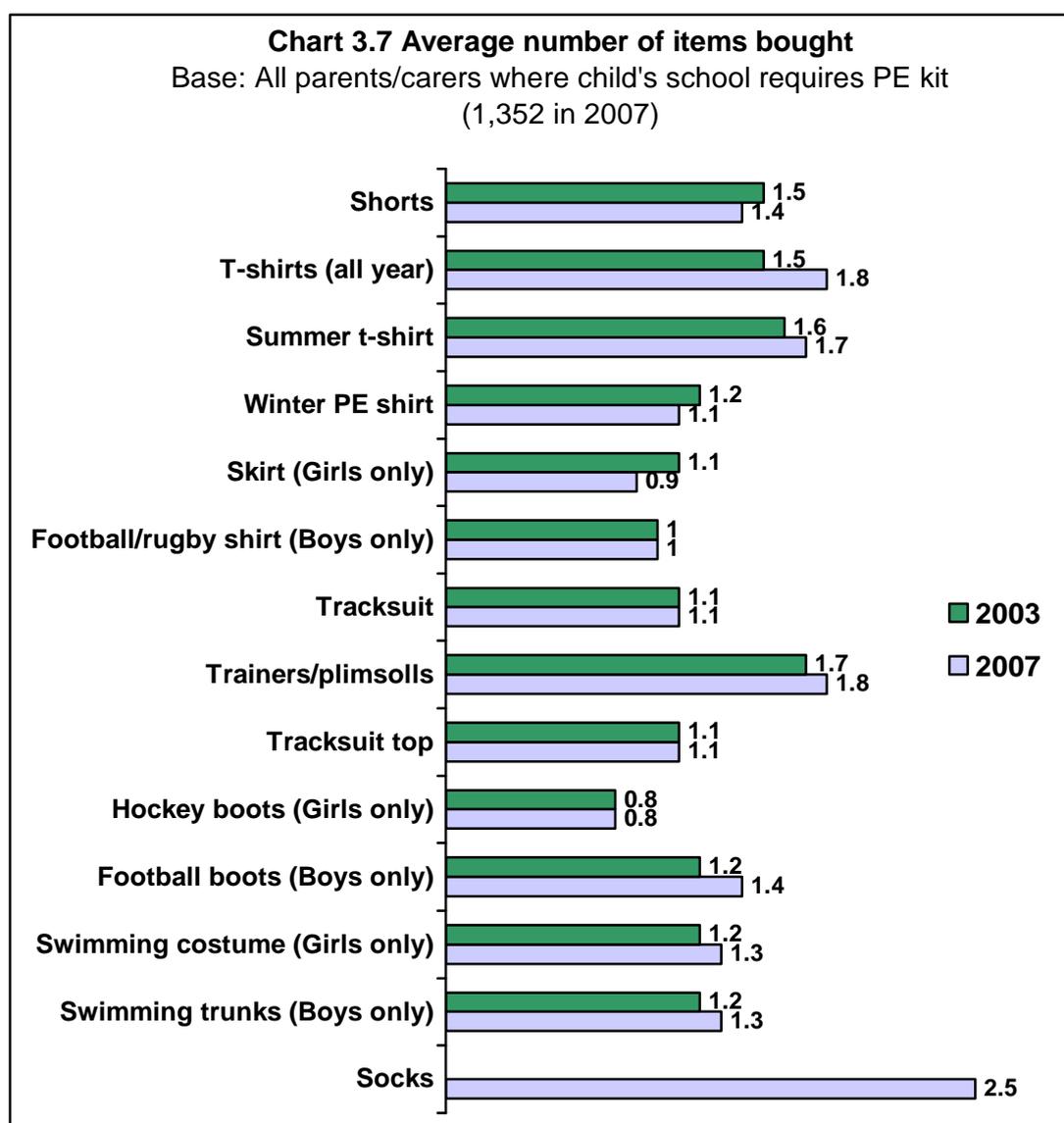
Schools that required children to have a PE kit were asked if parents/carers could sew any school logos onto uniform items that had been bought from non-specialist shops. Forty six per cent said parents/carers were not permitted to do this, which is similar to the proportion of schools who did not permit school logos to be sewed onto school uniform items.

Secondary schools were more likely than primary schools to say that it was not permitted (61 per cent compared with 39 per cent).

Parents/carers survey - Cost of each item of PE kit

Parents/carers were also asked how many of each item of PE kit they bought in 2007 and the typical cost of each type of clothing or equipment. As with the uniform section, a random sample of parents/carers were asked about each item of PE kit, due to time constraints. Each parent/carer was asked about a maximum of four items at random (if they had said their child required more than four items of kit).

Chart 3.7 shows the average number of each item bought in a year. Figures from 2003 are included as a comparison.



As chart 3.7 shows, the number of items bought per year remained very similar between the two years. The number of items bought in 2007 were also very similar in primary and secondary schools (where the item was required), the exceptions being

tracksuit tops (an average of 1.3 were bought in 2007 in primary schools, compared with 0.9 per year in secondary schools) and socks (3.4 and 2.2 respectively).

Chart 3.8 shows the average costs for each item (single item) of PE kit, again for both 2003 and 2007.

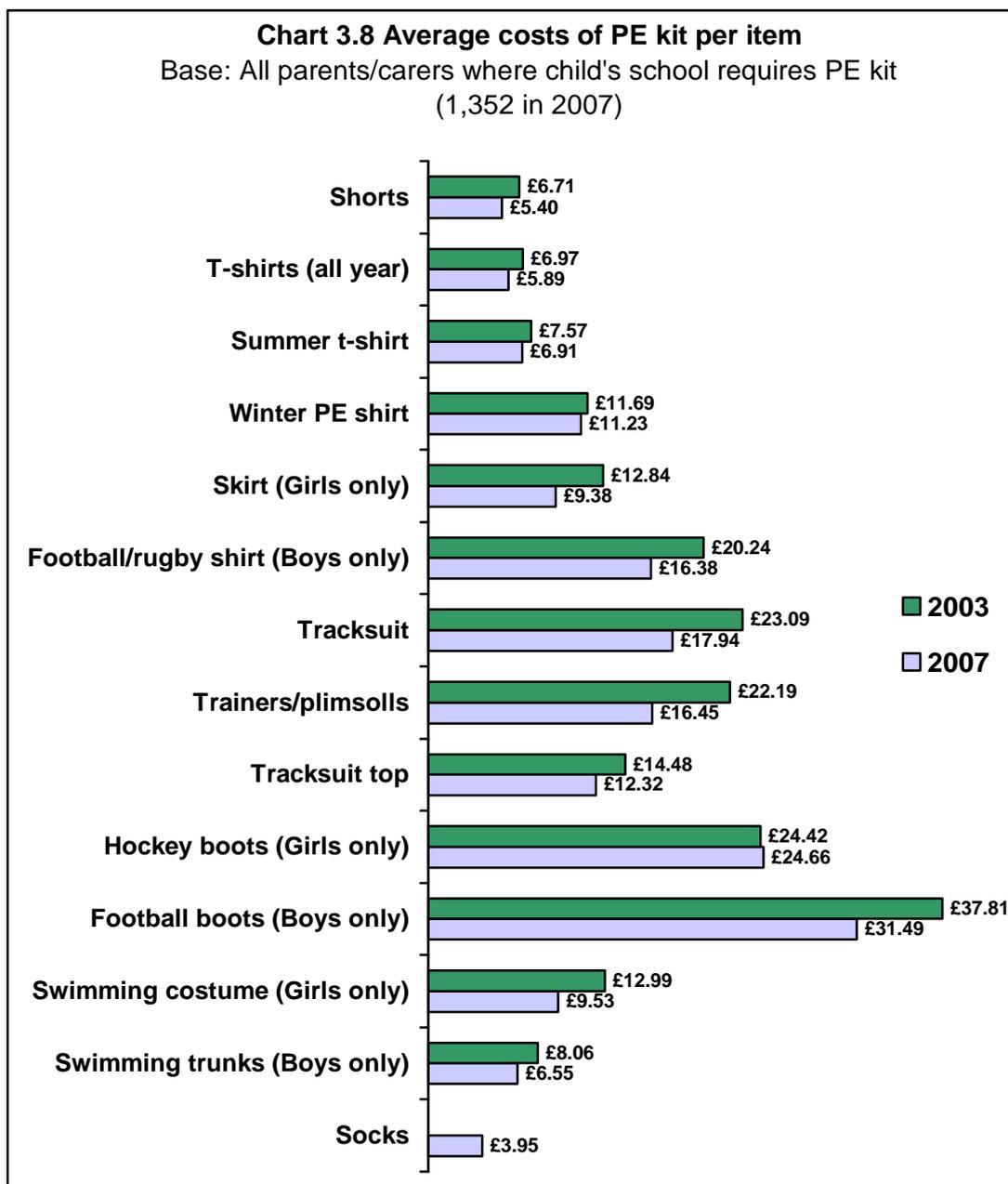


Chart 3.8 shows that, once the 2003 costs have been adjusted for inflation, the average cost of a number of items of PE kit had decreased over the previous four years. The level of change was similar in primary and secondary schools.

Chart 3.9 breaks down the average cost of the various items of PE kit for primary and secondary schoolchildren. Items are only included which had a base size of 50 respondents or more for both primary and secondary school parents/carers.

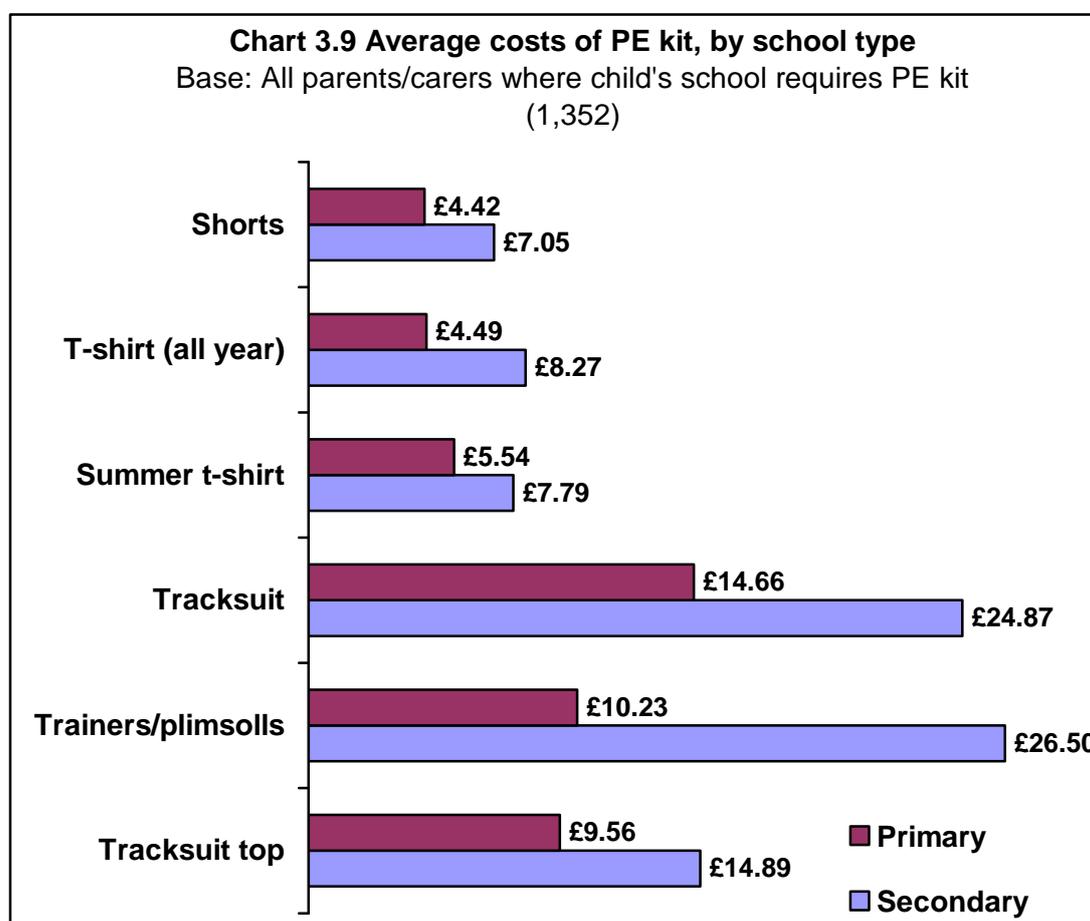


Chart 3.9 shows that various items were consistently more expensive for parents/carers of secondary schoolchildren than for those with children at primary school. The difference was greatest for tracksuits and trainers/plimsolls.

It is also possible to analyse costs in relation to where uniform could be bought (as examined in section 3.3). Base sizes are small for many items of PE kit, but the cost of t-shirts (worn all the year round) was cheaper when they could be bought from any outlet (£4.37 on average) than when some or all items had to be bought from the school or a designated shop (£5.97 some items and £7.85 all items). These differences remain when analysing primary and secondary schools separately. There were also differences overall for shorts and trainers/plimsolls. However, when looking at primary and secondary schools separately the differences for these items were not wide enough, relative to base number size, to be statistically significant.

Schools survey - Cost of each item of PE kit

Schools were also asked to give prices for each item (either required or optional) included in their PE Kit.

As mentioned in the last section, as a result of time and spatial constraints with the two questionnaires and in the interests of examining as many different costs as possible, the list of items of PE kit differed slightly between the parents/carers questionnaire and the schools questionnaire.

Parents/carers were not asked whether they were required to purchase jogging bottoms.

Schools were asked about football, rugby and hockey boot requirements as a combined item. Parents/carers were asked about football/rugby boots and hockey boots separately, depending on the sex of their child.

Schools were asked about requirements for swimming costumes. Parents/carers were asked about either a swimming costume or trunks depending on the sex of their child.

Table 3.16 shows the average price given for each item by all schools, together with a comparison with the parents/carers data.

Table 3.16 : Ave cost of items of PE Kit required – Schools & Parents

Base = All schools where item is either required or optional and all parents/carers where item is either required or optional (bases shown separately for both schools and parents/carers for each individual item of PE kit)

	Ave cost (Schools)	Ave cost (Parents/carers)	% difference
	£	£	%
Shorts (Schools: n=182, Parents/carers: n=938)	4.34	5.40	Parents: 24% higher
T-shirt (Schools: n=177, Parents/carers: n=919)	5.19	5.89	Parents: 13% higher
Full tracksuit (Schools: n=52, Parents/carers: n=251)	18.45	17.94	Schools: 3% higher
Jogging bottoms (Schools: n=90)	9.11	N/A ²⁰	N/A
Jumper/Tracksuit top (Schools: n=89) (Parents/carers: n=192)	9.53	12.32	Parents: 29% higher
Trainers or plimsolls (Schools: n=171, Parents/carers: n=997)	11.67	16.45	Parents: 41% higher
Football/rugby shirt (Boys only) (Schools: n=56, Parents/carers: n=140)	12.48	16.38	Parents: 31% higher
Netball skirt (Girls only) (Schools: n=40, Parents/carers: n=47)	8.38	9.38	Parents: 12% higher
Swimming costume/trunks (Schools: n=102, Parents/carers: n=338)	6.00	8.04 ²¹	Parents: 34% higher

²⁰ Parents/carers were not asked about requirements for jogging bottoms

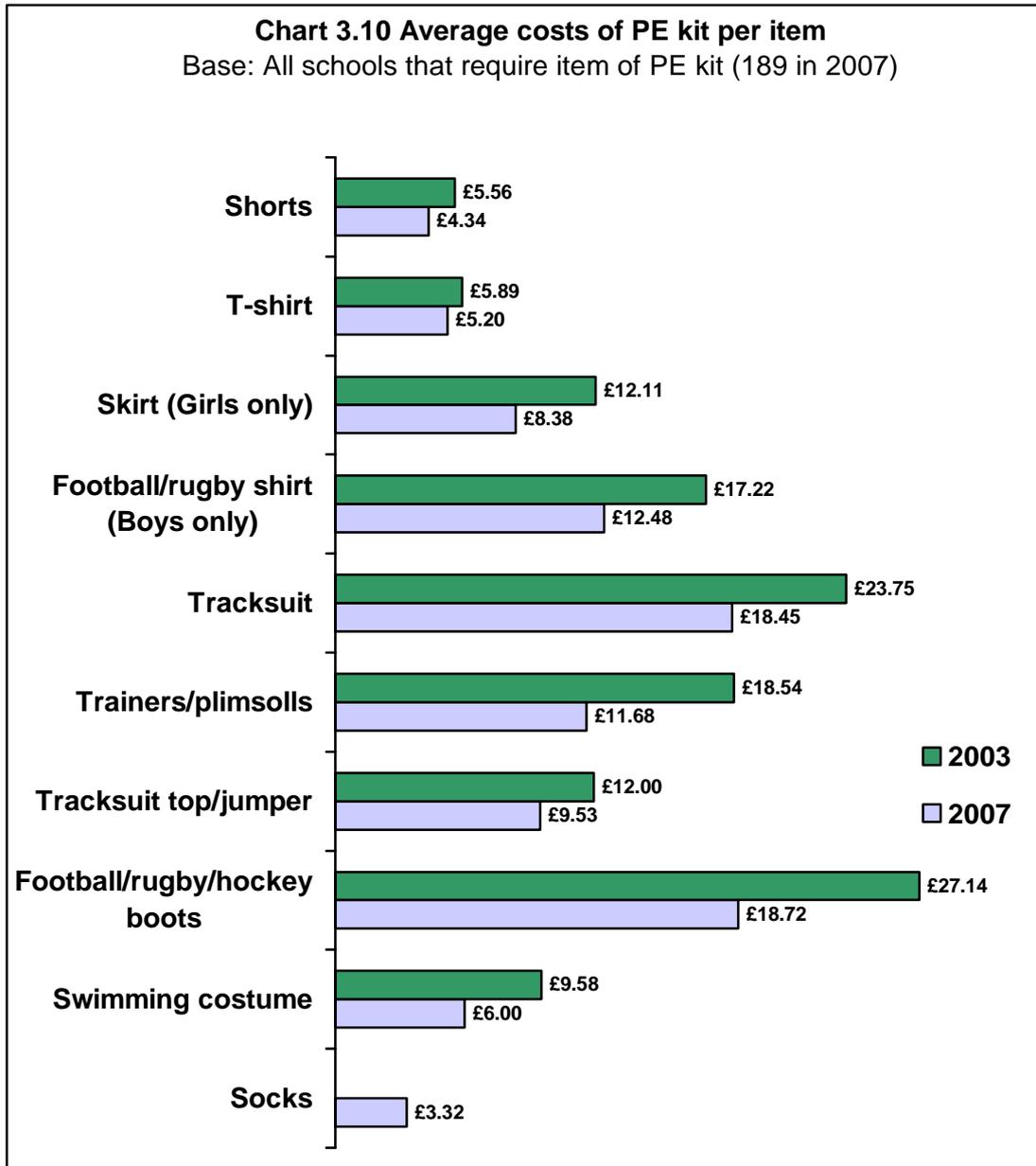
²¹ Schools were asked about requirements for swimming costumes whereas parents/carers were asked about swimming costume or trunks depending on the sex of their child. The average costs of swimming costumes and trunks from the parent's survey have been combined for comparative purposes.

Football/rugby/hockey boots (Schools: n=72, Parents/carers: n=202)	18.72	28.08 ²²	Parents: 50% higher
Socks (Schools: n=98, Parents/carers: n=661)	3.32	3.95	Parents: 19% higher

Costs given by parents/carers were in all but one case higher than those given by the school. Even allowing for the fact schools were able to give estimates rather than exact costs the data suggests that either schools underestimated the costs to parents/carers for PE kit (as well as uniform), or parents/carers overstated the cost of these items. However, this study is not able to provide further information on why the difference existed.

Chart 3.10 shows the average costs as reported by schools for each item (single item) of PE kit, for both the 2003 and 2007 surveys. In this chart, as in the rest of the report, figures from the previous survey have been adjusted for inflation using the RPI. This allows a more direct comparison between surveys.

²² Schools were asked about requirements for football/rugby/hockey boots as a combined item. Parents/carers were asked about football/rugby boots and hockey boots separately, depending on the sex of their child. The average costs of football/ rugby boots and hockey boots from the parent's survey have been combined for comparative purposes.



The findings are similar to the parents/carers survey. The average prices provided by schools for items of PE kit have decreased since 2003.

Parents/carers survey – Average annual cost of PE kit items

By taking the price for each item of PE kit (based on the parents/carers survey) and multiplying by the number of items bought in 2007, the annual cost to parents/carers for PE kit items was calculated. This “average cost in 2007” applies only to parents/carers who needed each item; “total costs” are discussed below.

Details are shown in Table 3.17. Please note that the average cost for each item in 2007 has been calculated by multiplying the cost of an item by the number bought for each respondent where the item was needed. An average cost was then calculated

for each item based on individual responses to both questions. Therefore the average cost is not simply obtained by multiplying the average cost of each item by the average number bought.

Table 3.17: Average spend in 2007 on PE kit items

Base: All parents/carers where child's school requires PE kit (1,352)

	% needing item (n = 1,352)	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shorts	97	5.40	1.4	7.93 (n = 1017)
Plimsolls/trainers	96	16.45	1.8	30.42 (n = 1035)
T-shirts (all year round)	92	5.89	1.8	10.22 (n = 995)
Socks	49	3.95	2.5	8.92 (n = 424)
Football/rugby boots (Boys only)	45	31.49	1.4	45.86 (n = 191)
Swimming trunks (Boys only)	39	6.55	1.3	8.93 (n = 181)
Football/rugby shirts (Boys only)	38	16.38	1.0	17.06 (n = 162)
Swimming costume (Girls only)	37	9.53	1.3	12.27 (n = 172)
Full tracksuit	30	17.94	1.1	18.91 (n = 282)
Jumper/tracksuit top	30	12.32	1.1	13.24 (n = 239)
PE shirt (summer)	22	6.91	1.7	11.44 (n = 175)
PE shirt (winter)	20	11.23	1.1	12.22 (n = 157)
Skirt (Girls only)	15	9.38	0.9	8.54 (n = 64)
Hockey boots (Girls only)	9	24.66	0.8	19.68 (n = 34)

Where items were required, the average annual cost was highest for football/rugby boots (£45.86), followed by plimsolls/trainers (£30.42). Reflecting the findings above on the average cost per item, these annual costs tended to be lower than in 2003.

The largest decrease was for tracksuits (from £25.32 in 2003 to £18.91 in 2007, adjusted for inflation).

Average annual costs tended to be higher for secondary schoolchildren than primary schoolchildren, most notably for plimsolls/trainers (£45.84 compared with £20.81), tracksuits (£25.56 compared with £15.75) and t-shirts worn all the year round (£14.12 compared with £7.92). These differences reflect a higher cost per item for secondary schoolchildren.

More detailed figures are included in the Appendices (Appendix F) for primary male children, secondary male children, primary female children and secondary female children. In addition to the overall differences noted above for primary and secondary schools, this analysis also shows that the average annual cost of shorts and plimsolls/trainers was particularly high for boys at secondary school (£12.89 and £50.58 respectively).

Total costs of PE kit

This section examines the total cost of PE kit in 2007. Unlike the previous analysis, this is based on all parents/carers requiring PE kit, rather than just those needing the specific item; it therefore shows the overall average costs per child.

Table 3.18 shows the total cost of PE kit in 2007, adding together all of the various items of uniform. The corresponding figures from 2003 are also shown, adjusted for inflation. The overall 2007 costs were slightly lower than in 2003. Note that socks were included in the PE kit items in 2007 but not 2003; as the average cost of socks per child was around £4 this means that the 2007 overall costs were lower still than in 2003 on a like-for-like basis.

Table 3.18: Total cost of PE kit in 2007, by gender and school type
 Base: All parents/carers where child's school requires PE kit (2007 bases shown for each sub-group)

	Total cost 2003	Total cost 2007
All parents/carers (n = 1,352)	£89.42	£87.22
Gender/school type:		
Primary school – boys (n = 381)	£59.86	£53.91
Secondary school – boys (n = 310)	£144.85	£155.26
Primary school – girls (n = 372)	£51.03	£52.53
Secondary school – girls (n = 289)	£105.28	£102.11

On average, the total cost of PE kit (when required) in 2007 was £87.22. The total cost was higher in secondary schools than in primary schools, and this applied in particular to boys at secondary school (the same pattern was found in relation to school uniform). The overall difference between secondary and primary schools can be attributed to the higher annual cost of items such as trainers/plimsolls (which had a higher cost per item in secondary schools than in primary schools) and football/rugby boots (an expensive item that were needed far more often in secondary schools than in primary schools).

The difference between boys and girls at secondary schools was the result of the costs of football/rugby shirts and boots, expensive items for boys with no equivalent for girls (in terms of the size of the cost).

All the above trends had been evident in 2003.

Within secondary schools, there was no difference in costs by school year, but in primary schools costs did increase in higher years: the average total cost per child ranged from £35.27 in Year 1 to £77.11 in Year 6, due largely to the increasing cost of trainers/plimsolls. There were no significant differences in the total cost of PE kit by social grade or household income.

Table 3.19 shows total costs, analysed by whether uniform or PE kit had to be bought from a designated shop or the school itself. Costs have been split by primary and secondary schools.

Table 3.19: Total cost of PE kit in 2007, by where uniform is available

Base: All parents/carers where child's school requires PE kit (1,352) (individual bases shown in each cell)

	Total cost: primary schools	Total cost: secondary schools
All parents/carers	£53.22 (n = 753)	£129.74 (n = 599)
Whether has to be bought from designated shop or school:		
All items from designated shop or school	£68.28 (n = 67)	£134.27 (n = 165)
Some items from designated shop or school, others from anywhere	£51.41 (n = 455)	£131.38 (n = 384)
All items can be bought from anywhere	£52.42 (n = 231)	£101.61 (n = 48)

The table shows a difference in both primary and secondary schools. Specifically, in primary schools, the total cost of PE kit was significantly higher where all items had to be bought from a designated shop or the school. In secondary schools, the total cost was significantly lower where all items could be bought anywhere.

3.3 Where uniform and PE kit can be bought

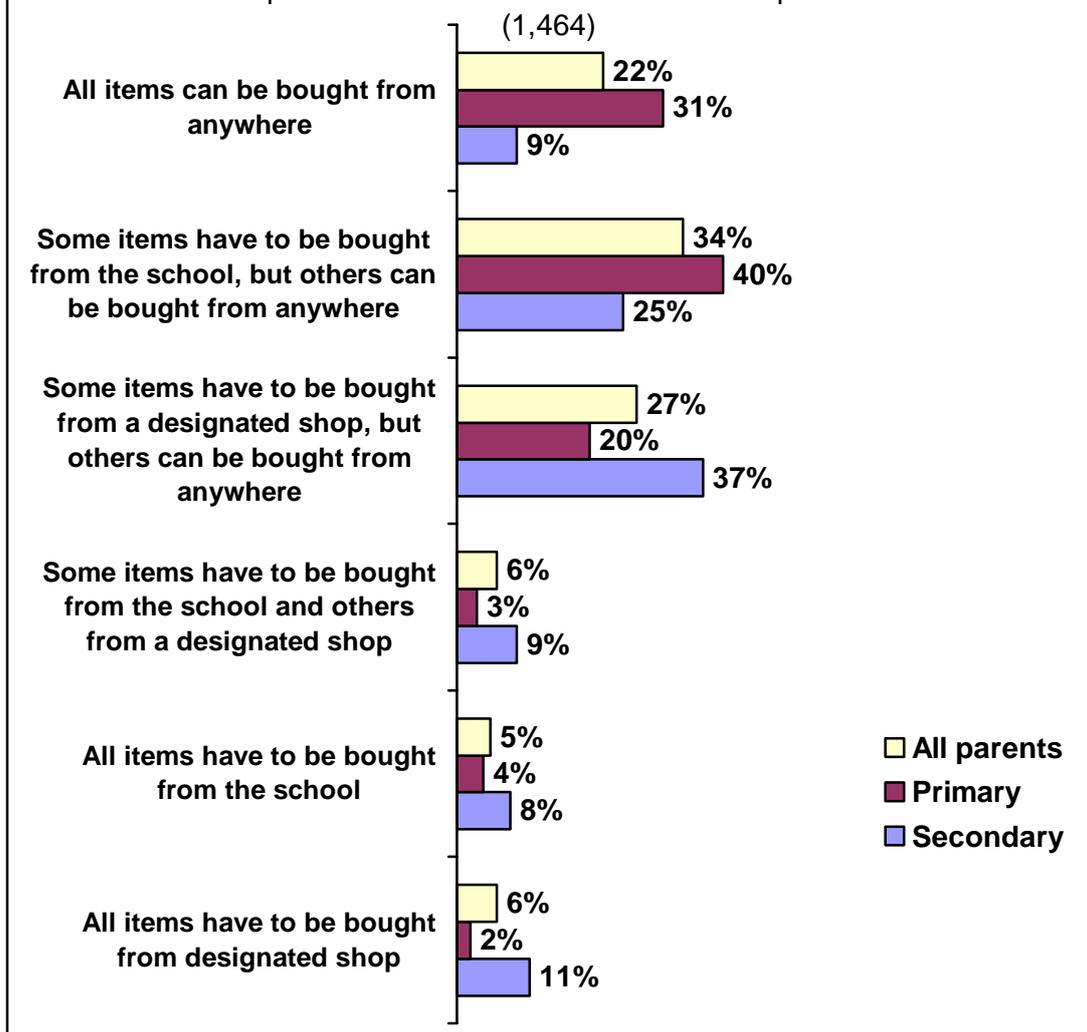
Parents/carers survey

As noted at the start of this chapter, the recent guidance to schools on school uniform makes explicit reference to suppliers. The guidance states that “Governing bodies should ensure that the uniform chosen is widely available in high street shops and other retail outlets, and internet suppliers rather than from an expensive sole supplier”.

Chart 3.11 shows the extent of choice given to parents/carers when buying uniform and PE kit for their child.

Chart 3.11 Options available to parents when buying uniform or PE kit

Base: All parents/carers where child's school requires uniform



Only 22 per cent of parents/carers said that all items could be bought from anywhere, and 17 per cent said that *all* items had to be bought from a designated shop and/or the school itself. These figures are very similar to those obtained in the 2003 survey, despite the recent guidance given to schools.

The chart also shows a marked difference between primary and secondary schools. Parents/carers of primary schoolchildren were more likely to say that all items could be bought anywhere. Where they were restricted, primary school parents/carers were more likely to have to buy items from the school itself, whereas secondary school parents/carers were more likely to have to use a designated shop.

There was also a difference by gender, with uniform for girls more likely to be available from anywhere than uniform for boys; this applied specifically at primary

school (37 per cent of parents/carers with a girl at primary school said all items could be bought from anywhere, compared with 26 per cent with a boy at primary school).

Schools survey

The issue was dealt with slightly differently in the schools survey. Schools were asked to record, for each recommended and optional item in their uniform and PE kit, if it had to be purchased from a specific supplier.

The following table shows the proportion of schools saying each item of uniform had to be bought from a specific supplier.

Table 3.20 : Whether uniform item has to be purchased from specific supplier

Base = All schools where uniform item required or optional (variable)

	Specific Supplier %	Not specific supplier %	Not Stated %
Sweatshirt/jumper/cardigan (n=203)	60	33	8
Blouse/shirt (n=180)	18	72	10
Trousers/skirt (n=188)	4	85	11
Dress/pinafore (Girls only) (n=117)	7	81	13
Shorts (Boys only) (n=106)	5	86	9
Blazer (n=33)	49	33	18
Tie (n=60)	72	14	14
Specific type of shoes (n=68)	2	81	18
Specific type of coat (n=30)	37	50	13
Bag (n=104)	31	57	12
Specific type of socks (n=24)	75	25	-
Cap/Hat (n=29)	38	41	21
Specific scarf (n=3)	100	-	-

Ties, sweatshirts/jumpers/cardigans, blazers and socks were the items of uniform most likely to have to be bought from specific suppliers (given the base size for scarf is too low to compare). In 2003, the items of uniform most likely to be purchased from a specific supplier were sweatshirt/jumper/cardigan (67 per cent), ties (66 per cent) and badges (73 per cent).

There were no differences between 2003 and 2007 in the proportion of schools that said any of the required school uniform items had to be purchased from a specific

supplier. However, looking at specific uniform items, schools were less likely in 2007 to say trousers/skirts had to be bought from a specific supplier compared with 2003 – 4 per cent versus 12 per cent.

Table 3.21 shows the proportion of schools whose items of PE kit had to be bought from a specific supplier. Football or rugby shirts (59 per cent), netball skirts (26 per cent) and full tracksuits (25 per cent) were the items of PE kit most likely to have to be bought from a specific supplier.

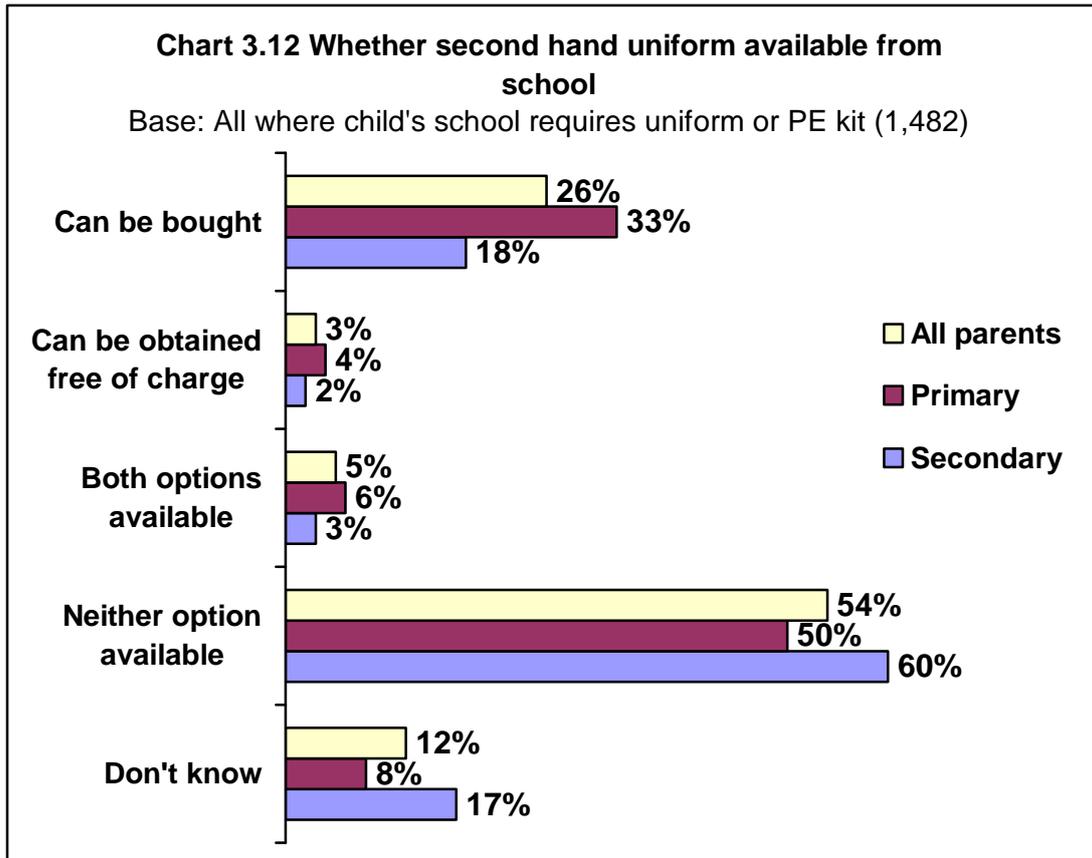
Table 3.21: Whether PE kit item has to be purchased from specific supplier
Base = All schools where item is either required or optional (variable)

	Specific Supplier %	Not specific supplier %	Not Stated %
Shorts (n=182)	10	80	11
T-shirt (n=177)	23	56	7
Full tracksuit (n=52)	25	58	17
Jogging bottoms (n=90)	13	72	16
Jumper/Tracksuit top (n=89)	19	65	16
Trainers or plimsolls (n=171)	1	88	12
Football/rugby shirt (Boys only) (n=56)	59	35	7
Netball skirt (Girls only) (n=40)	26	53	20
Swimming costume (n=102)	1	87	13
Football/rugby/hockey boots (n=72)	-	86	14

In 2003, the PE kit items most likely to be purchased from a specific supplier were: football or rugby shirts (54 per cent), t-shirts (27 per cent) and netball skirts (24 per cent). There were no differences in the proportion of schools in both 2003 and 2007 that required any item of PE kit to be purchased from a specific supplier. However, looking at specific items of PE kit, schools were more likely in 2007 to say full tracksuits and jogging bottoms had to be bought from a specific supplier compared with 2003 – 25 per cent and 13 per cent versus 8 per cent and 3 per cent respectively.

3.4 Whether school provides new or second hand uniform

Parents/carers were asked whether their child's school provided any opportunity for them to buy used school uniforms from the school, or be given them free of charge. Details are shown in Chart 3.12.



Overall, around one in three parents/carers (34 per cent) said that second hand uniform was available from the school, to buy and/or free of charge. This was more prevalent at primary schools than at secondary schools. Additionally, a considerable proportion of parents/carers (12 per cent) did not know if second hand uniform could be purchased or received free of charge from their child's school.

There was no difference in the figures between parents/carers of boys and girls. Parents/carers on a higher income and in higher social grades were more likely to say that these options were available (for example 41 per cent of those in AB social grades said this, compared with 33 per cent or less in other grades²³) despite the fact that families with lower incomes would generally be in more need of such a service.

²³ Examples of those in social grade E - casual labourers, state pensioners, unemployed. A fuller explanation is included in the introduction of this report.

3.5 Financial assistance with uniform

Parents/carers survey

Four per cent of parents/carers said they received some form of assistance or financial help with buying their child's school uniform, the same proportion as in the 2003 survey.

As one would expect, those on a lower income were more likely to have had financial assistance. This applied to 11 per cent of those with an annual income of less than £10,000 per year, 9 per cent of those with an annual income of between £10,000 and £15,000, and then falling to 3 per cent amongst those with an income of between £15,000 and £25,000. One in five (19 per cent) of those in social grade E received financial assistance.

The most prevalent form of assistance was a LA Grant (2 per cent of all parents/carers). Other forms of assistance were taken up by less than 1 per cent of all parents/carers: a charity grant, funds from the school and friends or family. Parents/carers whose child was in year 7 or 8 were most likely to say they had received a LA Grant (5 per cent), reflecting the focus of these grants on the transfer to secondary schools.

Schools survey

Schools were given a list of possible sources of assistance (including the provision of second hand school uniform) available to parents/carers that were unable to afford new school uniform. They were asked whether each source of assistance was available to parents/carers at the school. If it was, they also had to state whether the assistance was publicised and its frequency of use amongst parents/carers in 2007.

Table 3.22 : Sources of assistance for school uniform available to parents/carers
Base = All Schools where uniform required (n=206)

	Primary (n=145)		Secondary (n=61)	
	% where available	% publicised	% where available	% publicised
LA Grant	28	63	46	82
School provides second hand uniform free of charge	63	24	62	35
School offer second hand uniform at reduced price	47	69	36	67
School/PTA fund	15	32	36	38
Local or national Charity	6	38	5	67

Apart from offering second hand uniform free of charge or at a reduced price, primary schools were less likely than secondary schools to offer each of the respective sources of assistance.

It is interesting to note the low percentage of schools publicising the fact that second hand uniform is available free of charge. Only a quarter of primary schools (24 per cent) and just over a third of secondary schools (35 per cent) who offered this type of assistance said they publicised it. This may be the reason for the large discrepancy in the proportion of schools who said they offered this assistance and the proportion of parents/carers that said second hand uniform could be obtained from the school free of charge (just 3 per cent of parents/carers said this).

Compared to 2003, primary schools were more likely (in 2007) to say their school provided second hand uniform free of charge (63 per cent in 2007 versus 41 per cent in 2003). Additionally, secondary schools were less likely in 2007 to say assistance was offered through a local or national charity – 5 per cent in 2007 compared with 23 per cent in 2003.

Schools were also given a similar list of possible sources of assistance available to parents/carers who could not afford new PE kit. Again, schools were asked if each source of assistance was available, if so, whether it was publicised and its frequency of use (if available) amongst parents/carers in 2007.

Schools were less likely to offer assistance for PE kit than they were for school uniform; see table 3.23. However, both primary and secondary schools were more likely to publicise assistance for PE kit where it was available.

Primary schools were again less likely than secondary schools to offer each source of assistance (apart from offering second hand PE kit at a reduced price).

Table 3.23 : Sources of assistance for PE kit available to parents/carers
Base = All Schools where PE kit required (n=189)

	Primary (n=128)		Secondary (n=61)	
	% where available	% publicised	% where available	% publicised
Local Authority Grant	16	60	31	74
School provides second hand sports kit²⁴ free of charge	48	29	55	41
School offer second hand sports kit at reduced price	33	76	24	57
School/PTA fund	9	42	29	44
Local or national Charity	4	20	5	67

The table overleaf provides a breakdown of the number of children that used each type of assistance for both school uniform and PE kit in 2007 (PE kit percentages in brackets). Please note that not all schools provided a figure.

²⁴ While the parents/carers questionnaire referred to 'PE kit', the schools questionnaire asked about 'sports kit'. In the report we have used the term PE kit except in cases where we are referring directly to answer codes from the schools survey, as in this table.

Table 3.24 : Number of children who used each source of assistance for school uniform (and PE kit)

Base = All schools where assistance available (bases shown separately for uniform (and PE kit) for each source of assistance)

	None	1-2	3-9	10 +
	Number	Number	Number	Number
Local Authority Grant (n=68 for uniform, n=38 for PE kit)	12 (4)	7 (4)	5 (-)	4 (3)
School provides second hand uniform / PE kit free of charge (n=129 for uniform, n=96 for PE kit)	13 (12)	25 (15)	30 (15)	11 (8)
School offer second hand uniform / PE kit at reduced price (n=89 for uniform, n=56 for PE kit)	6 (8)	12 (4)	10 (7)	21 (9)
School/PTA fund (n=44 for uniform, n=30 for PE kit)	4 (5)	8 (5)	7 (4)	4 (3)
Local or national Charity (n=11 for uniform, n=8 for PE kit)	1 (-)	1 (1)	1 (2)	2 (-)

Table 3.24 shows there were variations between each of the assistance types in terms of the number of children taking them up. Higher numbers of children took up the offer of second hand uniform (or PE kit) at a reduced price, while Local Authority grants were generally taken up less frequently than the other assistance types. The number of children taking up each source of assistance was broadly similar for both school uniform and PE kit.

Comparison between primary and secondary schools is not possible because of small base numbers.

Schools were not asked this question in the 2003 survey.

3.6 Consequences of not wearing uniform

Parents/carers survey

Parents/carers were asked whether their child had ever been sent home for not wearing the correct uniform. Three per cent of parents/carers said this had ever happened, which was similar to the proportion recorded in 2003. This was higher in secondary schools than in primary schools (6 per cent compared with 1 per cent), and the figure was also higher than average amongst those on a low income (8 per cent of those with an annual income of less than £10,000) and in social grade E (15 per cent).²⁵

It should be pointed out that answers to this question could have been influenced by reluctance on the part of the parent to admit to having their child being sent home. It should also be noted that instances of children being sent home, for whatever reason, may not always be relayed accurately to the parent.

Schools survey

Schools were asked what happens if a child was to come to school without school uniform. The question was also repeated for PE kit.

Table 3.25 shows the action that is / would be taken by schools if children did not wear school uniform.

²⁵ Examples of those in social grade E are casual labourers, state pensioners and unemployed people.

Table 3.25 : What could happen when children come to school with no school uniform
Base = All schools where uniform required (n=206)

	Primary (n=145) %	Secondary (N=61) %	Total (N=206) %
Child receives verbal warning	30	61	39
Child loaned a uniform	26	63	36
Warning letter sent home	12	39	20
Child withdrawn from class	1	25	8
Child sent home	1	32	10
Child receives detention	1	31	10
Other:	20	10	17
No action	38	5	28

The most common action would be a verbal warning given to the child. Two-fifths (39 per cent) of all schools said this was an option used, although secondary schools were far more likely to use it compared with primary schools (61 per cent versus 30 per cent).

Secondary schools were more likely than their primary counterparts to take action, by whatever means. A third (32 per cent) of secondary schools said a child with no school uniform could be sent home (compared with just 1 per cent at primary schools). Additionally, a quarter (25 per cent) of secondary schools said children would be withdrawn from class (1 per cent of primary schools said this).

However, this survey asked for possible consequences and it should be remembered that schools may deal with issues on a case by case basis when dealing with a child with no school uniform (although this study did not investigate this).

When looking at all school types there were no differences with the 2003 findings.

The next table shows the possible action taken by schools in cases where a child comes to school without an item of PE kit.

Table 3.26 : What happens when a child comes to school without an item of PE kit

Base = All schools where PE kit required (n=189)

	Primary (N=128) %	Secondary (N=61) %	Total (N=189) %
Child loaned an item	51	68	56
Child receives verbal warning	30	66	41
Warning letter sent home	20	39	26
Child withdrawn from class	3	19	8
Child receives detention	4	39	15
Child sent home	-	3	1
Other	12	3	9
No action	20	9	16

Less severe consequences were more likely to be employed for children not bringing PE kit to school. Children were more likely to be loaned an item or receive a verbal warning but were less likely to be sent home.

As with school uniform, secondary schools were more likely to take action than primary schools.

3.7 Uniform and PE kit requirements for different groups of children

Schools were also asked to list any different uniform or PE kit requirements for different groups of children (for example, children in different year groups or houses).

Schools were only required to answer this question if there were differences. Eighty six per cent of schools did not answer this in relation to school uniform and 93 per cent did not answer in relation to PE kit. This seems to indicate that there were no differences in the vast majority of schools.

In relation to school uniform, 4 per cent of schools said children wear different ties (for different school years, school houses and Key Stages) and 1 per cent said that sixth form students do not wear school uniform.

For PE kit, 6 per cent of schools said children wore different football/rugby/netball kit (for different school years or school houses) and 2 per cent mentioned that children wear different house colours as part of their general PE kit.

There were no differences between primary and secondary schools.

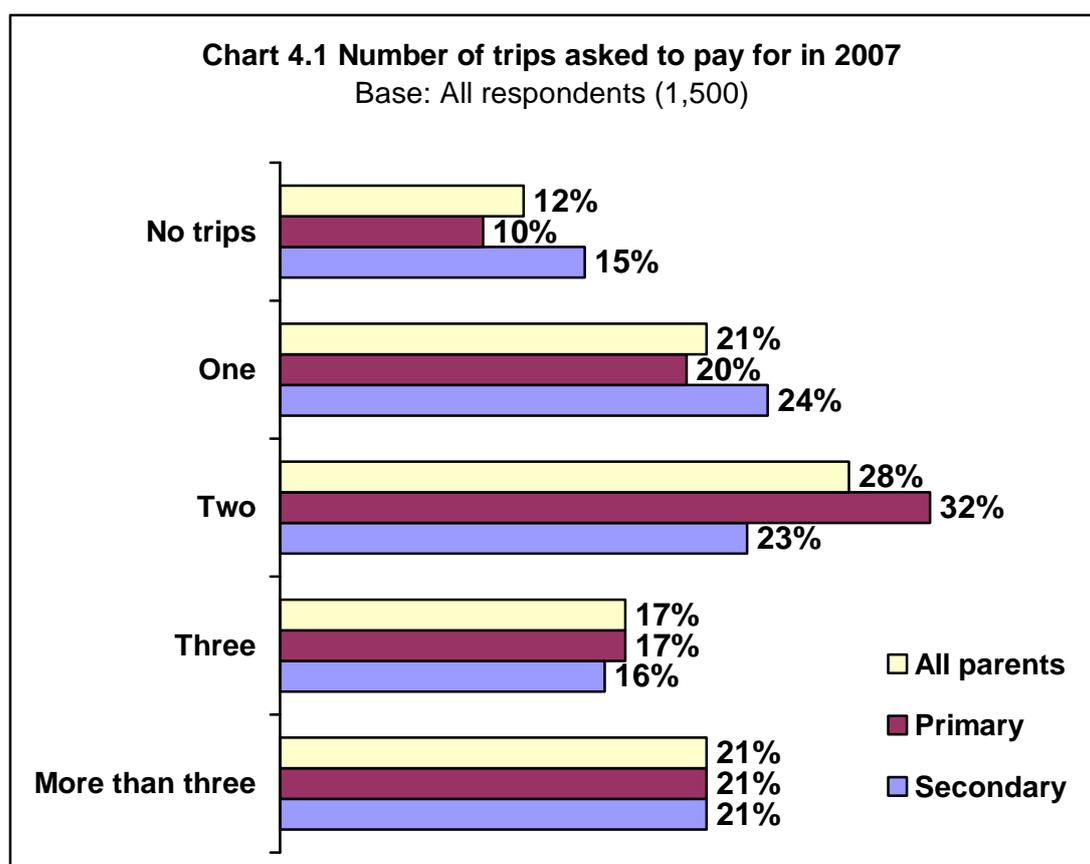
No comparison is possible with 2003 findings due to significant changes in the wording of the question.

4 School trips

Parents/carers were asked about school trips for their child in 2007. They were specifically asked only about trips they had been asked by the school to pay for.

4.1 The number of invitations for school trips in 2007

Overall, 87 per cent of parents/carers said they had been asked to pay for at least one school trip in 2007, including 21 per cent who had been asked to pay for more than three trips. Chart 4.1 shows the number of trips that parents/carers were asked to pay for, including a comparison of primary and secondary schools.



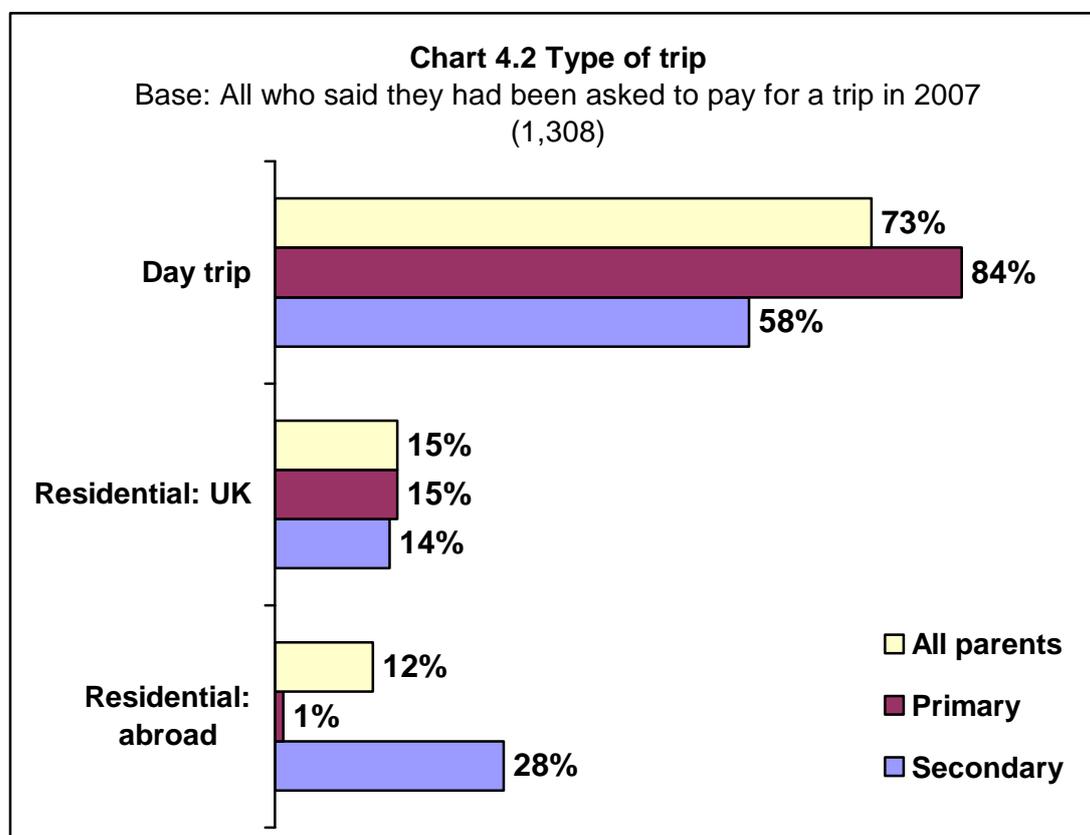
Parents/carers of children at primary school were more likely than those with children at secondary school to say they had been asked to pay for a school trip in 2007, and to have paid for two or more trips. This was despite the fact that parents/carers of children in Year 1 were least likely to have been asked to pay for a trip (78 per cent).

Parents/carers on a low income and in lower social grades were less likely than other respondents to say they had been asked to pay for a trip (83 per cent of those with an income of less than £15,000 and 78 per cent of those in social grade E).

The figures for 2007 were very similar to those obtained for 2003.

4.2 Types of trip

Parents/carers who said they had been asked to pay for a school trip in 2007 were then asked what type of trip the most recent one was. Findings are shown in Chart 4.2, with details shown for primary and secondary schools.



Most trips in primary schools were day trips, whereas there was a greater proportion of residential trips in secondary schools; residential trips abroad took place almost exclusively in secondary schools. In primary schools, residential trips in the UK only started in Year 4 with any frequency, but then increased in Year 6 when in 42 per cent of cases the most recent trip was a residential trip in the UK.

4.3 Whether child went on most recent trip

All parents/carers who had been asked to pay for a school trip in 2007 were then asked whether their child actually went on the most recent trip. Nearly all (92 per cent) said their child did go on the trip, the same proportion as in 2003.

Where the most recent trip was a day trip, 97 per cent of parents/carers said their child went on the trip, particularly in primary schools (99 per cent compared with 92 per cent in secondary schools). This was higher than the proportion whose child went on a residential trip: 88 per cent where the trip was in the UK and 69 per cent where

it was abroad. Again, attendance rates were higher in primary than in secondary schools (92 per cent compared with 82 per cent for residential trips in the UK).

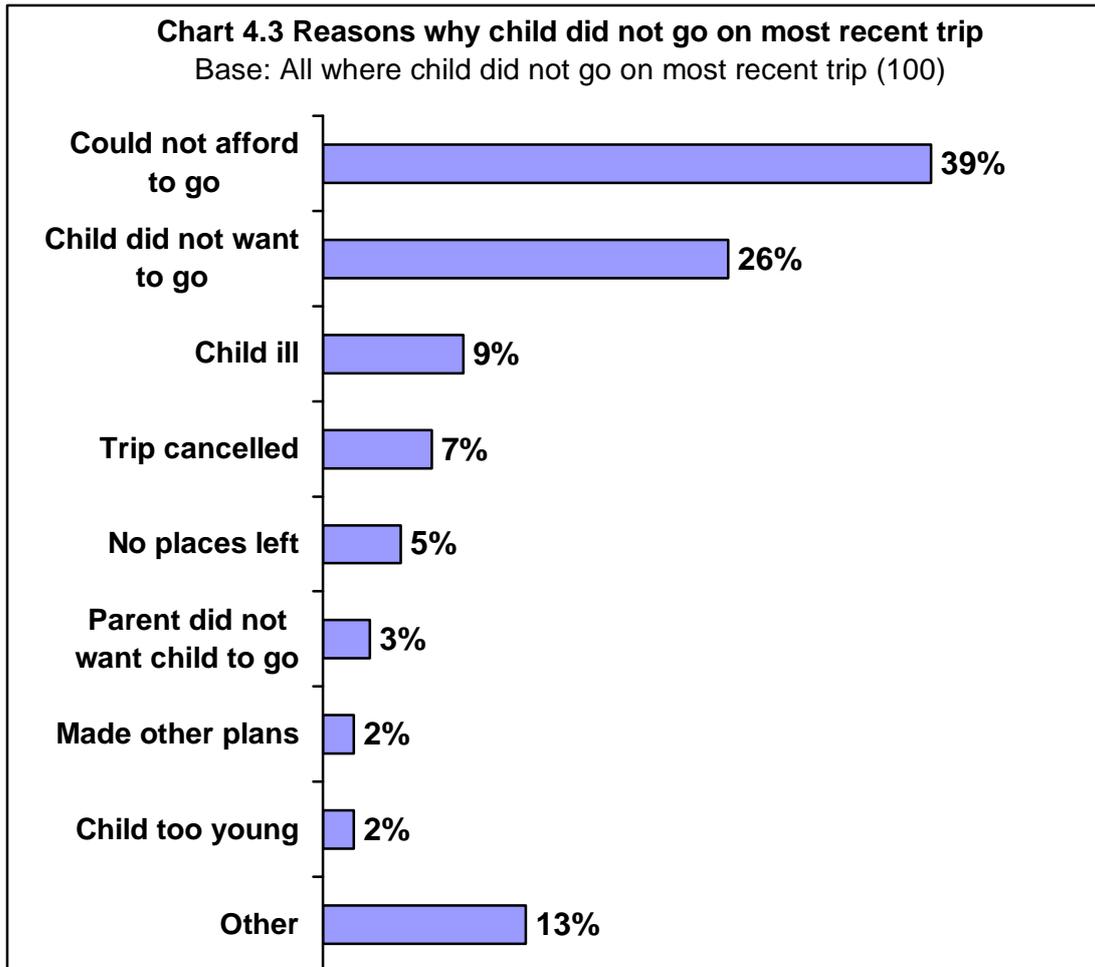
Parents/carers in Social Grade E²⁶ were less likely to say their child had been on the most recent trip (83 per cent).

When looking at whether or not a child had been on the most recent trip there were no differences by income for day trips. For residential trips, those on lower incomes were less likely than those with higher incomes to say their child had been on the trip: 73 per cent of those with household incomes of less than £35,000 said their child had been on the trip compared with 88 per cent of those with incomes of £35,000 or more. However, even amongst those with household incomes of less than £15,000 eight out of ten respondents (81 per cent) said their child had been on a residential trip in the UK and half (52 per cent) had been on a residential trip abroad.

4.4 Reasons for not going on most recent trip

Parents/carers who said their child did not go on the last paid trip they were invited on were asked why their child did not participate. The reasons given are listed in Chart 4.3 below.

²⁶ Examples of those in social grade E are casual labourers, state pensioners and unemployed people.



The chart shows that the most common reason for non-attendance was related to affordability, and it was mostly parents/carers with low incomes (less than £15,000 per year) who gave this answer. The proportion saying they could not afford the trip was higher where it was a residential trip (48 per cent) rather than a day trip (17 per cent), reflecting the higher cost of a residential trip (as discussed in section 4.6).

4.5 Whether parents/carers were asked to pay for the whole cost

Three in four parents/carers (75 per cent) said that they were asked to pay for the entire cost of the most recent trip. Where it was a residential trip, almost all parents/carers said they were asked to pay for the entire cost (94 per cent for residential trips in the UK and 96 per cent abroad). The proportion was lower for day trips: 68 per cent overall, and higher in secondary schools than in primary schools (74 per cent compared with 65 per cent). There were no differences by income or social grade.

4.6 Average cost of trips

The average amount paid for trips is shown in table 4.1. Although the question classifying trip types was different in the previous survey, it is clear that the cost of trips was very similar in 2007 and 2003 (after allowing for inflation).

Table 4.1: Average cost of trips	
Base: All parents/carers who were asked to pay for a trip (1,308)	
	Cost
Total (n=1,308)	£80.29
Primary schools:	
Day trips (n=648)	£9.47
Residential: UK (n=114)	£153.14
Secondary schools:	
Day trips (n=307)	£21.70
Residential: UK (n=76)	£160.07
Residential: abroad (n=145)	£402.70

As shown in Table 4.1, the cost of a day trip was higher in secondary schools than in primary schools. There was no significant difference between primary and secondary schools in the cost of residential trips in the UK.

Where parents/carers were asked to pay the entire cost, the average cost of a day trip was £15.53, compared with an average contribution of £7.90 where they did not have to pay the entire amount. There were no discernible differences by income or social grade.

In a separate question, parents/carers whose child was eligible for free school meals were asked if they were aware that their children did not have to pay for board and lodgings on residential trips. Just 8 per cent were aware of this.

4.7 Option to pay by instalments

Over two fifths (44 per cent) said they were offered the opportunity to pay for their child's most recent trip in instalments. This proportion was much higher for residential trips (89 per cent for trips both in the UK and abroad) than for day trips (27 per cent), reflecting the large difference in costs of these types of trip.

Parents/carers of children at primary schools were more likely than those at secondary schools to be offered the chance to pay for residential trips in the UK by

instalments (94 per cent compared with 82 per cent). There was no difference between primary and secondary schools for day trips.

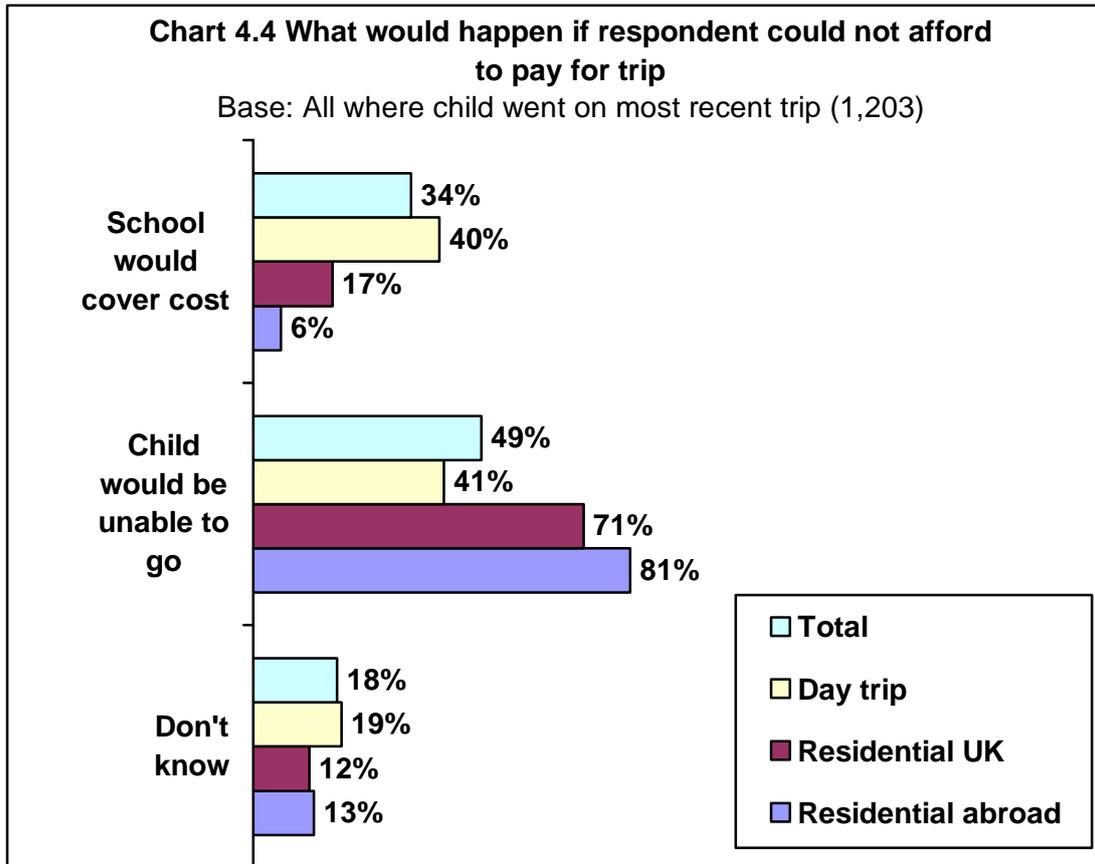
The chance to pay for day trips by instalments was more common amongst parents/carers in lower social grades (36 per cent of DEs, compared with 21 per cent of ABs). There was no difference in the figure for day trips amongst those on a low income, although the proportion of those in the highest income band (£50,000 or more per year) was lower than average (19 per cent)²⁷.

4.8 Consequences of not being able to afford trip

Parents/carers whose child went on the most recent trip were asked what they thought would happen if they had been unable to afford this.

One in three parents/carers (34 per cent) believed the school would cover the cost of the trip. However, 49 per cent believed that their child would be unable to go on the trip if they could not pay. Details are shown in Chart 4.4, broken down by type of trip.

²⁷ Because of the large differences between day trips and residential trips (in costs and other features), it makes sense to analyse sub-groups patterns for the two types of trip separately. In practice, sub-group differences tend to be discernible only for day trips, as the base sizes for residential trips are small.



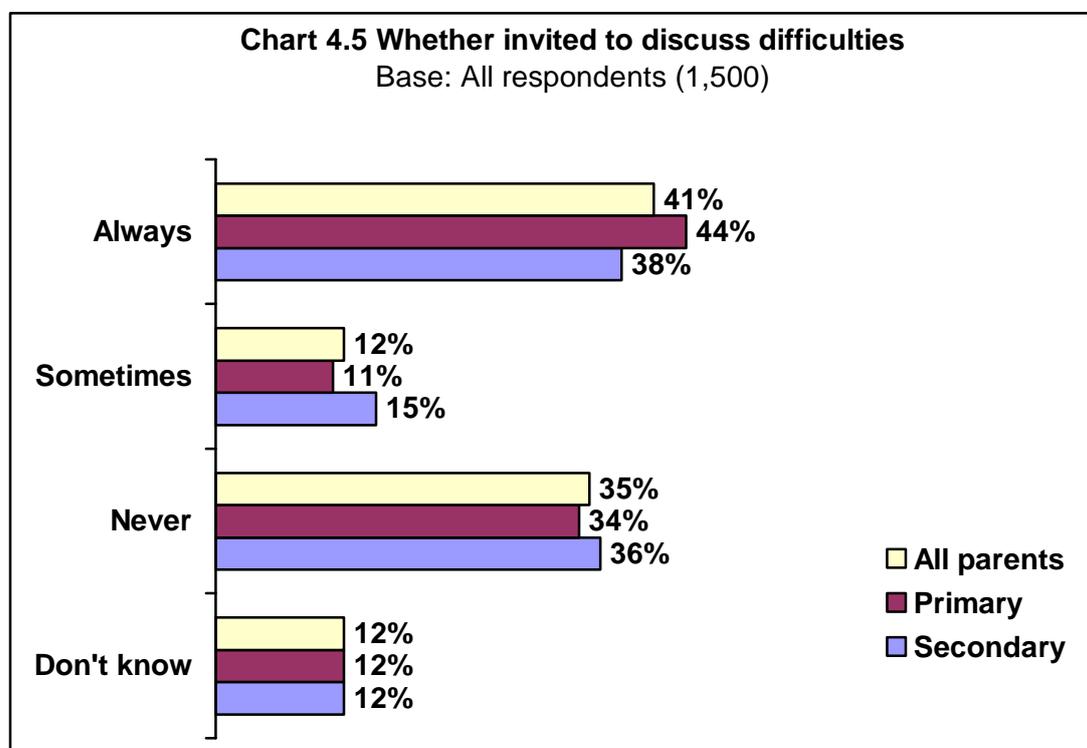
These figures were broadly similar to those obtained for 2003, although the proportion who said that the child would be unable to go was higher in 2007 than in 2003 (49 per cent compared with 44 per cent).

As Chart 4.4 shows, parents/carers were more likely to say they thought the school would cover the cost of day trips rather than residential trips, and this was particularly the case in primary schools (where 44 per cent thought the school would cover the cost of day trips compared with 30 per cent in secondary schools); there were no differences between primary and secondary schools in relation to residential trips.

Those on a low income and in lower social grades were less likely than other parents/carers to think the school would cover the cost of day trips (23 per cent of those with an annual income of less than £10,000 and 27 per cent of those in DE social grades). However, those who were not asked to cover the full cost of the trip were more likely to think the school would cover the cost of day trips if they were unable to pay (48 per cent).

4.9 Invitation to discuss payments with teachers

All parents/carers were asked whether they were invited to discuss any difficulties with paying for trips with the teacher(s) involved. Details are shown in Chart 4.5, analysed by type of school.



Overall, just over half of parents/carers (54 per cent) said they were invited – at least sometimes - to discuss difficulties with paying for school trips. Parents/carers whose child was at primary school were more likely than those with a child at secondary school to say they were *always* invited to discuss these types of difficulty.

Those on a lower income and in lower social grades were less likely to say they were invited to discuss payment difficulties: amongst those with an income of less than £10,000 per year, 27 per cent said they were always invited and 15 per cent sometimes invited; the corresponding figures for those in the highest income band (£50,000 or more per year) were 52 per cent and 10 per cent respectively. In the DE social grades, 33 per cent said they were always invited and 12 per cent sometimes invited.

Findings were similar for 2003, although the proportion who said they were never invited to discuss difficulties was higher in 2007 than in 2003 (35 per cent compared with 25 per cent).

4.10 Voluntary contributions for trips in school hours

Parents/carers were asked whether they had been asked to make a voluntary contribution towards a school trip that took place within school hours during 2007. Around two in three (68 per cent) said that they had been asked to do so, and this was higher in primary schools than in secondary schools (73 per cent compared with 62 per cent). In primary schools, the figure was higher in later school years (84 per cent in Year 6, compared with 65 per cent in Year 1). Overall, parents/carers on a lower income and in lower social grades were less likely to say they had been asked to make a voluntary contribution (63 per cent with an income of less than £10,000 per year, and 62 per cent of those in DE social grades).

Just over one in three of all parents/carers (38 per cent) said they were aware that no compulsory charge can legally be made by schools for trips during school time (although voluntary contributions can be requested). Again, this was lower amongst those on a lower income (33 per cent of those with an income of less than £10,000 per year) and in lower social grades (28 per cent in social grade E).

4.11 Schools survey

Schools were asked to list all the trips they had organised in 2007 and say for each one:

- Whether it was a day trip or residential trip
- Whether it was part of the curriculum
- Whether the school made a compulsory charge for the trip
- Whether parents/carers were asked for a voluntary contribution
- What the cost of the trip was to parents/carers
- Whether payment by instalments was allowed.

4.12 Profile of trips

Residential trips were relatively rare for primary schools, but more common amongst secondary schools (22 versus 41 per cent). Primary school trips were also more likely than secondary school trips to be part of the curriculum.

Table 4.2: Profile of school trips – schools survey

Base: All school trips

	Primary (n=657) %	Secondary (n=356) %
Type of trip		
Day	78	59
Residential	22	41
Part of curriculum		
Yes	86	64
No	12	34

Over nine in ten (92 per cent) of primary school day trips were part of the curriculum compared with 64 per cent of residential trips. For secondary schools, 78 per cent of day trips were part of the curriculum compared with 43 per cent of residential trips.

Larger secondary schools tended to organise more residential trips than smaller ones: amongst secondary schools with more than 1000 children, 50 per cent of trips were residential, compared with 31 per cent amongst secondary schools with between 500 and 1000 children.

4.13 Compulsory and voluntary charges

For primary schools, parents/carers were asked for a voluntary contribution for most school trips (72 per cent), but a compulsory charge was only made for 11 per cent of trips. Amongst secondary schools, parents/carers were asked for a voluntary contribution for 38 per cent of trips, and a compulsory charge was made for 33 per cent of trips. There were also a small proportion of trips where both a voluntary contribution and a compulsory charge were asked of parents/carers.

Whether or not a charge was made or contribution asked for varied by the type of trip. As shown in table 4.3, compulsory charges were more often made for residential trips, both amongst primary and secondary schools.

Table 4.3: Whether charges made for school trips, by type of trip – schools survey

Base: All school trips

	Primary day (n=512) %	Primary residential (n=145) %	Secondary day (n=211) %	Secondary residential (n=145) %
Compulsory charge and voluntary contribution	1	16	9	7
Compulsory charge	2	42	24	46
Voluntary contribution	80	41	41	33
No charge	16	1	25	14

At both primary and secondary schools, trips that were part of the curriculum were much less likely than non-curricular trips to have a compulsory charge made. However, 10 per cent of primary school trips that were part of the curriculum did incur a compulsory charge, and 32 per cent of secondary school curricular trips did so. These results are shown in table 4.4.

Table 4.4: Whether charges made for school trips, by whether trip part of curriculum – schools survey

Base: All school trips

	Primary curricular (n=563) %	Primary non-curricular (n=77) %	Secondary curricular (n=231) %	Secondary non-curricular (n=118) %
Compulsory charge and voluntary contribution	3	10	9	7
Compulsory charge	7	40	23	54
Voluntary contribution	76	38	45	22
No charge	14	12	22	18

Average cost of trips

Where a charge (either voluntary or compulsory) was made, schools were asked to say what the cost of the trip (per child) was. The average costs, broken down by school type and trip type are shown in table 4.5.

Table 4.5: Average cost of trips – schools survey	
Base: All school trips where a cost amount was given (837)	
	Ave. cost of trips (£)
Primary – Day (n=429)	£7.97
Primary – Residential (n=139)	£144.12
Secondary – Day (n=150)	£13.60
Secondary – Residential (n=119)	£274.56

The average costs of day trips were similar to those obtained in 2003 after adjusting for inflation, but the average costs of residential trips was much higher. More specifically, the average cost of residential trips in 2003 was £48.02 in primary schools and £55.67 in secondary schools. These large differences may have been caused by schools offering more residential trips abroad in the last year than they did in 2003 (with the costs of trips abroad generally being much higher than the costs of residential trips in the UK).

Whether instalments available

Almost all residential trips could be paid for in instalments: 98 per cent of primary and 88 per cent of secondary school residential trips. There were no primary school residential trips for which payment by instalments was not allowed, and for only 5 per cent of secondary residential trips payment by instalments was not an option. For the remaining 2 per cent of primary school and 7 per cent of secondary school residential trips, the school did not record whether or not payment by instalments was allowed.

Amongst primary schools, payment by instalments was allowed for 42 per cent of day trips, and not allowed for 35 per cent (for the remaining 23 per cent the school did not record an answer). Amongst secondary schools, 38 per cent of day trips could be paid for in instalments, 42 per cent could not (and the school did not record an answer for 20 per cent).

In primary schools where more than 20 per cent of children qualify for free school meals, payment by instalments was allowed for 65 per cent of day trips and not

allowed for 11 per cent. In primary schools with 20 per cent of children or less eligible for free school meals, payment by instalments was allowed for 35 per cent of day trips and not allowed for 42 per cent. For secondary schools, a similar pattern was observed, although the base sizes were too small to analyse with any degree of confidence.

For secondary schools, results were very similar to those obtained for 2003. For primary schools, payment by instalments was allowed for a higher proportion of day trips (52 per cent) than in 2003.

Notice typically given to parents/carers about trips

Schools were asked to say how much notice was typically given to parents/carers about both day and residential trips. A wide range of answers were given.

For day trips, around half (49 per cent) of primary schools gave a month's notice or more, but for secondary schools around 6 in 10 (61 per cent) gave parents/carers a month's notice or more. Very few primary schools and no secondary schools gave less than 2 weeks' notice. These results are shown in table 4.6.

Table 4.6: Notice given to parents/carers about day trips – schools survey

Base: All responding schools (147 primary, 61 secondary)

	Primary (n=147) %	Secondary (n=61) %
Minimum of 1 week	3	0
Minimum of 2 weeks	23	17
Minimum of 3 weeks	17	14
Minimum of 4 weeks/1 month	25	24
Minimum of more than 1 month	24	37
Not answered/non-specific answer	8	9

For residential trips, the notice period was generally much longer, with around a quarter of primary and secondary schools giving a year's notice (27 per cent of primary schools and 22 per cent of secondary schools), and less than 1 in 10 schools (7 per cent) giving less than 3 months' notice. These results are show in table 4.7.

Table 4.7: Notice given to parents/carers about residential trips – schools survey

Base: All responding schools (147 primary, 61 secondary)

	Primary (n=147) %	Secondary (n=61) %
Around 1 month or less	2	3
Around 2 months	5	3
Around 3 months/1 term	5	16
Around 6 months	25	19
Around 8-10 months	11	14
A year or more	27	22
Not answered/non-specific answer	25	22

What happens if parents/carers cannot contribute towards a trip

All schools were asked to say what would happen if parents/carers could not contribute towards a trip that was organised as part of the curriculum. Most schools said another source of funding would be used to pay for the child to go on the trip: the school fund (81 per cent); the school or PTA would apply for a grant from the educational trust (15 per cent); or the trip would be subsidised (5 per cent). Six per cent of schools said a loan would be offered to parents/carers, 13 per cent said the trip would be cancelled²⁸ and 3 per cent said the child would not go on the trip. Results were similar for primary and secondary schools.

Schools were also asked to say whether parents/carers were provided with the option of meeting school staff to talk about paying for the trip, and how this was done. Most schools (80 per cent) said such information was included in the letter that advised parents/carers of the trip, and 38 per cent said that this could be mentioned informally (for example at parents/carers evenings). A small minority of schools (5 per cent) said they had specific meetings for parents/carers about residential trips, while 2 per cent said there was no opportunity provided to talk about the cost of the trip. Results were again similar for primary and secondary schools.

²⁸ It seems unlikely that trips would be cancelled if just one or two parents/carers could not pay. We assume schools were giving this answer as what would happen if a notable number of parents/carers could not afford to pay.

These findings suggest much higher levels of provision by schools for discussing costs than findings from parents/carers, where just 41 per cent said the school always invited parents/carers to discuss difficulties with paying for the trip and 12 per cent said they were sometimes invited.

Board and lodgings on residential trips for children eligible for free school meals

Children who are entitled to free school meals are also entitled to free board and lodgings on residential trips. Schools were asked whether they publicised this.

Amongst primary schools 40 per cent did publicise this, and 35 per cent did not. The remainder said they did not have residential trips (15 per cent), or did not answer (10 per cent).

Amongst secondary schools, 43 per cent said they publicised and 50 per cent did not. The remaining 7 per cent did not provide an answer.

As shown in section 4.6 only 8 per cent of parents/carers whose child was eligible for free school meals were aware that they were entitled to free board and lodgings on residential trips, suggesting that this publicity by schools is not always reaching parents.

Schools were also asked to say how they covered the cost of those eligible for free board and lodgings. The most common answer was that the school pays, but it was also common for schools to ask for voluntary contributions to cover the cost. Full results are shown in table 4.8.

Table 4.8: How schools cover the costs of board and lodgings on residential trips for children eligible for free school meals – schools survey

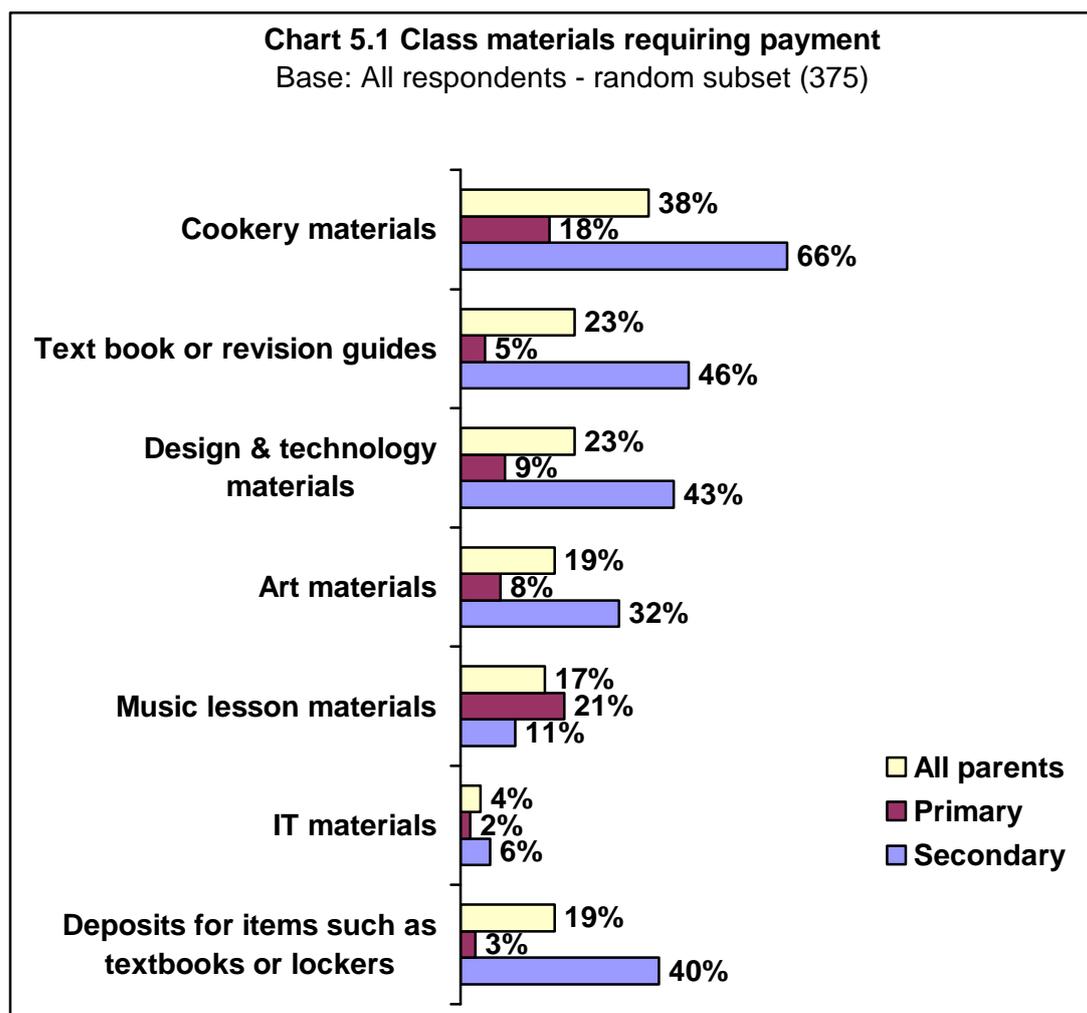
Base: All responding schools (147 primary, 61 secondary)

	Primary (n=147) %	Secondary (n=61) %
School pays	44	59
School asks for voluntary contributions	31	46
Local Authority pays	12	9
Trip cancelled	2	3
Not answered	33	15

5 Class materials

5.1 Class materials requiring payment

Parents/carers were asked whether they had been asked to pay for a number of class materials in 2007 (as listed in Chart 5.1). Questions in this chapter were limited to a random subset of respondents (375, a quarter of the total sample), in order to contain the interview length.



Parents/carers of secondary schoolchildren were more likely than those with primary schoolchildren to say they had to pay for a number of items, as shown in Chart 5.1. In addition, there were variations by school year. Payment for text books or revision guides was very low for Years 1-5, but then increased in Year 6 (24 per cent), before rising again in Years 9-11 (57 per cent across these three years). In primary schools, payment for design and technology materials was low in years 1-3 (3 per cent), but was then higher in Years 4-6 (15 per cent).

There were also differences by gender for cookery materials (paid for by 43 per cent of parents/carers of girls compared with 33 per cent of parents/carers of boys) and art materials (highest for girls at secondary school – 39 per cent).

Figures were similar to those obtained for 2003, overall and for both primary and secondary schoolchildren.

5.2 Average cost of class materials

Those who said they had been asked to pay for class materials in 2007 were then asked about these costs. Parents/carers were asked how much and how often they were asked to contribute towards materials and from these data the annual costs were calculated²⁹.

The cost assumptions made were based on class materials being needed throughout the school year. Unfortunately, time constraints with the questionnaire meant the exact period during which the lesson was taken by children could not be asked. There was the danger of costs being artificially inflated using this process - as lessons may not take place every week for a complete year. In order to minimise the chances of this, the recalculated costs paid for class materials were capped at £225 per annum for every subject apart from music, which was capped at £340. This reduced the chance of random outliers affecting the average score³⁰.

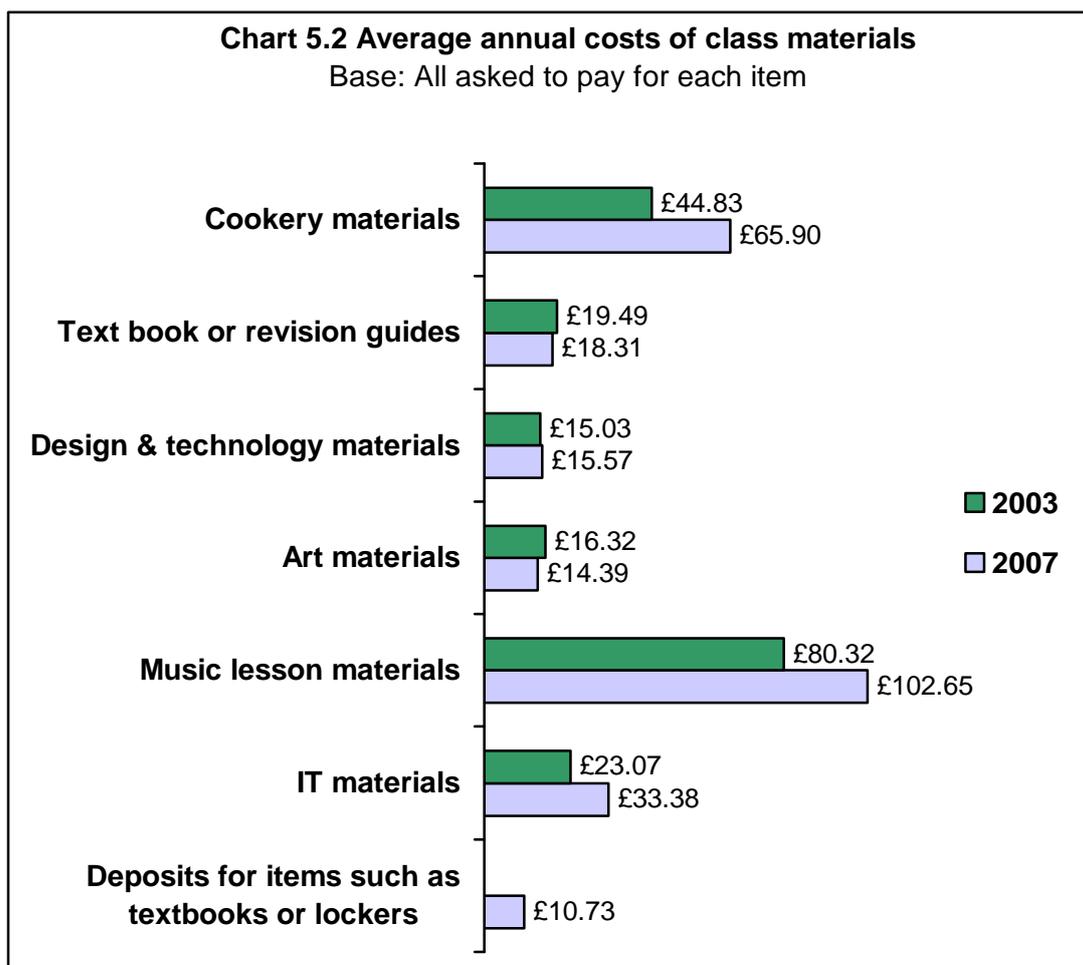
Chart 5.2 shows the average annual contribution of parents/carers who needed to pay for each item, including 2003 figures³¹ for comparison.

²⁹ Annual costs were calculated as follows:

Weekly cost multiplied by 39 (39 weeks in school year). Monthly cost multiplied by 11. Cost per Term multiplied by 3. Cost per Half Term multiplied by 6. Costs per 6 months multiplied by 2

³⁰ See Technical Appendix for further discussion of the capping issue

³¹ 2003 figures have been adjusted for inflation using the RPI



As Chart 5.2 shows, the most expensive items were music lesson materials and cookery materials.

Because of the small base sizes, most of the differences between 2003 and 2007 were not statistically significant; the exception was cookery materials, which were significantly higher in 2007 than in 2003.

With the exception of cookery materials, the small base sizes also make it difficult to compare costs in primary and secondary schools. The average amount paid for cookery materials in 2007 was significantly higher in secondary schools than in primary schools (£79.91 compared with £26.31). With cookery materials also required more often in secondary than in primary schools (as seen in Chart 5.1), the average annual cost for *all* parents/carers (including those who did not need to pay for cookery materials) was far higher in secondary schools (£52.23 compared with £4.96 in primary schools).

5.3 Schools survey

Schools were also asked about the class materials children were expected to supply: whether they were compulsory for all children to supply; compulsory for some; or recommended.

The items schools were asked about were broadly similar to those in the parents/carers survey although the schools survey covered this in greater detail. For example, instead of asking about materials for music lessons (as in the parents/carers survey) schools were asked about both musical instruments and sheet music.

Table 5.1 shows the proportion of schools that either said individual items were compulsory for all, compulsory for some or where they were recommended to children. Average costs for each item have also been included. However, caution should be taken when looking at these given the very small number of schools providing costs.

Table 5.1 : Class materials
Base = All responding schools (208)

	Compulsory for all (n = 208)	Compulsory for some (n = 208)	Recommended (n = 208)	Ave. Cost
	%	%	%	£
Atlas	1	2	3	£4.48 (n=2)
Lab coat/apron	4	2	5	£7.28 (n=8)
Disks/CDs/memory sticks	1	1	11	£6.25 (n=9)
Art materials	1	3	4	£11.10 (n=5)
Dictionaries	3	-	13	£4.08 (n=12)
Musical instruments	-	4	9	-
Sheet music	-	2	1	-
Cooking ingredients	8	11	8	£5.73 (n=19)

The table shows that most schools did not make it compulsory for children to bring these materials to school and only slightly higher proportions recommended children supply the items.

Schools that said a specific class material was either compulsory or recommended were asked to specify whether they would supply the item if children did not. Table 5.2 shows the schools that said they would supply the item if necessary.

Table 5.2 : Class materials	
Base = All schools where item compulsory or recommended (n=base)	
	School supply item if necessary
	%
Atlas (n=11)	75
Lab coat/apron (n=24)	65
Disks/CDs/memory sticks (n=28)	39
Art materials (n=18)	75
Dictionaries (n=32)	70
Musical instruments (n=19)	54
Sheet music (n=6)	69
Cooking ingredients (n=56)	59

A degree of caution needs to be taken with these findings given the small base numbers. However, apart from disks/CD/memory sticks, the majority of schools said they would supply these compulsory or recommended materials if children did not / were unable to. Small base numbers prevent comparison by school type.

Schools were also asked about any text books and revision guides that were either compulsory or recommended for Key Stages 2, 3 and 4. Schools that said there were compulsory / recommended books or guides were asked to provide a total cost per year to children.

Only very small numbers of schools said it was compulsory for children to provide text books and/or revision guides and this was consistent for all Key Stages. Due to these small numbers it is not practical to look at average costs.

Table 5.3 provides a breakdown of the responses provided for recommended books or guides. The number of schools providing cost information was very small so caution should be exercised when looking at average total costs.

Table 5.3 : Whether any compulsory text books or revision guides for KS2, 3 or 4 children

Base = All responding primary schools for KS2 (147), all responding secondary schools for KS3 and KS4 (61)

	Recommended	Average total cost per year to children for recommended books / guides
	%	
Text books		
KS2	4	£8.55 (n=4)
KS3	14	£11.00 (n=7)
KS4	14	£12.04 (n=8)
Revision guides		
KS2	30	£7.89 (n=44)
KS3	53	£9.47 (n=23)
KS4	53	£15.36 (n=22)

Schools were unlikely to recommend text books. However, a considerable number of schools said they recommended revision guides, especially for Key Stages 3 and 4 (as shown in table 5.3).

All schools were asked if extra-curricular musical instrument lessons were offered to children. Two-thirds (67 per cent) of schools said they were offered but there was either a charge for some children (37 per cent) or a charge for all children (30 per cent). One in five schools (18 per cent) said musical instrument lessons were offered and free to all children.

Primary schools were more likely than their secondary school counterparts to say there were no extra-curricular musical instrument lessons offered (12 versus 2 per cent).

There have been no changes since 2003 in the proportion of schools offering free or charged musical instrument lessons.

Finally, schools were asked whether children were ever excluded from taking part in lessons if they did not provide any of the class materials mentioned above. Only four schools said children would be excluded from lessons for this reason – these were all secondary schools.

6 Stationery items

6.1 Stationery items to be provided – parents/carers survey

Parents/carers were asked which items of stationery they had been asked to provide for their child in 2007.

Eight stationery items were included in the survey, but time constraints meant not every item could be asked of all respondents. The list of stationery items was therefore split in two with a random subset of around half of parents/carers being asked about the items in list one and the rest being asked those in list two.

The list used is shown below:

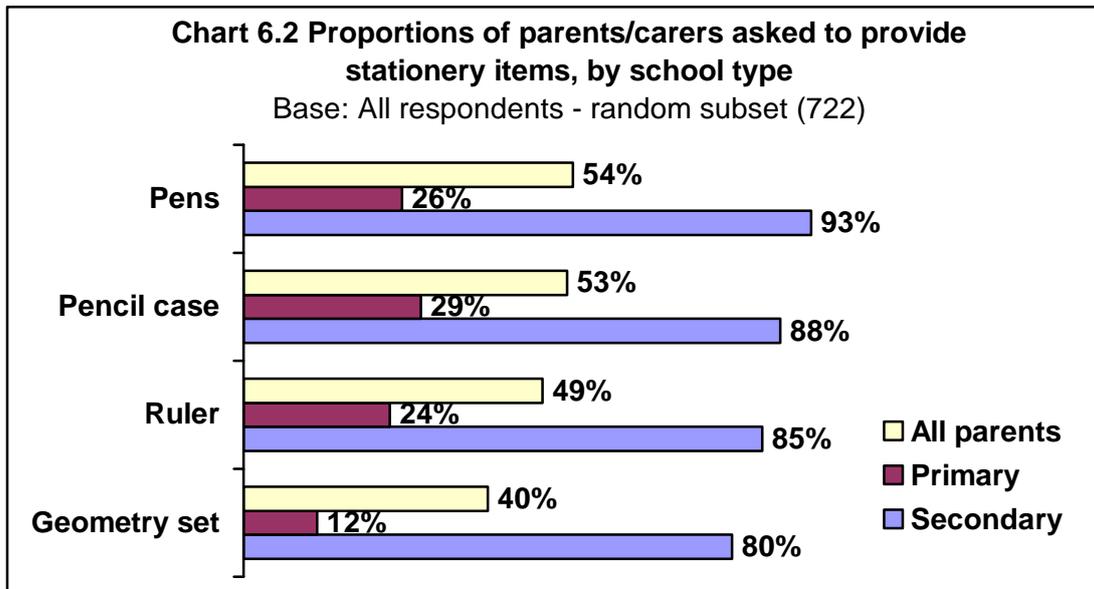
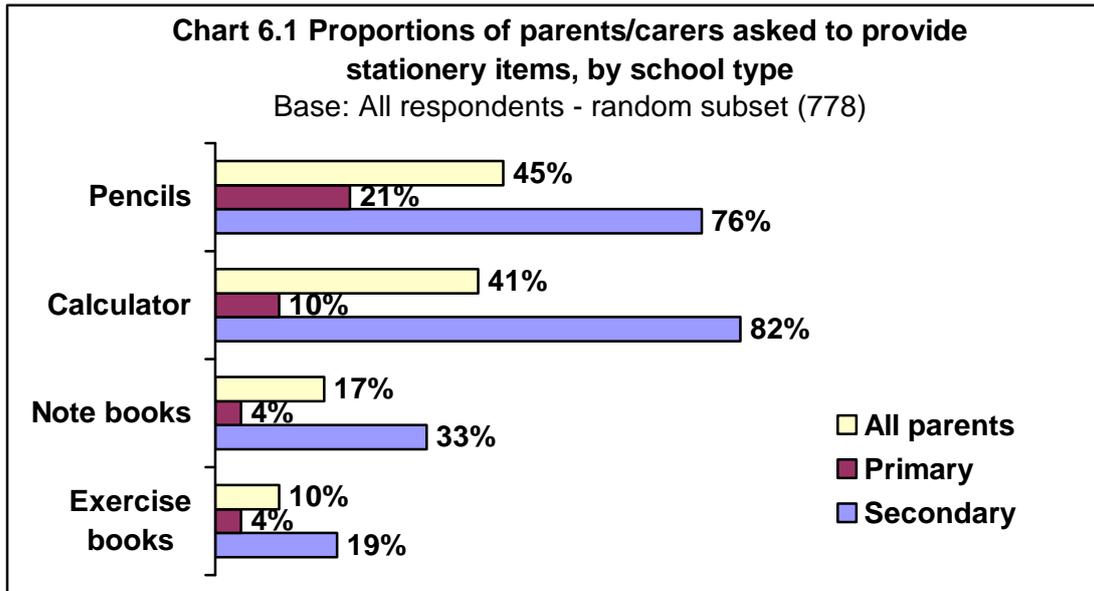
List 1

- Exercise books or paper
- Pencils
- Notebooks
- Calculator

List 2

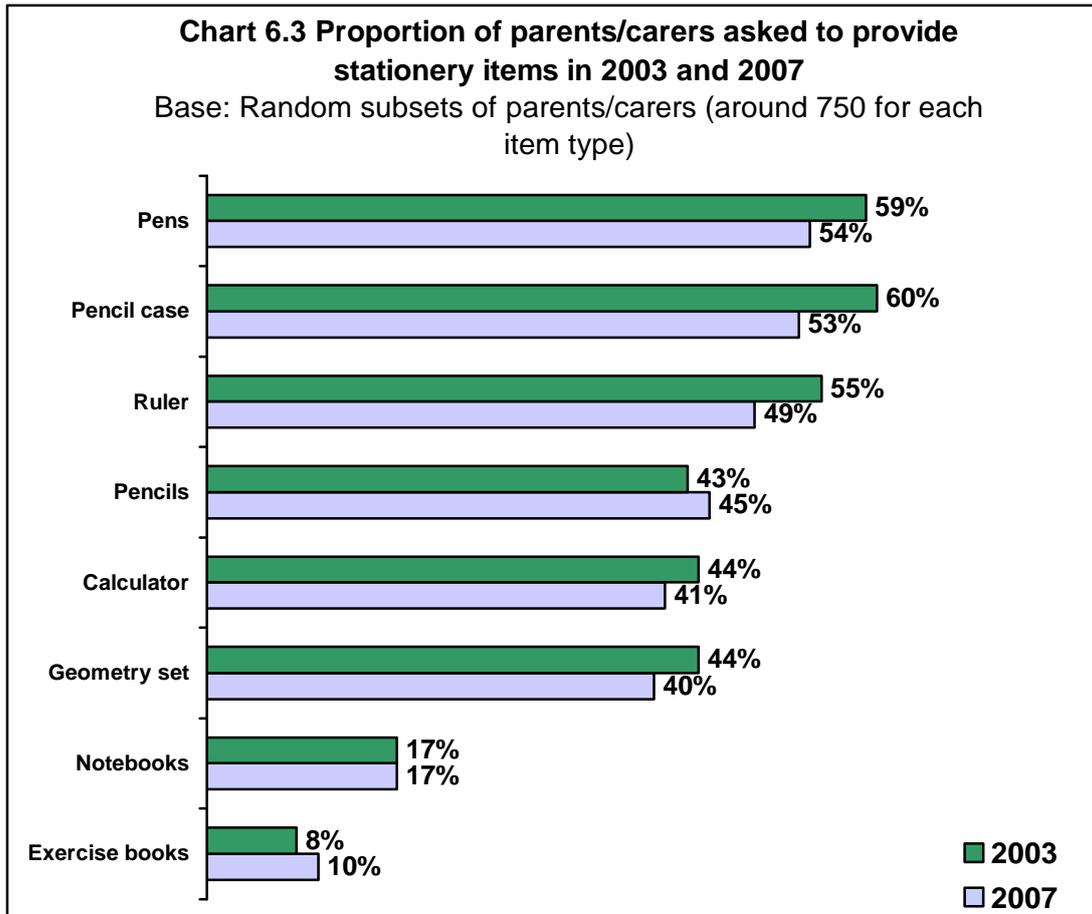
- Ruler
- Geometry set (including protractor, angled rulers etc.)
- Pens
- Pencil case

Charts 6.1 and 6.2 show the overall proportion of parents/carers who were asked to supply these items, as well as the proportions for parents/carers of primary and secondary schoolchildren.



Over half of parents/carers had been asked to provide pens and pencil cases, and a little under half had been asked for rulers, pencils, geometry sets and calculators. Few parents/carers had been asked to provide note books or exercise books or paper. As shown by these charts, being asked to provide stationery items was far more common for secondary schoolchildren than primary schoolchildren.

The proportions of parents/carers saying they had been asked to provide stationery items in 2007 were similar to the proportions in 2003, as shown in chart 6.3.



6.2 Stationery items to be provided – schools survey

The schools survey asked about a slightly different list of items, and there were two different questions on the schools survey that dealt with stationery items:

- One question asked whether items were compulsory, recommended or not required, whether the school supplied the items if children did not, and the approximate cost of the items. This question covered:
 - Geometry sets
 - Calculators
- Another question asked, for a list of stationery items, whether the school provided them, or whether children provided them. This question covered:
 - Note books
 - Pencils
 - Ruler
 - Pens

- Colouring pencils
- Rubber

Amongst primary schools it was fairly unusual for geometry sets to be required or recommended, but they were recommended at 37 per cent of secondary schools, and were compulsory (for at least some children) at 17 per cent of secondary schools. Calculators were required or recommended at most secondary schools, but few primary schools. These results are shown in table 6.1 and 6.2.

Table 6.1: Compulsory and recommended stationery items for primary schools			
Base: All primary schools (147)			
	Compulsory for all children	Compulsory for some children	Recommended
	%	%	%
Geometry sets	1	0	5
Calculators	2	1	5

Table 6.2: Compulsory and recommended stationery items for secondary schools			
Base: All secondary schools (61)			
	Compulsory for all children	Compulsory for some children	Recommended
	%	%	%
Geometry sets	10	7	37
Calculators	42	7	31

If children were required or recommended to provide geometry sets or calculators, most schools would supply these items if children did not.

Looking at other stationery items, nearly all primary schools provided the items themselves, while most secondary schoolchildren were expected to supply stationery items (with the exception of note books). These results are shown in tables 6.3 and 6.4.

Table 6.3: Whether school or children provide stationery items, for primary schools

Base: All primary schools (147)

	School provides %	Children provide %
Note books	91	3
Pencils	91	5
Ruler	92	5
Pens	91	5
Colouring pencils	91	6
Rubber	91	6

Table 6.4: Whether school or children provide stationery items, for secondary schools

Base: All secondary schools (61)

	School provides %	Children provide %
Note books	80	15
Pencils	19	80
Ruler	17	81
Pens	15	83
Colouring pencils	31	66
Rubber	19	80

These results support the data from the parents/carers survey which show that parents/carers of secondary schoolchildren were much more likely to have supplied stationery items than parents/carers of primary schoolchildren.

6.3 Cost of stationery items – parents/carers survey

For parents/carers who had been asked to provide a particular item, the average amount spent on that item in 2007 is shown in table 6.5.

Table 6.5: Average spend in 2007 on stationery items, by type of school

Base: All parents/carers who were asked to provide these items (variable)

	Total	Primary	Secondary
Exercise books or paper (n=77)	£11.21	£8.66	£11.84
Calculators (n=318)	£6.74	£3.93	£7.18
Pens (n=389)	£5.19	£4.20	£5.59
Pencils (n=346)	£4.61	£3.92	£4.85
Note books (n=126)	£4.26	£4.21	£4.27
Geometry sets (n=289)	£3.76	£4.23	£3.66
Pencil cases (n=383)	£3.32	£2.93	£3.50
Ruler (n=354)	£1.09	£1.08	£1.09

Exercise books or paper were the biggest expenditure, costing those who had to provide them an average of £11.21 for the year. However, as shown in section 6.1 very few parents/carers were asked to provide these. For all other stationery items the average amount spent on them in 2007 was less than seven pounds.

It is also possible to look at the total spend on stationery items for all parents/carers in 2007³², by adding together the amount spent on each of these eight items. These costs were:

- £4.40 for parents/carers of primary schoolchildren
- £25.51 for parents/carers of secondary schoolchildren

While parents/carers of primary schoolchildren were generally spending less on items that were required than parents/carers of secondary schoolchildren, this difference in costs is mostly due to parents/carers of primary schoolchildren being less likely to have to provide stationery items.

³² Where an item was not required the cost is £0, and where a respondent was not asked about an item the mean costs (calculated after including respondents for whom the item was not required, and calculated separately for primary and secondary schoolchildren) have been applied.

6.4 Cost of stationery items – schools survey

As mentioned in section 6.2, for geometry sets and calculators, schools were asked to say how much these items cost. The mean costs of these items were:

- Geometry set – primary schools: £4.50
- Geometry set – secondary schools: £2.47
- Calculator – primary schools: £6.33
- Calculator – secondary schools: £5.55

It should be noted that these means are calculated using very small base sizes, particularly for primary schools as schools were only asked the cost if an item was compulsory or recommended, and over half of schools were unable to provide a cost for these items.

7 Swimming lessons

7.1 Parents/carers survey

Due to time constraints within the questionnaire, only around a quarter (randomly chosen) of respondents were asked about swimming lessons. The remaining respondents were randomly assigned to other topic areas.

Overall, 12 per cent of parents/carers reported being asked to pay for swimming lessons in 2007, and this is the same proportion as in 2003. Also in line with the results from 2003, there was a marked difference between different types of school. Amongst parents/carers of secondary schoolchildren only 1 per cent reported being asked to pay for swimming lessons compared with 21 per cent for primary schools. Looking in more detail, it was parents/carers of children in Years 2 to 6 who were most likely to have been asked to pay for swimming lessons.

Parents/carers' responses to questions on how much and how often they were asked to contribute towards swimming lessons were used to calculate annual costs³³. The cost assumptions made were based on swimming lessons being taken throughout the school year. Unfortunately time constraints with the questionnaire meant the exact period during which swimming lessons were taken by children could not be asked and there was therefore a possibility of costs being artificially inflated by this process. In order to minimise the chances of this, the recalculated costs for swimming lessons were capped at £225 per year. This reduced the chance of random outliers affecting the average score³⁴.

The average annual amount paid by parents/carers who were asked to pay for swimming lessons was £69.20 in 2007.

The figure from 2003 (adjusted for inflation) was £63.42, which is not statistically significantly different.

The actual range of amounts paid in 2007 was quite wide: a fifth of respondents (20 per cent) paid less than £20 and around a quarter (24 per cent) paid £100 or more.

³³ Annual costs were calculated as follows:

Daily cost multiplied by 39 (under the assumption that children would only have swimming lessons one day a week, and there are 39 weeks in the school year). Weekly cost multiplied by 39. Cost per half term multiplied by 6. Cost per term multiplied by 3. Costs per year and one off costs kept the same.

³⁴ See appendix A for further discussion of the capping issue

7.2 Schools survey

All schools were asked whether they provided swimming lessons during school hours. Primary schools were more likely than secondary schools to provide swimming lessons, although for most primary schools this was only for some rather than all year groups. This is likely to be a result of the National Curriculum requirement for Key Stage 2 children to have swimming lessons.

Table 7.1: Whether school provides swimming lessons, by school type

Base: All responding schools (147 primary, 61 secondary)

	Primary (n=147) %	Secondary (n=61) %
Yes – to ALL year groups	22	14
Yes – to SOME year groups	64	34
No	11	51

Amongst schools that did provide swimming lessons, 6 per cent of primary schools and 4 per cent of secondary schools made a compulsory charge for swimming lessons, and 28 per cent of primary schools and 14 per cent of secondary schools made a voluntary charge. Most schools though (64 per cent primary and 75 per cent secondary) said swimming lessons were free.

Where schools did impose a compulsory charge or ask for a voluntary contribution, the amount of this charge, per child per lesson, was asked. Some schools were unable to provide an answer per child per lesson, and instead gave inflated responses, which it has been assumed for the purposes of analysis are charges per year or per term. The averages provided below therefore exclude any answers of more than £5, as it was considered that charges higher than this were unlikely to be the charge per child per lesson³⁵.

- Compulsory charge – primary schools: £3.50
- Compulsory charge – secondary schools: £1.50

³⁵ This assumption is based on the range of answers given, most were between £0.50 and £4.50, but there were a series of higher figures given (between £11.50 and £55) which were considered too high to be the charge per child per lesson. Seven schools (out of 43 that gave an answer to this question) have been excluded from this analysis for this reason.

- Voluntary charge – primary schools: £2.03
- Voluntary charge – secondary schools: £1.72

It should be noted that these means are calculated using very small base sizes, particularly for secondary schools, as not all schools provided swimming lessons, and few schools charged for them.

8 School fund

8.1 Whether parents/carers were asked to contribute to school fund

Parents/carers are sometimes asked by their child's school to contribute towards a school fund. The fund is typically used to pay towards various school activities, events and equipment.

Overall, 29 per cent of parents/carers were asked to contribute to a school fund on behalf of their child. Parents/carers of children at secondary school were more likely than parents/carers of primary schoolchildren to be asked for contributions (33 per cent versus 27 per cent), as were those with higher household incomes compared with parents/carers on lower household incomes; see table 8.1 for more details.

Table 8.1 : Whether parents/carers were asked to contribute to school fund

Base = All parents/carers (1500)

	Total (n = 1,500) %	Less than £15,000 pa (n = 303) %	£15,000-£34,999 pa (n = 471) %	£35,000 pa + (n = 528) %
Yes	29	22	29	34
No	70	78	71	66
Don't know	1	*	1	-

8.2 Amount parents/carers contributed to the school fund

Parents/carers who had been asked to contribute to the school fund were asked for the amount and how often a contribution was requested. The annual costs mentioned below were calculated from this information.³⁶

On average, parents/carers were asked to contribute around £35 a year. However, almost a third (30 per cent) of the 341 respondents providing a response gave a figure of £10 or less and 9 per cent said they were asked for £100 or more a year. The median cost was much lower than the average: £15.

³⁶ Annual costs were calculated as follows:

Weekly cost multiplied by 39 (39 weeks in school year). Monthly cost multiplied by 11. Cost per half term multiplied by 6. Cost per term multiplied by 3. Costs per year kept the same. One off costs divided by 5 for Secondary schools and 6 for Primary schools.

The average annual contribution requested by secondary schools was higher than the average requested from primary schools (£44 compared with £27). Parents/carers with higher incomes were more likely to be asked to contribute larger amounts compared with parents/carers on lower incomes; the average amount was £25 for parents/carers with incomes of less than £25,000 compared with £41 for parents/carers with incomes of £25,000 or more.

According to parents/carers, the average annual amount requested by schools in 2003 was £28 (this figure has been adjusted accordingly to account for inflation). There has not been a statistically significant shift.

8.3 Whether schools asked for a contribution

Over a quarter (28 per cent) of schools said they asked parents/carers to contribute to the school fund. This is very similar to the finding from the parents/carers survey where 29 per cent said they had been asked by the school to contribute.

A third (33 per cent) of parents/carers of secondary schoolchildren and 27 per cent of primary parents/carers said they had been asked for a contribution. These differences were not apparent in the responses provided by schools. However, there was a difference based on the funding status of the school. Voluntary aided schools were more likely than community schools to ask for a contribution (42 versus 26 per cent).

In 2003, 39 per cent of all schools said they asked parents/carers for a contribution (this represents a statistically significant decrease from 2003 to 2007).

All schools who had asked for contributions said they were voluntary for the parents/carers. However, 46 per cent said that reminder letters were sent out to those who did not immediately pay the voluntary contributions. Additionally, 14 per cent of the schools said parents/carers who decided not to pay towards the fund had to provide a reason for this.

8.4 Amount schools asked parents/carers to contribute to school fund

Based on the 33 schools who provided further data on contributions, the average amount requested was £19.57. Although this is less than the average amount parents/carers said they had been asked for (the average was £35 a year in the parents/carers survey), this difference is not statistically different due to small base numbers.

The average amount requested by primary schools (21 schools) was £24.16 and £11.74 amongst secondary schools (12 schools). Again, these differences are not statistically significant because of the small base numbers.

The figure from 2003 (adjusted for inflation) was £28.78, which is also not significantly different to 2007 (due to small base numbers).

8.5 How money can be paid into school fund

By far the most common means of payment was cash or cheque (92 per cent of the 58 schools asking for school fund contributions said this was how parents/carers paid into the fund). The only other way payment(s) could be made, that was mentioned by schools, was via direct debit (seven schools mentioned this).

Secondary schools were more likely than their primary school counterparts to say payment could be made through direct debit (5 out of 19 secondary schools said this compared with 2 out of 39 primary schools).

8.6 What the school fund was used for

The school fund was used most frequently as a means to support school trips; almost two thirds (64 per cent) of schools asking for a contribution said this. This was followed by over half (56 per cent) saying it was used to support school events and a quarter (25 per cent) saying it was used to contribute to the cost of school equipment. Table 8.2 provides more details.

Table 8.2 : What school fund was used for
Base = All schools asking for school fund (58)

	Total %
To support school trips	64
To support school events	56
To contribute to the cost of school equipment	25
To support school sports	23
To contribute to the cost of school maintenance	19
To contribute to the cost of additions to school buildings	19
To provide uniforms and equipment for children from more deprived families	14
To provide books for school library	9
Insurance	4
Other	16

Eight out of the 18 secondary schools (44 per cent) said they used the fund to provide uniforms and equipment for children from more deprived families. No primary schools used the fund for this purpose.

In 2003 the top three uses of the school fund were the same. Seventy per cent said it was used to support school trips, 61 per cent said it supported school events and 54 per cent said it contributed to the cost of school equipment.

8.7 Consequences of parents/carers being unable to pay the school fund contribution

Two fifths (39 per cent) of schools asking for contributions said there were no consequences / implications if parents/carers were unable to pay into the school fund. However, 17 per cent said activities may have to be cancelled, 12 per cent said the school makes up the shortfall and 10 per cent said the contributions were voluntary.

Small base numbers mean it is not possible to analyse by school type.

In 2003, the consequences/ implications were quite similar to above. Twenty three per cent said there were no consequences, while 21 per cent said there would be fewer school trips or activities and 10 per cent said the school/PTA would make up the difference.

9 School meals

9.1 Typical costs of meals – parents/carers survey

All parents/carers were asked how much they typically spent on meals during the school day (including school meals, packed lunches, meals off site, meals at home, etc) and how often they paid this amount. From this average, daily costs were calculated.³⁷

The majority of parents/carers said the cost of meals during the school day was £1 to £2 a day (64 per cent; including those who said £1 or £2 a day). A quarter (26 per cent) said the cost was more than £2 a day and one in ten (11 per cent) gave an amount of less than £1. The average cost was £1.86 (this includes responses from parents/carers whose child was eligible for free school meals – the average was £1.97 when excluding these respondents).

Looking at differences amongst sub-groups, meals during the school day were, on average, more expensive for secondary schoolchildren compared with their primary school counterparts (the average daily cost was £2.09 for secondary schoolchildren and £1.69 for primary schoolchildren). The average daily cost was also higher for parents/carers with an income of £25,000 or more compared with those with an income of less than £25,000 (£1.98 versus £1.75).

In 2003, the average daily cost of meals during the school day (adjusted for inflation) was £1.89. There has not been a significant shift.

9.2 Typical cost of meals – Schools survey

Schools that offered meals were asked to provide the typical cost of a school dinner as well as the amount allowed for free school meals.³⁸ The average typical cost was £1.81, which is very similar to the typical cost paid by parents/carers whose child had a school meal (£1.77). The average amount allowed for a free school meal was similar to the typical cost (£1.87).

³⁷ Daily costs were calculated as follows: Weekly cost divided by 5. Monthly cost divided by 20. Cost per term divided by 60. Cost per half term divided by 30. Cost per year divided by 180

³⁸ Costs of packed lunches provided by schools were not asked as the questionnaire did not differentiate between packed lunches bought by children and packed lunches supplied by schools themselves

As table 9.1 shows, average costs were similar for both primary and secondary schools.

Table 9.1 : Cost of school meal – Schools survey			
Base = All schools offering either a set menu or canteen school meal (198)			
	Primary (n = 139)	Secondary (n = 59)	All Schools (n = 198)
	£	£	£
Average cost of school meal	1.81	1.81	1.81
Average amount offered for free school meal	1.95	1.75	1.87

The average cost of a school meal in 2003 (adjusted for inflation) was £1.68 and the average amount offered for a free school meal (adjusted for inflation) was £1.62. Neither of these are statistically significantly different from the 2007 findings.

9.3 Options available and taken for school meals

The majority of parents/carers said their child usually took a packed lunch to school (58 per cent) and 38 per cent said their child had a school meal. Children in primary school were more likely than their secondary school counterparts to take a packed lunch (63 per cent versus 52 per cent), while secondary schoolchildren were more likely to have either had a school dinner or a meal out; see table 9.2 for more details.

Table 9.2: What type of meal child has during school			
Base: All parents/carers (1,500)			
	Total (n = 1,500) %	Primary (n = 866) %	Secondary (n = 634) %
Packed lunch	58	63	52
School dinner	38	35	41
Meal at home	1	-	1
Meal out	1	-	3
Other	1	1	2
Don't know	1	-	1

Parents/carers with higher incomes (£25,000 or more) were more likely than those with lower incomes (less than £25,000) to say their child took a packed lunch (66 per cent versus 53 per cent), while the latter were more likely to say their child had a

school dinner (42 per cent compared with 32 per cent). This may be partly due to eligibility for free school meals being based on household income and receipt of certain benefits.

Since 2003 there has been an increase in the number of children that took a packed lunch to school (50 per cent of parents/carers said their child did this in 2003) and a corresponding fall in children usually having school dinners (45 per cent in 2003).

Schools were also asked about the lunch options available to children. Just over eight in ten schools said they offered packed lunch provision (either facilities for children to bring their own lunch or provision by the school). Almost two thirds (65 per cent) said the school offered a set menu and 40 per cent offered a canteen. Eight per cent of schools said children could go off the school premises for their lunch.

Secondary schools were more likely than primary schools to have a canteen (90 per cent versus 20 per cent) and/or to allow children to go off-site (17 per cent compared with 4 per cent); see table 9.3 for more details.

Table 9.3 : School meals – options available for school meal			
Base = All responding schools (208)			
	Total (n = 208) %	Primary (n=147) %	Secondary (n=61) %
School meal - set menu	65	76	37
School meal – canteen	40	20	90
Packed lunch	83	86	75
Off-school (e.g. allowed to go to food outlet off-site)	8	4	17
Not stated	2	2	2

The findings in 2003 were similar to above. Eighty one per cent offered provision for packed lunch, 56 per cent offered a set menu, 44 per cent had a canteen and 9 per cent allowed children to go off-site.

9.4 Reasons for children not having a school meal

Parents/carers whose children did not usually have a school meal were asked the reasons why³⁹.

³⁹ Parents/carers could provide more than one reason

The main reason given was that the child simply preferred their usual lunch arrangement (55 per cent), followed by a third (32 per cent) who said their child preferred to eat with friends who had the same lunch arrangement. A quarter (26 per cent) said school meals were too expensive and 13 per cent said they were not value for money. One in ten parents/carers (10 per cent) said their child did not have school meals because they were not healthy.

Six per cent of parents/carers said their child did not have a school meal because they were not available at the school. Of the 58 parents/carers who gave this as a reason, four were referring to a child in secondary school. (N.B. where the funding is delegated to them, schools must provide a lunch to any child eligible for Free School Meals and to any other child if requested to do so, but there is no automatic requirement to provide a lunch. Where they do, there is no requirement for that lunch to be a hot meal.)

There are a number of differences with the 2003 data worth highlighting:

- Parents/carers were more likely, in 2007, to say their child preferred to eat with friends with the same lunch arrangement (32 per cent said this in 2007 compared with only 10 per cent in 2003);
- Parents/carers were more likely, in 2007, to say school meals were too expensive (26 per cent said this in 2007 compared with 15 per cent in 2003) or not value for money (13 per cent in 2007 compared with 5 per cent in 2003);
- In 2003, 8 per cent said school meals were not provided by the school but only parents/carers with a child in primary school gave this as a reason (six per cent said this in 2007, with four of the 58 parents/carers referring to a child in secondary school).

9.5 Free school meals

Twelve per cent of parents/ carers said their child was eligible for free school meals. DCSF School Census figures for 2007 show that 16 per cent of primary schoolchildren and 13 per cent of secondary schoolchildren were eligible for free school meals. The findings from this survey were similar, although slightly lower, indicating a possible bias in the sample: 12 per cent of parents with primary schoolchildren and 10 per cent with secondary schoolchildren said their child was eligible for free school meals.

In 2003, 17 per cent of parents/carers of a primary schoolchild and 10 per cent of secondary school parents/carers said their child was eligible for free school meals. The DfES School Census figures for 2002/3 showed that 17 per cent of primary

schoolchildren and 15 per cent of secondary schoolchildren were eligible for free school meals.

Table 9.4: Whether child eligible for free school meals

Base: All parents/carers (1,500) (bases also shown for each sub=group)

	School type		
	Total (n = 1,500) %	Primary (n = 810) %	Secondary (n = 591) %
Yes	12	12	10
No	87	86	88
Don't know	2	2	2

Lone parents/carers were more likely than two parent families to have a child eligible for free school meals (25 per cent versus five percent). Also, parents/carers from black and minority backgrounds were more likely than average to be eligible for free school meal provision (22 per cent compared with 12 per cent).

A third (32 per cent) of parents/carers whose child was eligible for free school meals said their child did not take up the free school meal. Parents/carers who had one or two children (and their child was eligible for free school meals) were more likely to say this compared with those with three or more children (37 per cent versus 18 per cent).

The main reasons provided by parents/carers whose child was eligible for a free school meal but did not receive one included:

- the child preferred another lunch arrangement i.e. to take their own food, eat at home or eat out (69 per cent of these parents/carers said this);
- the child preferred to eat with friends who had the same lunch arrangement (37 per cent); and
- school meals are not healthy (7 per cent).

In 2003, the same proportion (33 per cent) did not take up their free school meal. The main reason for not taking up the free meal was the same as above (67 per cent of parents/carers said their child preferred another option).

Just over half (51 per cent) of all parents/carers whose child was eligible for free school meals said they spent nothing on meals during school for their child. However,

4 per cent spent less than £1 a day, 18 per cent said they spent £1 up to £2 and just over a quarter (27 per cent) said they spent £2 or more.

In 2003, 47 per cent of parents/ carers whose child was eligible for free school meals said they spent nothing on their child's dinner at school, 15 per cent said they spent under £1 and 38 per cent £1 or more.

All parents/carers were asked whether they had ever received information on free school meals from their child's school and 38 per cent said that they had. The likelihood of parents/carers receiving this information from the school increased with lowering household income – 31 per cent of parents/carers with an income of £35,000 or more said they received information rising to 48 per cent amongst parents/carers on an income of less than £15,000.

Parents/carers whose child went to primary school were more likely than parents/carers of secondary schoolchildren to say they received information on free school meals (41 per cent versus 33 per cent).

9.6 Organisation of free school meals

Schools that provided school meals were asked how parents/carers were made aware of how to apply for free meals.⁴⁰ Fifty seven per cent said the process was outlined in the prospectus given to parents/carers, 53 per cent said parents/carers were invited to apply through a letter from the school and half (50 per cent) said the local authority provided information to the parents/carers; see table 9.5 for a full breakdown.

There were no differences between primary and secondary schools.

⁴⁰ The question was not asked of schools who said they only provided a packed lunch service. If schools only offered a packed lunch as their free school meal provision then their answers were not included.

Table 9.5 : How parents/carers made aware of how to apply for free school meals

Base = All schools offering either a set menu or canteen school meal (196)

	Total %
Process detailed in Prospectus given to Parents/carers	57
Parents/carers invited to apply via letter from school	53
Local Authority provide information to parents	50
Informally e.g. parents/carers evening	39
Left to parent to initiate – no advertising as such	8
Not stated	3
Don't know	1

In 2003, the wording to this question was slightly different but the response options were the same. The top three responses provided by schools were the same as above. Almost half (49 per cent) said the LA provided the information, 46 per cent said the process was detailed in a prospectus given to parents/carers and 44 per cent said parents/carers were invited to apply via a letter from the school.

Schools were asked how easy it is for children to know who does and does not receive a free school meal based on how school meals are paid for (e.g. via prepaid cards, cash, etc). Almost half (49 per cent) said it was not very easy and 29 per cent said it was impossible.

Secondary schools were more likely than primary schools to say it was quite easy for children to know who does and does not receive a free school meal (30 per cent versus 9 per cent); see table 9.6. This could be due to secondary schools being more likely to offer canteen meals compared with primary schools.

Table 9.6 : School meals – how easy it is for children to know who receives a free school meal

Base = All schools offering either a set menu or canteen school meal (196)

	Total (n =196) %	Primary (n=139) %	Secondary (n=57) %
Very easy	4	2	7
Quite easy	15	9	30
Not very easy	49	53	39
Impossible	29	32	19
Not stated	5	4	5

This question was not asked in 2003 so no comparison is possible.

10 Travel

10.1 Method of transport used to take children to school

The most common way for children to get to school was by walking (48 per cent). The second most common method was by car (32 per cent), followed by dedicated school bus (9 per cent) and public transport (7 per cent).

Looking at differences by school type, primary schoolchildren were more likely than their secondary school counterparts to walk (54 per cent compared with 39 per cent) or travel to school by car (38 per cent versus 22 per cent). Secondary schoolchildren were more likely to use a dedicated school bus (18 per cent compared with 2 per cent) or public transport (14 per cent versus 1 per cent).

Children from low-income households (less than £15,000) were more likely than those from higher income households to walk to school, but were less likely go by car; see table 10.1 for more details.

Table 10.1: Main method of transport used to take children to school
Base: All parents/carers (1,500) (bases also shown for each sub-group)

	Total (n = 1,500) %	Income			School type	
		Less than £15,000 (n = 303) %	£15,000- £34,999 (n = 472) %	£35,000+ (n = 530) %	Primary (n = 814) %	Secondary (n = 596) %
Walk	48	55	46	43	54	39
Cycle	2	2	2	2	1	3
Taxi	1	1	*	1	1	1
Car	32	26	33	35	38	22
School bus	9	8	8	11	2	18
Public transport	7	8	6	6	1	14
Other	2	1	5	3	2	3

The findings from 2003 were the same as above except parents/carers were more likely in 2003 to say their child used public transport (12 per cent said this in 2003).

10.2 Who pays for travel costs?

Over half (53 per cent) of parents/carers whose child travelled to school by public transport, taxi or school bus said the local authority paid for this. Just over a third (36 per cent) said they paid and 8 per cent of parents/carers said the school paid.

There were no differences based on school type, income or social grade.

In 2003, only a quarter (26 per cent) of parents/carers said the local authority paid for this transport, two-thirds (64 per cent) of parents/carers said they paid themselves and 8 per cent said the school paid. However, caution needs to be taken when comparing the responses from 2007 and 2003 given the relatively small number of respondents reporting that their child used public transport, taxi or school bus.

N.B. the Education and Inspections Act 2006 extended entitlement to free home to school transport for low income families. The Act came into force for primary schoolchildren in September 2007 and Secondary schoolchildren from September 2008.

10.3 Cost of travel

Parents/carers who paid for their child to travel to school by public transport, school bus or taxi were asked how much they paid for this and how often they paid. Weekly costs were then calculated using this information.⁴¹ The average amount paid by these parents/carers was £9.54 a week. Around a third (35 per cent) were paying £10 or more a week for travel. These findings should be treated with caution given the small number of parents/carers who were asked this question (84).

In 2003, the average (adjusted for inflation) was £8.31, which is not significantly different to the 2007 figure.

⁴¹ Weekly costs were calculated as follows: Daily cost multiplied by 5. Monthly cost divided by 4. Cost per Term divided by 12. Annual costs divided by 39. Per journey costs were multiplied by 10.

11 Other expenditure

Due to time constraints, some topics in the questionnaire were not asked of all parents/carers. The following topics were each asked of around a quarter of parents/carers (with each respondent being randomly assigned to one of the four topic areas):

- Class materials (and swimming lessons)
- School photographs
- Charity contributions
- Cake stall, raffle, jumble sale etc

Class materials are covered in chapter four, and swimming lessons in chapter six, but this chapter examines the other three areas of possible expenditure.

11.1 School photographs

Parents/carers survey

Two-thirds (67 per cent) of parents/carers reported buying school photographs in 2007. Parents/carers of primary schoolchildren were more likely than those with children at secondary school to have bought school photographs (80 per cent compared with 50 per cent).

Amongst parents/carers who had bought school photographs, the average amount spent on these in 2007 was £18.86, and this did not vary significantly between primary and secondary schools.

The average amount spent on school photographs in 2003 (adjusted for inflation) was £17.90, which is not significantly different to the 2007 figure.

Table 11.1: Average spend in 2007 on school photographs, by type of school

Base: All parents/carers who bought school photographs in 2007 – random subset (257)

	Ave. cost of photographs in 2007 (£)
All parents/carers (n=257)	£18.86
Primary (n=174)	£18.75
Secondary (n=83)	£19.09

Schools survey

Schools were asked how many times school photographs were offered to parents/carers in 2007. For primary schools the average was 1.5 times, and for secondary schools the average was 1.1 times. These results are similar to those obtained for 2003.

The cost of the basic package of school photographs varied between £3.50 and £29.00, but the average costs are shown below for primary and secondary schools.

- Primary schools: £10.77
- Secondary schools £11.90

These are similar to the costs of school photographs reported by schools in 2003 (adjusted for inflation).

These are lower than the costs reported by parents/carers, but parents/carers were asked how much they had spent on school photographs in 2007 (which could include multiple photographs) while schools were asked for the cost of the basic package of school photographs.

11.2 Charity contributions

Parents/carers survey

Most parents/carers (91 per cent) had been asked to contribute cash or items to charity on behalf of their child in 2007, and this was a little higher than in 2003 (when the figure was 84 per cent). Being asked for contributions to charity was more common amongst parents/carers of primary schoolchildren than secondary (96 per cent compared with 84 per cent).

Of those who had been asked for charity contributions, most had been asked on more than one occasion in 2007: 8 per cent were asked once; 27 per cent were asked twice; 28 per cent were asked three times; and 36 per cent of parents/carers said they had been asked for charity contributions four times or more in 2007. Parents/carers of children in primary schools were asked more frequently than those with secondary schoolchildren.

All parents/carers who were asked to contribute something to charity were asked to approximate the cost of their most recent contribution. Half (51 per cent) of parents/carers said their last contribution was £1, but the mean cost was higher at £2.56. Contribution amounts were similar for primary and secondary schoolchildren.

Schools survey

Schools were asked how many charity or non-uniform days they held during 2007. The average number of days was 3.3 for primary schools and 3.4 for secondary schools.

Schools were also asked the average contribution amount requested from parents/carers per event. The requested contribution varied between 20 pence and three pounds, but the averages were:

- Primary schools: £0.83
- Secondary schools: £1.00

These were similar to the 2003 findings (adjusted for inflation).

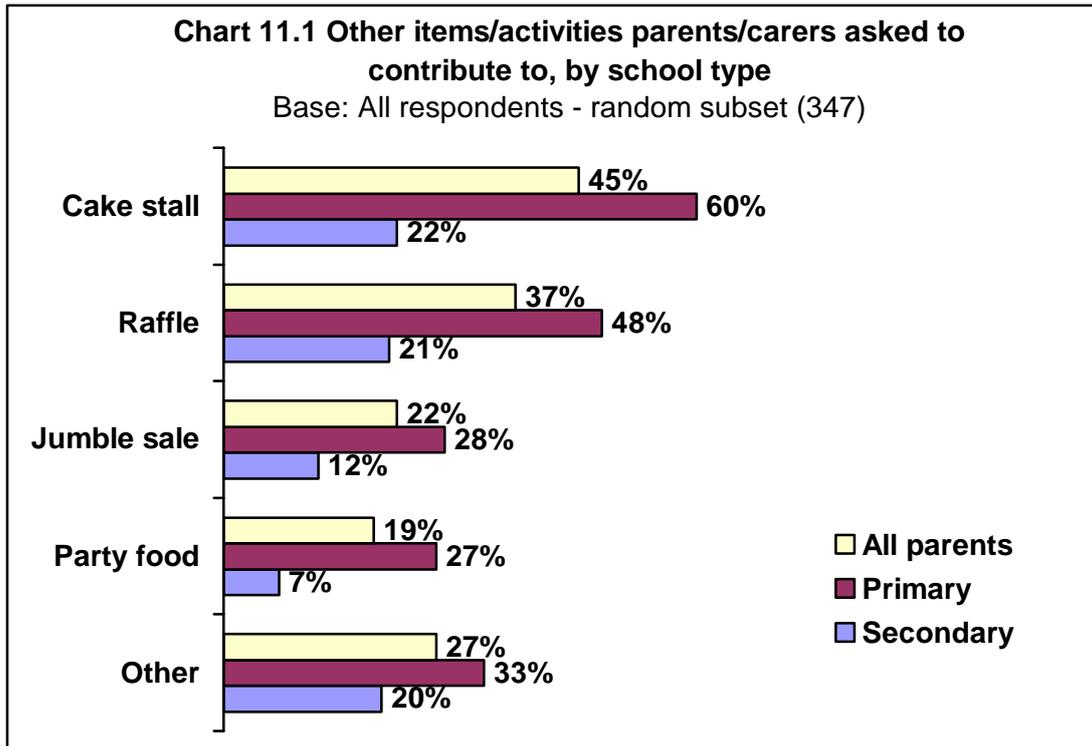
11.3 Contributions to other school activities

The final random subset of parents/carers were asked whether their child's school had asked them to contribute to any other school activities such as items for jumble sales or parties, raffles, or contributions for a cake stall.

A quarter (24 per cent) said they had not been asked to contribute to anything like this. This varied considerably between primary and secondary schools: 50 per cent of parents/carers of secondary schoolchildren said they had not been asked to contribute, compared with just 7 per cent amongst parents/carers of primary schoolchildren.

In total, 75 per cent of parents/carers reported being asked to contribute towards such an activity in 2007 (92 per cent of parents/carers of primary schoolchildren and 48 per cent amongst parents/carers of secondary). This is higher than in 2003 when 63 per cent of parents/carers had been asked to contribute.

The chart below shows the items and activities parents/carers said they had been asked to contribute towards, and highlights the difference between parents/carers of primary and secondary schoolchildren.



Those that had made a contribution to any of these items/activities were asked how much they had spent on these items/activities in total in 2007. The overall mean contribution was £12.47, and there was no significant difference between primary and secondary schools. This is similar to the mean contribution for such items in 2003 (adjusted for inflation).

12 Attitudes towards cost of schooling

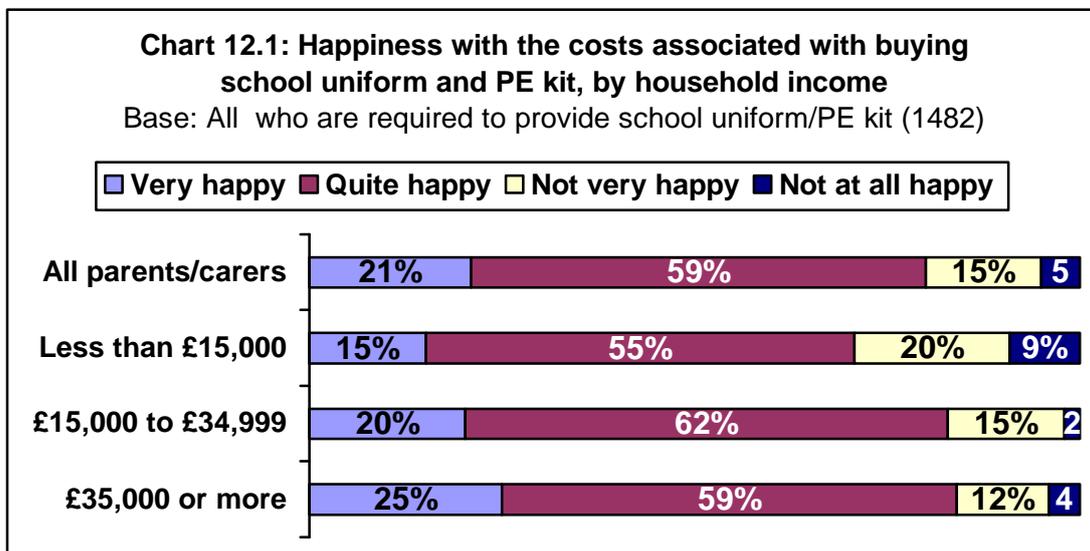
This chapter examines parents'/carers' happiness with the overall costs of schooling, and their ease of meeting those costs, as well as how happy parents/carers were with some more specific costs.

12.1 Attitude towards costs of uniform and PE kit

Overall, 21 per cent of parents/carers were very happy with the costs of uniform and PE kit, and a further 59 per cent were quite happy. A small proportion (5 per cent) of parents/carers were not at all happy with the costs of uniform and PE kit, while 15 per cent were not very happy.

As might be expected, happiness with these costs varied by household income, with wealthier families being more likely to be happy with the costs. Chart 12.1 shows happiness with the costs of uniform and PE kit for all parents/carers, and broken down by income.

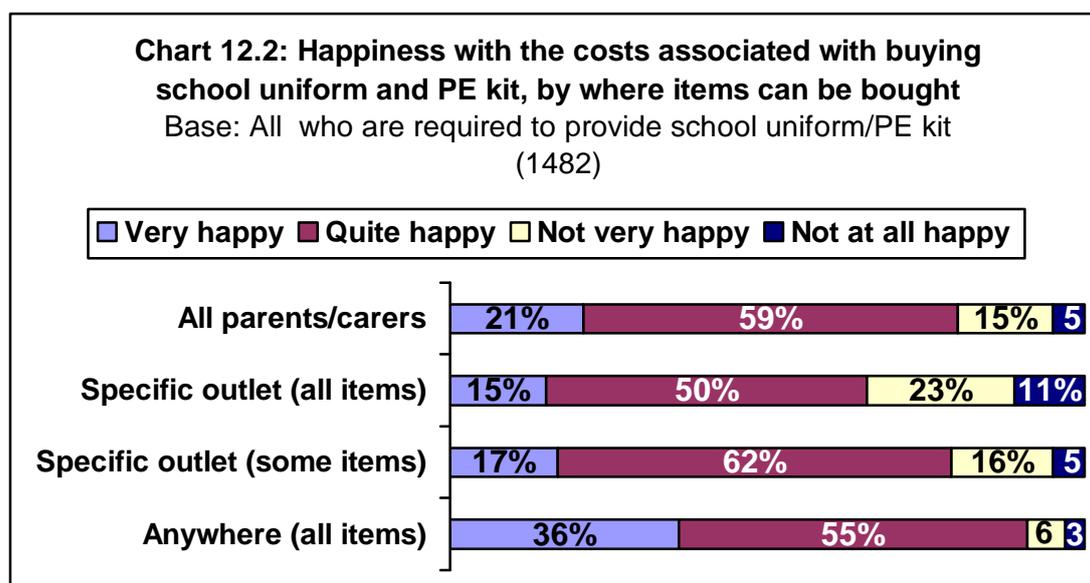
Amongst low income families (those with household incomes of less than £15,000), those who were not in work were particularly likely to be unhappy with the costs of uniform and PE kit: 38 per cent were unhappy compared with 26 per cent of low income families who were working⁴².



Another factor that had a marked effect on parents'/carers' happiness with the cost of uniform and PE kit was whether or not they had to buy it from a specific outlet. This is likely to be because costs were higher for parents/carers who had to buy uniform and

⁴² Where the chief income earner in the household was working either full time or part time.

PE kit items from specific shops. Respondents who were able to buy all uniform and PE kit from anywhere were much happier: 36 per cent of this group were very happy with the cost of uniform and PE kit. Chart 12.2 shows respondent's answers broken down by whether they had to buy all items from a specific supplier (either the school itself or a designated shop), some items from a specific supplier, or whether all uniform and PE kit items could be bought from anywhere.



Also, as might be expected, respondents who had spent more on school uniform and PE kit were less happy with the costs than those who had spent less: 38 per cent of those who had spent more than £300 on uniform and PE kit in 2007 were unhappy with the costs compared with 15 per cent of those who had spent between £200 and £300, and 9 per cent of those who had spent less than £200.

Nearly a third (31 per cent) of parents/carers of secondary schoolchildren were unhappy with the costs of secondary uniform and PE kit, compared with 12 per cent of primary. This is most likely due to the increased costs associated with uniform and PE kit for secondary schoolchildren. Costs were 62 per cent higher on average for secondary schoolchildren than for primary schoolchildren.

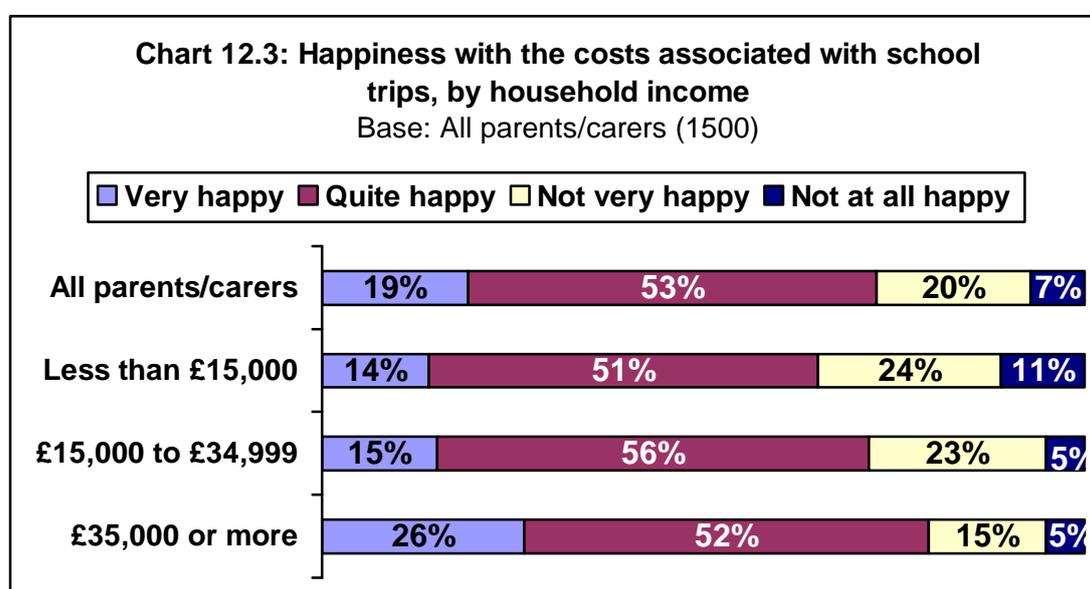
The number of children aged 5 to 16 in maintained school in the household also had an effect on how happy parents/carers were with the costs associated with school uniform. Amongst parents/carers with one child at maintained school, 19 per cent were unhappy, and 20 per cent of those with two children were unhappy, but the figure was higher for parents/carers with three or more children at maintained school: 25 per cent were unhappy with the costs of school uniform.

In the 2003 survey, happiness with the cost of school uniform and PE kit was asked as two separate questions, but the results obtained were similar to the 2007 results on happiness with the costs of uniform and PE kit.

12.2 Attitude towards cost of school trips

Levels of happiness with the cost of school trips were similar, although slightly lower than happiness with the cost of uniform and PE kit: 19 per cent of parents/carers were very happy with the cost of school trips, 53 per cent were quite happy, 20 per cent were not very happy, and 7 per cent were not at all happy.

Again, levels of happiness with the cost of school trips varied with household income: people with higher incomes generally being happier than those with lower incomes. These results are shown in chart 12.3.



Happiness also varied with the amount parents/carers had spent on school trips in the last year. Amongst parents/carers who had spent up to £20 on school trips, 79 per cent were happy. Amongst those who had spent between £20 and £100, 69 per cent were happy, and results were similar for parents/carers who had spent between £100 and £400. Only 55 per cent of parents/carers who had spent more than £400 were happy with the cost of school trips.

The number of trips parents/carers had been asked to pay for was also a factor: 77 per cent of those who had been asked to pay for one or two trips were happy with the costs, compared with 65 per cent of those who had been asked to pay for three or more trips.

Parents/carers of primary schoolchildren were generally happier than those of secondary schoolchildren (75 per cent happy compared with 67 per cent of secondary school parents/carers). This is likely to be because parents/carers of secondary schoolchildren spent a lot more on average on school trips in 2007 than parents/carers of primary schoolchildren.

Parents/carers with fewer children aged 5 to 16 attending maintained school were generally happier with the costs of school trips than those with more children. Amongst parents/carers with one child, 24 per cent were unhappy, rising to 27 per cent of those with two children and 34 per cent of those with three or more children at maintained school.

Levels of happiness with the cost of school trips were similar to the results from the 2003 survey.

12.3 Feeling pressured into paying for school trips

All parents/carers were asked how much they agreed with the statement “I sometimes feel pressurised into contributing to the cost of school trips”. Opinion was fairly evenly split, although slightly more respondents agreed (that they do feel pressurised) than disagreed.

Respondents with household incomes of less than £35,000 were more likely than those with higher incomes to feel pressurised into paying for school trips, as shown in table 12.1.

Table 12.1: Agreement with statement “I sometimes feel pressurised into contributing to the cost of school trips”, by household income

Base: All parents/carers (1,500)

	All parents/ carers (n=1,500) %	Income less than £35,000 (n=814) %	Income £35,000 or more (n=576) %
Agree a lot	29	32	25
Agree a little	21	23	18
Neither agree nor disagree	6	5	7
Disagree a little	18	19	15
Disagree a lot	25	20	32

The number of trips respondents had been asked to pay for had an effect on whether parents/carers felt pressured to contribute: 62 per cent of those who had been asked to pay for three or more trips agreed they did sometimes feel pressured compared with 45 per cent of those who had only been asked to pay for one or two trips.

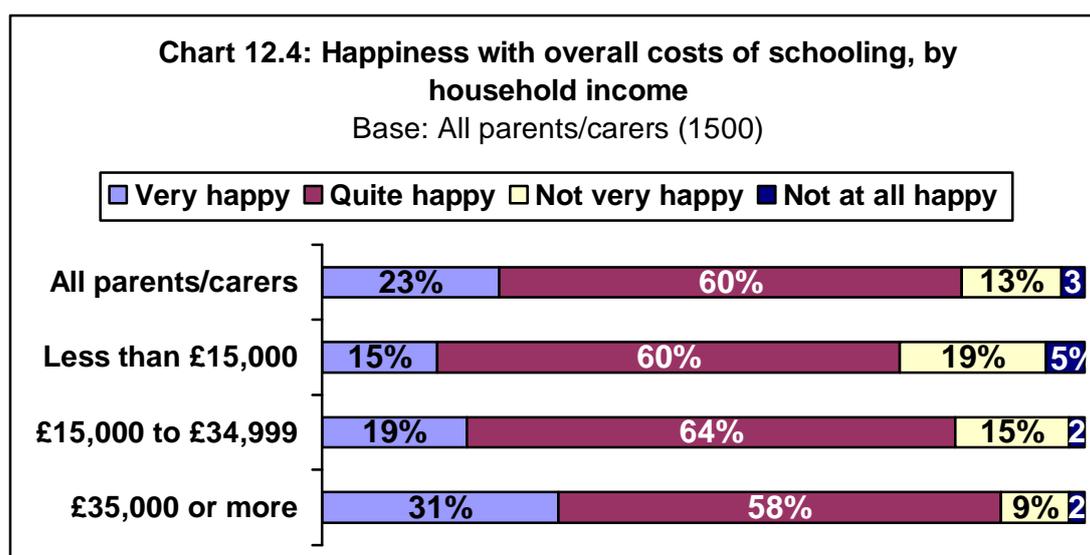
Opinions were also affected by the number of children aged 5 to 16 in the household who attended maintained school. Amongst parents/carers with just one child at maintained school, 46 per cent sometimes felt pressured to contribute to school trips, but this figure rose to 54 per cent amongst those with two children and 56 per cent amongst those with three or more children at maintained school.

Results were mostly similar for primary and secondary schools, although parents/carers of primary schoolchildren were a little more likely to ‘disagree a lot’ (i.e. *not* feel pressured to contribute) than parents/carers of secondary schoolchildren (27 per cent compared with 22 per cent).

12.4 Attitude towards overall costs

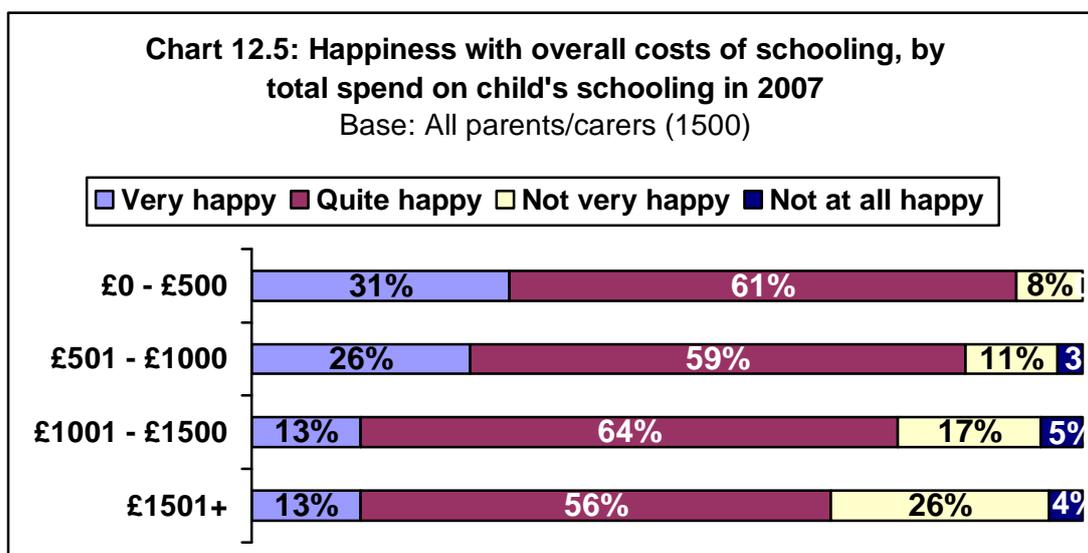
When asked about how happy they were with all the costs associated with sending their child to maintained school 23 per cent of parents/carers said they were very happy, 60 per cent were quite happy, 13 per cent were not very happy, and 3 per cent were not at all happy.

Parents’/carers’ happiness with the overall cost of schooling varied with household income. As would be expected, people with higher incomes were happier than those with lower incomes, as shown in chart 12.4.



Happiness also varied with the total amount parents/carers had spent on their child’s schooling in 2007: over 90 per cent of those who had spent less than £500 were

happy, compared with 69 per cent of those who had spent over £1,500. Chart 12.5 shows these results in more detail.



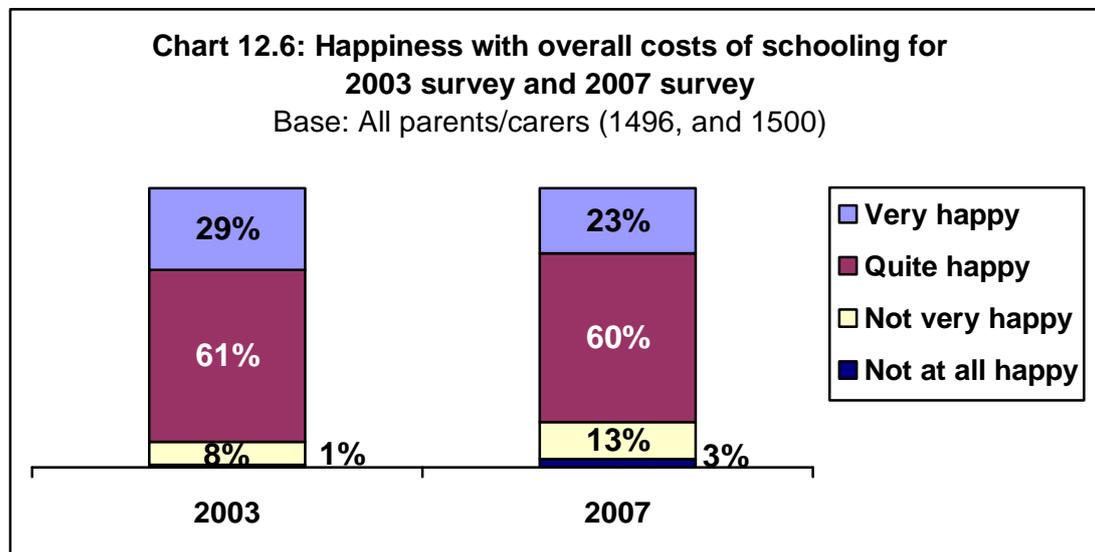
Parents/carers of secondary schoolchildren were less happy with the overall costs of schooling than parents/carers of primary schoolchildren, and in particular parents/carers of those in Year 7 were least happy. This may reflect the fact that costs are higher at secondary school than primary school, and parents/carers whose children have just started secondary school are likely to have noticed an increase in costs. Table 12.2 shows results broken down by school type, and also for parents/carers of children in Year 7.

Table 12.2: Happiness with overall costs of schooling, by school type/year
Base: All parents/carers (1,500)

	Primary (n=866) %	Secondary (n=634) %	Year 7 (n=143) %
Very happy	27	18	13
Quite happy	59	61	64
Not very happy	11	16	19
Not at all happy	2	4	3

Where respondents had three or more children aged 5 to 16 at maintained school they tended to be less happy: 21 per cent of this group were unhappy compared with 15 per cent of those with one or two children at maintained school.

Happiness with the overall costs of schooling had dropped a little since the 2003 survey. This may be a result of the overall costs of schooling increasing slightly since the previous survey (as shown in section 2.5). Chart 12.6 shows the results for 2007 against the results for 2003.



12.5 Ease of meeting costs

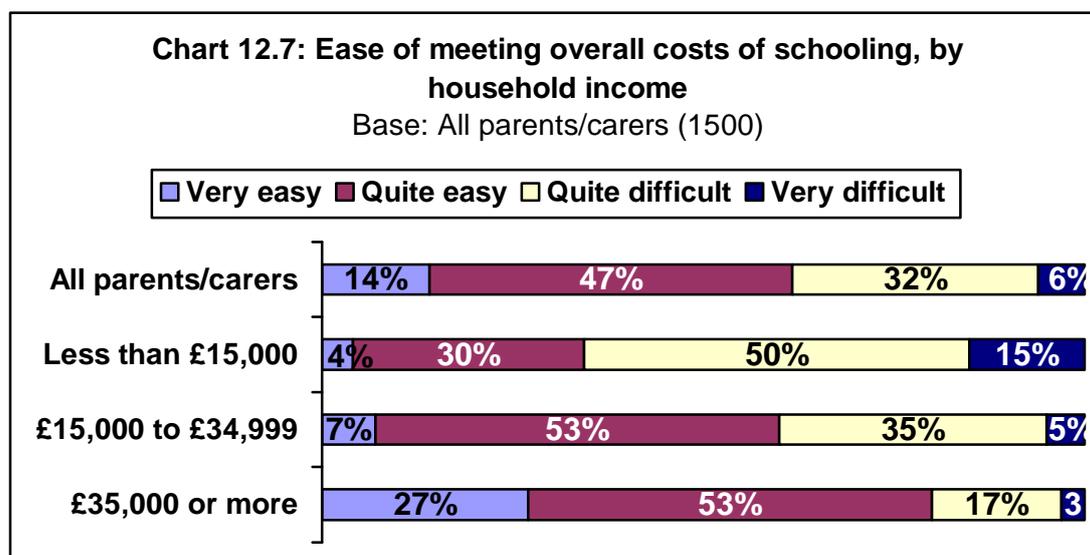
Overall, 14 per cent of parents/carers said they found it very easy for their family to meet the costs associated with their child's schooling, 47 per cent found it quite easy, 32 per cent found it quite difficult, and 6 per cent found it very difficult.

As shown in section 12.4, 83 per cent of parents/carers were at least quite happy with the cost of schooling, and yet only 61 per cent found it at least quite easy to meet these costs. This means there was a notable proportion of respondents who were reasonably happy with the cost of sending their child to maintained school, despite the fact that they have difficulty meeting the costs.

There were various subgroups of parents/carers who generally found it easier to meet the costs of their child's schooling:

- Those with higher incomes (and, related to this, those with higher social grades);
- Those with fewer children aged 5 to 16 at maintained school;
- Those whose total spend on their child's schooling in 2007 was lower; and
- Parents/carers of primary schoolchildren.

Of these, by far the biggest difference related to income. Chart 12.7 shows respondents' answers to this question, broken down by household income.



In particular, low income families (those with gross annual incomes of less than £15,000) who were not working were most likely to say they found it very difficult to meet the costs of their child's schooling: 23 per cent of this group found it very difficult, whilst the figure was only 11 per cent amongst low income families who were working⁴³.

Table 12.3 illustrates additional subgroup differences. As this table shows parents/carers of secondary schoolchildren were more likely to find it difficult to meet the costs of schooling as were parents/carers with more children at maintained schools, and those who had spent more on their child in 2007.

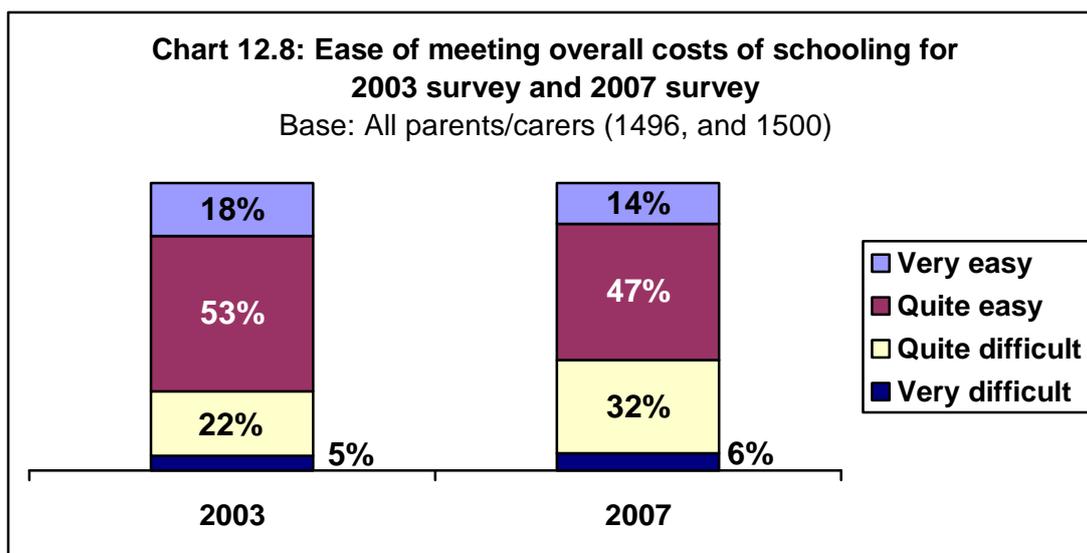
⁴³ Where the chief income earner in the household was working either full time or part time.

Table 12.3: Ease of meeting overall costs of schooling, by school type, number of children at maintained school and total amount spent on child's schooling in 2007

Base: All parents/carers (1500)

	Easy	Difficult
All parents/carers (n=1500)	61	38
School stage		
Primary (n=866)	67	34
Secondary (n=634)	56	44
Number of children in household at maintained school		
1 or 2 (n=1322)	64	36
3 or more (n=178)	48	52
Total amount spent on child's schooling in 2007		
£0 - £500 (n=258)	72	28
£501 - £1000 (n=807)	66	34
£1001 - £1500 (n=282)	49	51
£1501 or more (n=153)	46	54

Comparing the results in 2003 and 2007, parents/carers found it a little harder to meet the costs associated with their child's schooling. Again, this may be a result of the increase in total costs since the 2003 survey (as shown in section 2.5). Chart 12.8 shows the results from the two years.



This reduction in the ease of meeting costs was fairly uniform across all income levels. The proportion of parents/carers saying it was very or quite easy to meet these costs dropped from 44 per cent in 2003 to 34 per cent in 2007 amongst families with incomes of less than £15,000. For those with incomes of £15,000 to £34,999 there was a drop from 78 per cent to 60 per cent in 2007, and for families with incomes of £35,000 or more 80 per cent found it very or quite easy to meet costs in 2007 compared with 92 per cent in 2003.

12.6 Awareness of assistance

All parents/carers were asked if they were aware of any assistance available from their child's school to help with any of the costs covered by the survey. One in five (20 per cent) were aware of assistance available. Responses were similar for primary and secondary schools.

Awareness of assistance was lower amongst households with lower incomes, who themselves would benefit most from such assistance. Amongst parents/carers with household incomes of less than £15,000 per year, 16 per cent were aware of assistance, and the figure was 17 per cent amongst those with incomes of £15,000 to £34,999. This compared with 25 per cent of parents/carers with household incomes of £35,000 or more.

Parents/carers mentioned a variety of *specific* areas in which assistance was available:

- School trips – 39 per cent
- School meals – 30 per cent
- School uniform – 21 per cent

- School bus/transport – 6 per cent
- Music tuition/instruments – 3 per cent

Other respondents gave more *general* answers: 15 per cent said the school would help if parents/carers asked for assistance; 4 per cent said it was possible to pay for things in instalments; 4 per cent mentioned that financial assistance was available; 2 per cent said a bursary was available; and 1 per cent said equipment could be borrowed.

Schools survey

Schools were asked specifically about financial help available with buying school uniform and PE kit. These findings are reported in detail in section 3.5, but to recap:

- 15 per cent of primary schools and 36 per cent of secondary schools said assistance was available from the school fund with school uniform costs
- Nine per cent of primary schools and 29 per cent of secondary schools said assistance was available from the school fund with PE kit costs
- 28 per cent of primary schools and 46 per cent of secondary schools said assistance was available from the Local Authority with school uniform costs
- 16 per cent of primary schools and 31 per cent of secondary schools said assistance was available from the Local Authority with PE kit costs
- Six per cent of primary schools and 5 per cent of secondary schools said assistance was available from Charity with school uniform costs
- Four per cent of primary schools and 5 per cent of secondary schools said assistance was available from Charity with PE kit costs

Schools were also asked more generally about the provision of financial assistance for parents/carers who struggle to meet any of the costs associated with schooling. Firstly they were asked whether assistance was available, and then whether it was publicised, and how many children received that form of assistance.

Table 12.4 shows, for both primary and secondary schools, the proportion of schools which responded that help was available. As the table shows, the school fund was the most common source of financial assistance offered (in 71 per cent of primary schools and 86 per cent of secondary schools). Other forms of financial assistance were less common.

There have been no statistically significant changes in the proportions of schools saying these types of financial assistance are available since the 2003 survey.

Table 12.4 : Sources of assistance for costs of schooling available to parents/carers

Base = All responding schools (208)

	Primary (n=147)	Secondary (n=61)
	% where Available	% where Available
School fund	71	86
Local Authority	12	15
Charity	17	29
Other sources	10	6

Although a fairly high proportion of schools offered assistance from the school fund, only around a third of the schools which offered this assistance publicised the offer. This lack of publicity may explain why only 20 per cent of parents/carers were aware of any financial assistance, despite results from the schools survey suggesting that most schools offered assistance.

Where other forms of assistance existed they were generally publicised in around half of cases.

The small base sizes make it difficult to conduct further analysis of the number of children receiving assistance, although assistance from the school fund can be examined further.

The number of children receiving assistance from the school fund varied greatly from none to 100, but averaged eight children in primary schools and 12 children in secondary schools.

12.7 Key driver analysis

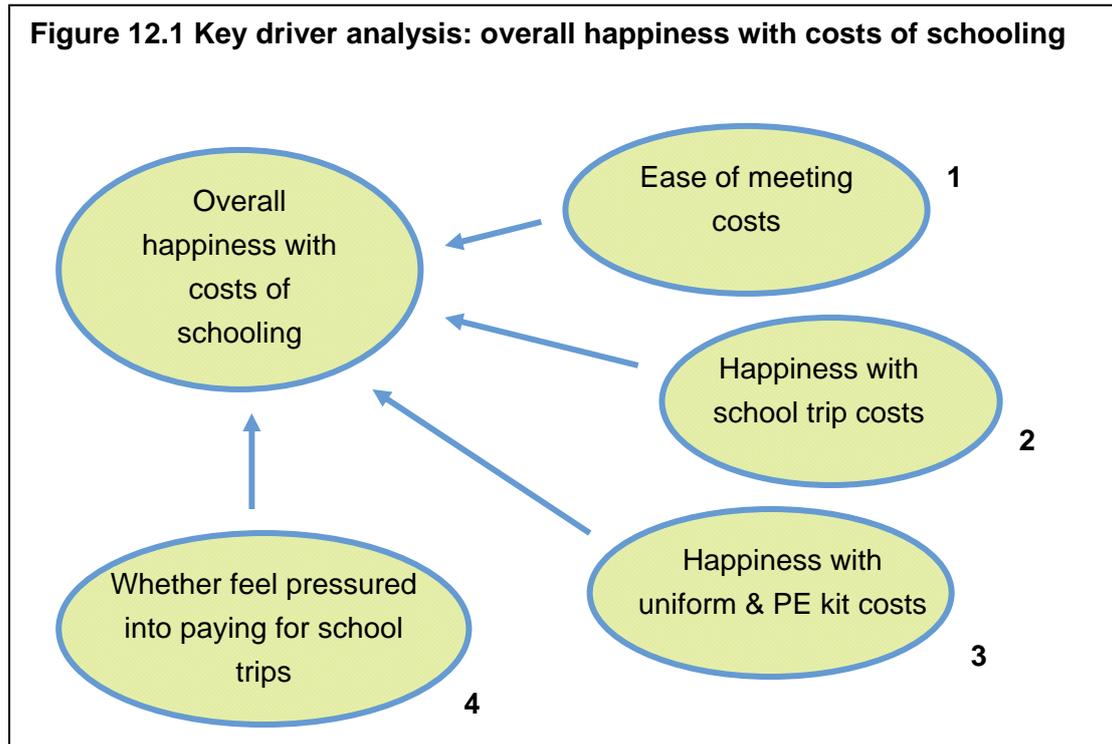
In order to probe more fully into the different factors affecting overall happiness with the cost of schooling, multiple linear regression (also known as 'key driver analysis') was used. More details of this technique are provided in appendix D.

Multiple linear regression was used to try to establish what were the key drivers in terms of overall happiness with the costs of schooling i.e. establishing which type of costs or factors had most influence on parents'/carers' overall happiness with the costs of schooling (taken from question 70).

Q70 Taking everything we have talked about into account, how happy are you with the costs associated with sending (name) to state school? Are you...?

Very happy	1
Quite happy	2
Not very happy	3
Not at all happy	4

Figure 12.1 shows the factors that were most likely to influence the respondent's answer to the overall happiness question – i.e. the key drivers of happiness with the costs of schooling.



How easy parents/carers found meeting the costs involved emerged as the biggest driver in terms of overall happiness with the costs of schooling. Happiness with the costs of school trips was the next most important factor, followed by happiness with the costs of school uniform and PE kit. Agreement with the statement “I sometimes feel pressurised into contributing to the cost of school trips” also emerged as a key driver (parents/carers who disagreed with this statement were more likely to be happy with the overall costs), although this had the least effect of the key drivers.

Other factors such as whether parents/carers had to provide class materials and stationery items played some part too, but these were not key drivers.

These results are in line with a similar key driver analysis that was applied to the 2003 cost of schooling survey.

The factors that influenced respondents' answers concerning the ease of being able to meet all the costs were also examined more closely⁴⁴. The following list shows which factors had the greatest influence (in rank order):

- Household income
- Happiness with the cost of uniform and PE kit
- Happiness with the cost of school trips
- Whether feel pressured into paying for school trips

Predictably household income was the largest driver, followed by the two specific cost areas, and whether respondents felt pressured into paying for school trips.

⁴⁴ Please note, this analysis does not imply causation e.g. it does not suggest that being happy with the costs of uniform and PE kit makes respondents more able to afford them, rather it shows that people who were happy with the costs of these things were more likely to say they could easily meet costs, although the link between these two questions is not as strong as the link between household income and the ease of meeting costs.

13 Role of children in passing on requests for contributions to parents/carers

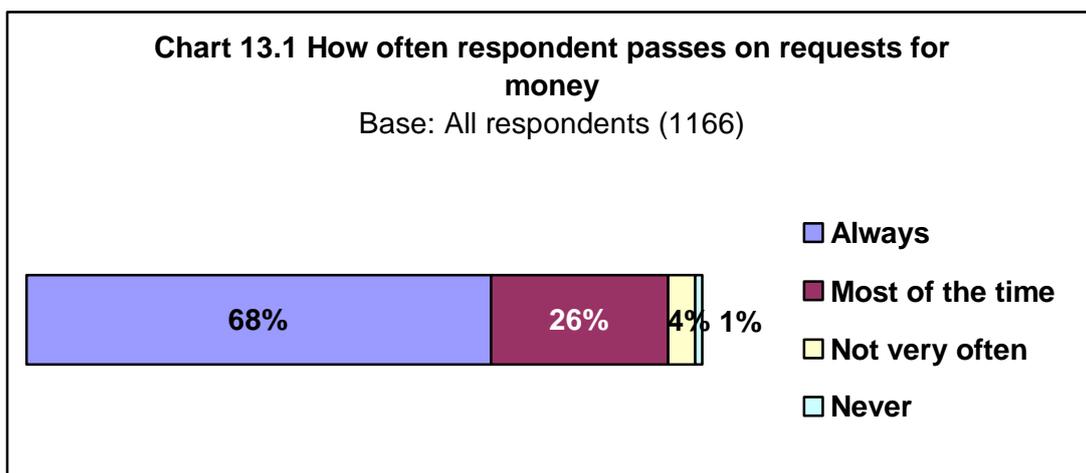
The costs of schooling covered in the telephone survey with parents/carers were concerned only with the costs they knew they had been asked to pay for. However, the study also investigated the role children play in mediating what parents/carers pay or know about in terms of costs asked for by schools.

As with the 2003 survey, the approach taken was to ask children themselves, in a separate survey using the BMRB Omnibus survey. BMRB runs a special *Youth Omnibus* interviewing children aged 7 to 19. A series of questions, which were similar to those from the 2003 survey, were added onto this to explore the issue.

Young people aged ten to 16 were surveyed to find out the extent children act as mediators in terms of what information is passed to parents/carers from schools. A total of 1,166 young people were interviewed. Interviews were carried out in-home, using Computer Assisted Personal Interviewing (CAPI).

13.1 Passing on requests for contributions

Children were asked how often they pass on letters to their parents/carers from schools requesting money for activities such as school trips or parties. Just over two thirds of children (68 per cent) said they always passed on letters from the school, while a quarter (26 per cent) said they pass on letters most of the time; see Chart 13.1 for more details.



Respondents aged 16 were more likely than their younger counterparts to say they passed on requests for money most of the time (32 per cent compared with 24 per cent of 10-15 year olds) but were less likely to say they always passed these on (58 per cent compared with 70 per cent). Females were more likely than males to always pass on requests (71 per cent versus 65 per cent). There were no differences based

on household income. However, looking at social grade, young people in band E were more likely than their counterparts in band A to say they do not pass requests on very often / they never pass them on (10 per cent versus 4 per cent).

The findings were very similar to those from 2003, where 64 per cent of young people said they always passed on school requests for money to their parents/carers and 24 per cent said they did so most of the time.

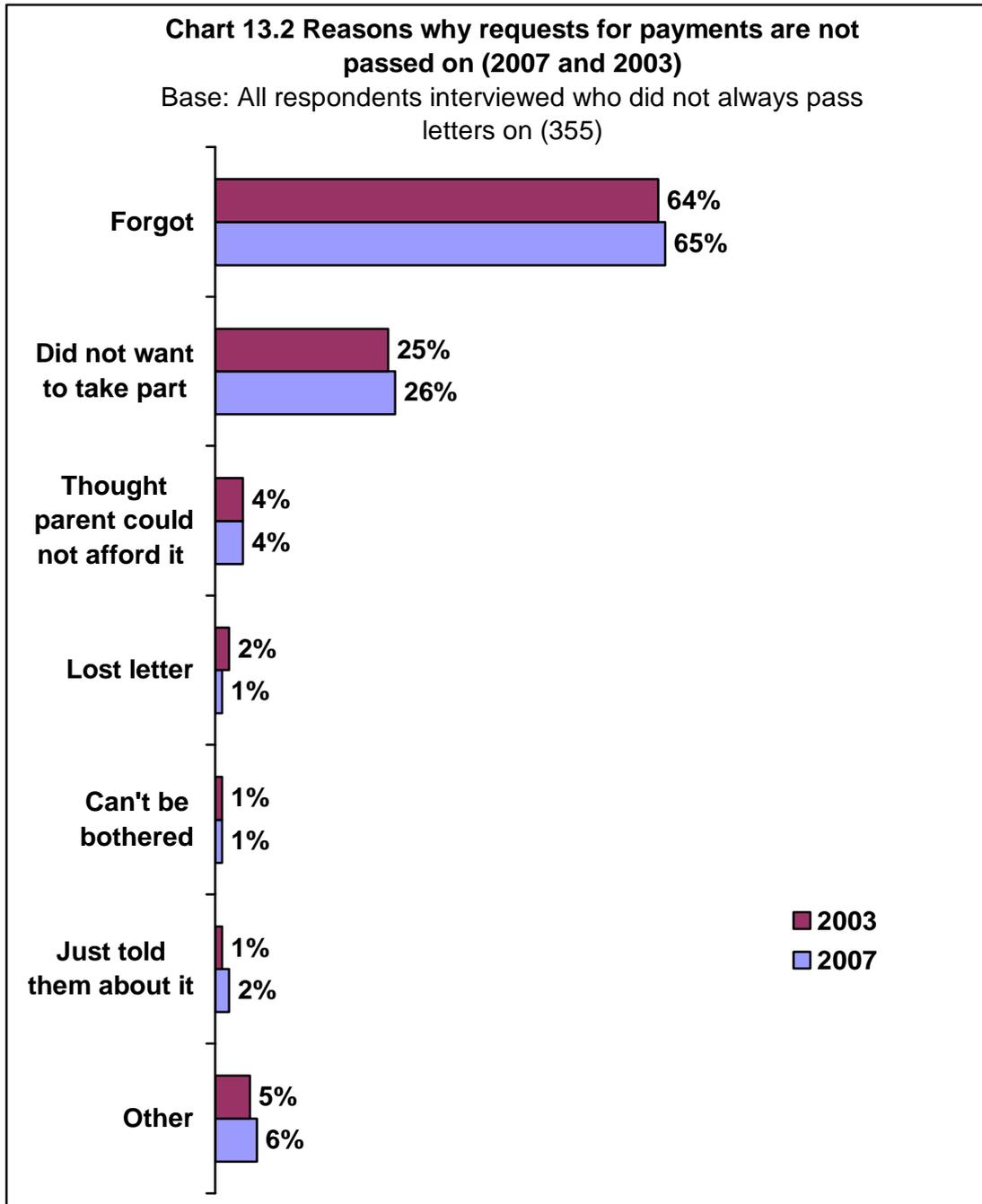
13.2 Why requests for contribution are not passed on to parents/carers

Respondents who said they did not always pass on requests for payments to parents/carers were then asked why this was the case. Respondents could give more than one response.

Two thirds of children (65 per cent) said that they had simply forgotten, while a quarter (26 per cent) said they had not handed over letters because they had not wanted to go on the trip or take part in the activity. Just 4 per cent said they thought their parents/carers would not be able to afford it.

Respondents from lower income households were more likely than those from higher income households to say they did not pass on requests for money because they thought their parents/carers could not afford it (7 per cent where annual household income was less than £15,000 compared with 1 per cent for those with an annual income of £15,000 or more).

Chart 13.2 shows the responses given in 2007 as well as those from 2003 and demonstrates the close similarity between the two surveys in the responses provided.



13.3 The consequences if parents/carers could not afford to contribute

All respondents were asked what would happen if the school asked their parents/carers for a contribution they could not afford. The question was unprompted and a number of responses were provided. The most common response was that this situation had never occurred (38 per cent); see table 13.1 for more details (2003 responses in brackets where available).

Table 13.1: Consequences if parents/carers could not afford to contribute 2007 (2003 figures in brackets)

Base: All children respondents (1,166)

	Total %
It's never happened	38 (28)
I would not mind	19
I would ask/ tell my parents about it	18
I would feel unhappy or left out	17
I would not do the activity/I would not be able to do the activity	13
I would say that I didn't want to do the activity	8 (8)
The school would say it's voluntary/cover the cost	7 (3)
I would not ask/tell my parents about it	7 (6)
I would feel disappointed	5
We would tell the school/teachers that we couldn't afford it	5 (4)

Useful findings to draw from this are that one in six (17 per cent) would feel unhappy or left out, while 8 per cent would say they did not want to do the activity and 7 per cent would not ask or tell their parents/carers about it. It is interesting that only 7 per cent of young people thought their school would say the contribution was voluntary/the school would cover the cost if their parents/carers could not afford it.

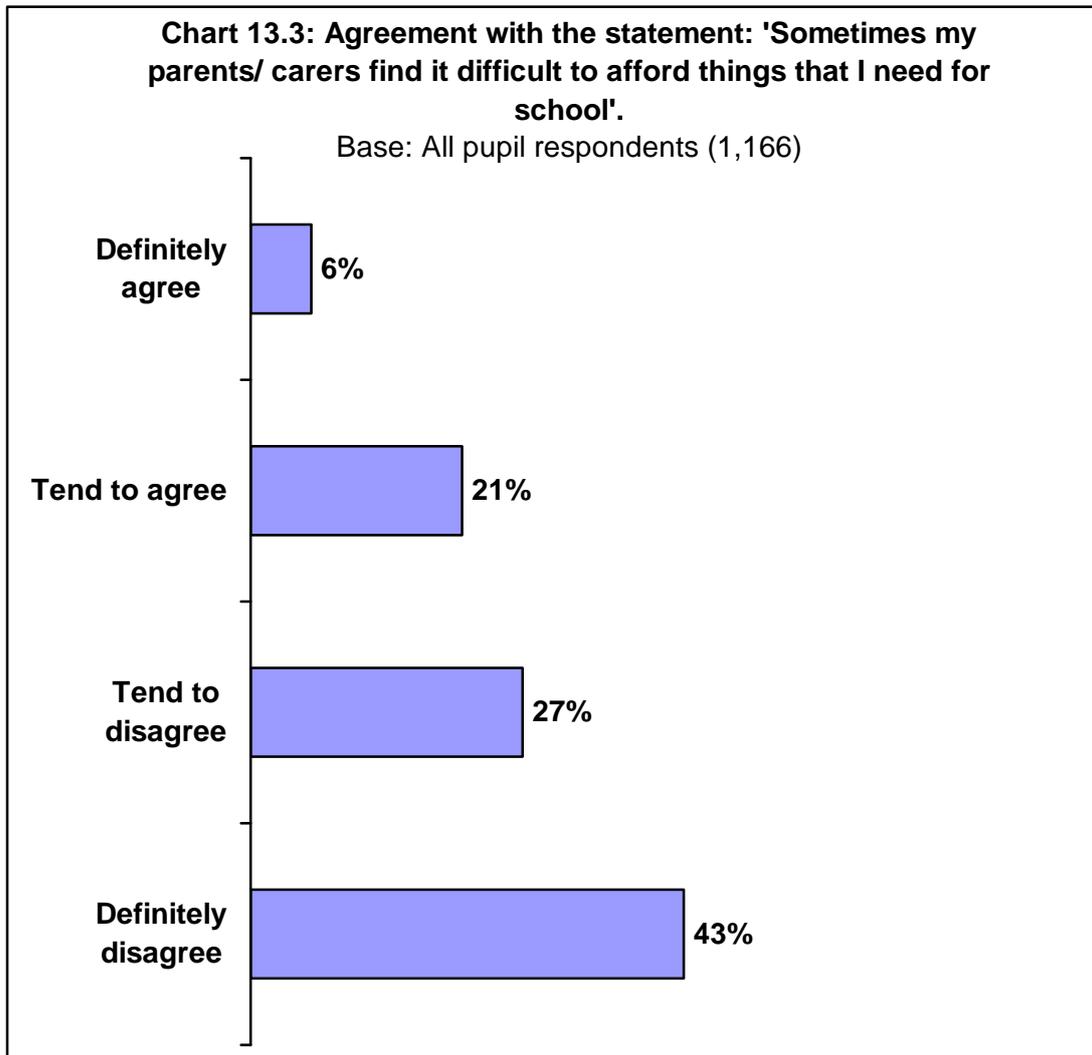
Young people in social grade A were most likely to say this situation has never occurred (42 per cent), while those in social grade E were least likely (30 per cent).

13.4 Child perception of parents/carers' ability to afford school items

Young people were asked for their level of agreement with the statement 'Sometimes my parents/carers find it difficult to afford things that I need for school'. Seven in ten respondents (71 per cent) disagreed with this statement. See Chart 13.3 for more details.

Children from households with an income of less than £15,000 a year were more likely to agree with this statement than those from households earning £15,000 or more (42 per cent compared with 21 per cent). Additionally, children in households with social grades C2, D or E were more likely than those in households with social

grades A, B or C1 to agree with the statement (36 per cent and 13 per cent respectively).



In 2003 the statement was worded slightly differently and did not refer specifically to school items (the statement read “sometimes my parents find it difficult to afford things that we need”). Therefore, caution should be taken when making comparisons between the two years. More respondents in 2007 disagreed with the statement that was read to them than was the case in 2003: 70 per cent (2007) versus 57 per cent (2003).

14 Literature review

This literature review presents findings from recent research studies that are relevant to the Cost of Schooling Survey. As well as providing complementary evidence on similar issues, these studies give an additional dimension, through coverage of additional respondent groups (e.g. local authorities and retail outlets). It is important to note the timing of these studies: some pre-date the recently published guidance on school uniforms and the 2007 School Admissions Code.

Studies included

Adding Up (2007): The Citizens Advice Bureau undertook a survey of parents, guardians and carers in England and Wales in June-July 2007. The survey aimed to find out whether schools' practices complied with the 2007 School Admissions Code, in relation to limiting the costs of school uniform and trips. The survey was run on the Citizens Advice Bureau public website, www.adviceguide.org.uk, and received 1,089 responses from parents/carers. The report acknowledges that the respondents were "self-selecting". In addition, many parents/carers visiting the Citizens Advice Bureau website will be on a low income or experiencing financial difficulties; the sample is therefore likely to be less representative of all parents/carers than the Cost of Schooling survey. Nevertheless, the survey provides a valuable insight into the views and experiences of parents/carers.

School uniforms research (2006): The Office of Fair Trading (OFT) undertook a fact-finding review to examine whether the arrangements between specialist retailers and maintained schools for uniforms result in detriment to parents/carers and, if detriment exists, whether it impacts disproportionately on poorer families. A self-completion questionnaire was sent to 9,151 schools (5000 primary and 4151 secondary). 2,110 questionnaires were returned giving a response rate of 23 per cent. In addition, mystery shopping was conducted to obtain prices from retailers (both those who had an exclusive contract with a school and other uniform retailers). This enabled a comparison of prices charged. The OFT's remit covers the UK so the research includes information from schools in England, Scotland, Wales and Northern Ireland. Although the response rate in the survey of schools was low, the use of mystery shopping with retailers adds a useful dimension to the research evidence.

School Uniform Update (2004 and 2007): Surveys undertaken by the Citizens Advice Bureau, to examine the LA provision of financial assistance with school clothing. In the 2004 survey, all 172 LAs were contacted (a response rate of 100 per cent); details from the latter survey are not available. This research is useful in obtaining detailed information from the full population of LAs.

School Sums (2008): Norwich Union commissioned Tickbox.net to interview 1,009 parents/carers of school age children in the UK in August 2008; further details are not available. The survey was also conducted in 2006.

School Meals (2006): UNISON commissioned the Labour Research Department to carry out a survey of LAs to update information that was collected in a similar survey in 2001. The survey looks at the price of school meals and subsidies for the school meals service, as well as other related issues. There were 130 responses to the survey, representing 64% of local education authorities in England, Scotland and Wales. As with the School Uniform Update surveys, this research is useful in obtaining data directly from LAs.

Annual survey of take up of school meals in England (2008): The School Food Trust carried out a survey amongst local authorities about catering services in schools. All 150 LAs in England were approached to take part in the survey and 109 did respond, equating to a 73 per cent response rate. This is the third such survey the SFT has undertaken, with previous surveys taking place in 2006 and 2007.

Listening to Children (2003): The Listening to Children study was conducted by the University of Bath and funded by the Economic and Social Research Council. This study involved in-depth interviews with a group of 40 children and young people who were living in families in receipt of Income Support, and were from two different family types: lone-parent families, and couple families where there was an adult or a child with a disability. The children ranged in age from 10 to 17 years. Although less recent than the other studies, this research provides an in-depth insight into the concerns of children and young people.

Expenditure and Food Survey (2006): The Office for National Statistics conducts an annual survey looking at household spending. For the 2006 survey 6,650 households were surveyed with a response rate of 55%. This survey looks at a wide range of items that households spend money on, and includes school travel, school meals and payments for school trips and other ad hoc expenditure. As only a proportion of the households included in the survey have school age children, and not all households with school age children were spending anything on the areas of cost relating to school, the base sizes are generally quite small for looking at these results.

Total costs

Norwich Union's 'School Sums' index found that the total average cost of sending a child to maintained school - from the age of five through to age 16 - was just under £16,000 in 2008, compared with just over £14,000 in 2006. In the 2008 survey, the top three most expensive components of a child's schooling were found to be:

- 1) Transport, costing UK parents/carers £366 per child per year, with a third of children being taken to school by car;
- 2) Food – parents/carers spent £358 per child per year on lunches, with nearly twice as much spent each week on school dinners compared with packed lunches;
- 3) PE kit, costing UK parents/carers £169 per child per year.

The results of the Norwich Union survey vary considerably from those found by the 2007 Cost of Schooling survey. The average total cost per year was £1449 according to 'School Sums' compared with £900 found by the DCSF research. It is possible that (at least part of this difference) could be down to the 'School Sums' survey interviewing far more parents/carers of secondary schoolchildren, for whom costs are higher; however, no information is available on the profile of respondents to the survey.

The Norwich Union research also found that 70 per cent of parents/carers were concerned about how they would afford all the costs of sending their children to school, and some families were getting into debt to afford these costs: 19 per cent used credit cards and 10 per cent used overdrafts to pay the school bill, while 14 per cent dipped into their savings.

In the 'Adding Up' research, the majority of parents/carers (72 per cent of primary school parents/carers and 79 per cent of secondary school parents/carers) found it difficult to meet all of the costs discussed in the survey. These findings differ from the 2007 Cost of Schooling survey, in which 38 per cent (33 per cent of primary school parents/carers and 44 per cent of secondary school parents/carers) said they found it difficult to meet all costs. As noted above, this is likely to be due to the nature of the sample in the 'Adding Up' survey, which may over-represent parents/carers on a low income.

In the 'Adding Up' research, 8 per cent indicated that costs associated with schooling had affected their choice of school.

Uniform costs

A number of the studies included coverage of uniform costs. The OFT review found that uniforms were more likely to be compulsory in schools in England and Northern Ireland (84 per cent and 81 per cent respectively) compared with Scotland (75 per cent) and Wales (64 per cent). In England, Foundation and Voluntary Aided schools were more likely to insist on uniforms (94 per cent and 91 per cent) than Community schools (80 per cent).

In the OFT research, 84 per cent of schools with a uniform stipulated that some uniform items had to be bought from either a designated retailer or the school itself

(with little difference between the proportions of primary and secondary schools - 83 and 89 per cent respectively). Such restrictions were more likely to be imposed in Scotland (91 per cent) than in other countries of the UK (84 per cent or less). In England, Foundation-status schools were most likely to restrict choice of supplier (90 per cent, compared with 82 per cent of Community schools). The 2007 Cost of Schooling survey found that 66 per cent of schools in England with a uniform required at least one uniform item to be bought from a specific supplier. This may indicate a real decrease since the 2006 OFT research, as a result of the DCSF School Admissions Code which came into force in February 2007. However, it should be noted that the schools survey undertaken as part of the DCSF research achieved a low response rate and a relatively small sample size, and these results therefore need to be treated with caution.

In the 'Adding Up' survey, 87 per cent of parents/carers said they were required to buy uniform items from a specialist supplier. Of those, 86 per cent of parents/carers of secondary schoolchildren and 56 per cent of parents/carers of primary schoolchildren needed to purchase at least three items. This survey reported a higher figure than in the 2007 Cost of Schooling survey (in which 78 per cent said they had to buy some items from the school or a specialist supplier – see section 3.3 for details).

The OFT review also examined the cost of compulsory uniform items at different retail outlets. It found that 'exclusive' outlets were on average 23 per cent more expensive than school uniform retailers generally. The average difference for primary schools was 37 per cent and for secondary schools was 18 per cent. 'Exclusive' outlets were even more expensive when compared with prices charged in supermarkets: a 150 per cent difference overall (108 per cent primary school items and 173 per cent secondary school items).

This means that (at the time of the OFT research in 2006) each parent of a child at a primary school which restricted the supply of uniform paid on average approximately £4.50 more each year than where the school's uniform items were purchasable from uniform retailers generally; the corresponding figure for secondary schools was £10.70. Had all of the uniform items been available from supermarkets instead, the savings to parents/carers would have been greater, at £9 and £27, respectively, per annum.

The OFT review also reported that a third of schools operating exclusive contracts with retailers reported benefiting financially from them. Primary schools responding to the OFT survey said they made on average £200 per annum from each exclusive contract with a retailer or £220 per annum whenever they supplied uniforms themselves. The corresponding figures for secondary schools were £1,304 and £1,368 respectively.

In the 'Adding Up' survey, three-quarters of parents/carers of secondary schoolchildren and two-thirds of parents/carers of primary schoolchildren found it difficult to meet the costs of school uniform. In addition, 73 per cent of secondary school respondents and 48 per cent of primary school respondents felt that the school uniform was not good value for money. Many respondents highlighted their frustrations at the poor quality of the uniform and how well it lasted, especially when it needed to be purchased from a specialist shop.

The 'Adding Up' research also found that parents'/carers' frustrations were compounded by the following factors:

- Lack of clarity around which items are compulsory. Parents/carers reported being asked to purchase items which later turned out to be unnecessary.
- Changes to the school uniform, sometimes frequent, and often with insufficient notice or explanation.
- Specific uniform items for different school years.

The same research looked at complaints about school uniform costs: 17 per cent of primary school parents/carers and 31 per cent of secondary school parents/carers said they had complained to the school or local authority. Comments from the survey suggest that parents/carers may not have known who to complain to, and that if they did, many found that their complaints were not taken seriously.

Examples of good practice in schools were also identified by the 'Adding Up' research, such as schools allowing parents/carers to sew badges on to 'off the peg' clothing, if applicable, and schools having a stock of branded uniform available to borrow for special events, such as sport matches

Cost of school trips

The 'Listening to Children' study found that a particular area of disadvantage identified by children was participation in school trips. These were increasingly seen as playing an important role in enhancing the school curriculum, but over half of the parents/carers of children in the study were unable to afford to send their child on school trips with any regularity. As a result, some children felt excluded from the opportunities that many of their peers were enjoying.

In 'Adding Up', 76 per cent of parents/carers of secondary schoolchildren and 63 per cent of parents/carers of primary schoolchildren found it difficult to meet the cost of school trips. Specifically, parents/carers sometimes felt that insufficient notice was given; around two in five parents/carers felt they hadn't been given enough notice to budget for trips.

'Adding Up' also found that just one in four parents/carers thought it was clear that families on a low income could be exempt from some or all of the cost of the trip. Even where the option not to pay was clearly stated, parents/carers commented that it was necessary to make an appointment with the school to discuss why they were not able to pay (which is contrary to the guidance in the School Admissions Code).

Good practice identified in the 'Adding Up' research included instances where trips included payment plans, long notice periods, considerate wording of letters home, and financial assistance for parents/carers from school bodies.

The Expenditure and Food Survey (EFS) did not look at school trips alone, but looked at household spending on school trips and other adhoc expenditure. This was, on average £9.44 a week, or £491 a year for nursery and primary schools, and £16.84 a week or £876 a year for secondary schools. EFS also looked at the amount households were spending on school travel, which was £4.23 a week on average.

School meals

According to the School Trust Fund's 'Take up of school meals' research the average price of a primary school meal in 2007-2008 was £1.67, a slight increase on the average prices in 2006-2007 (£1.63) and 2005-2006 (£1.54). For secondary schools the average price of a school meal was £1.77 in 2007-2008, a slight increase from 2006-2007 (£1.72) and 2005-2006 (£1.62). These increases are roughly inline with retail price inflation.

In the 2007 Cost of Schooling survey, parents/carers whose children usually had a school meal said they were spending £1.75 a day for primary school meals and £2.51 a day for secondary school meals. For secondary schools this is significantly higher than the SFT survey suggests. However, the schools survey conducted as part of the cost of schooling survey found school meals in both primary schools and secondary schools cost £1.81, which is similar to the SFT research.

The 'Take up of school meals' survey also found that in primary schools 43 per cent of children had a school meal, and in secondary schools the figure was 38 per cent. These results are slightly different to the 2007 Cost of Schooling survey which found 35 per cent of parents/carers of primary schoolchildren said their child had a school meal, and 41 per cent of secondary school parents/carers said their child had a school meal.

The 'School Meals' survey found that the proportion of authorities saying they provided a subsidy to the school meals service had fallen to 48 per cent in 2005, from 59 per cent in 2002 and 62 per cent in 1995. In the latest survey, the use of subsidies appeared also to have a greater impact on the price of school meals than before. In 1995, primary and secondary school meals were on average 4p cheaper in

authorities that said they subsidised the service; in the 2005 survey this difference had risen to 11p.

ONS's Expenditure and Food Survey (EFS) found that, for households that were spending money on school meals, the average amount spent was £5.02 per week, or around £1 a day.

Help and support

The Citizens Advice Bureau's 'School Uniform' research reported a drop in both the availability and value of local authority grant schemes: in 2007, 57 per cent of local authorities did not offer any uniform grant, compared with 42 per cent in 2004 and 30 per cent in 2001. Most local authorities offered their highest grant to children transferring to secondary school. In 2007 these grants ranged from £15 to £155.78. The average grant was £53.38 compared with £51.27 in 2004.

All LAs are free to set their own eligibility criteria for their grants, and the research found that these varied widely between and within different authorities. Some authorities, for example, limited eligibility to parents/carers who were in receipt of income support and income based jobseeker's allowance. Others included a variety of other benefits in their eligibility criteria, such as housing and council tax benefit, widowed parent's allowance and tax credits. Some LAs offered grants to asylum seekers.

The 'School Uniform' survey also asked whether LAs publicised their services, and what channels they used in order to do so. The survey found that after excluding those authorities that made grants in cases of exceptional hardship only, 70 per cent of LAs publicised their grants in some way. The remaining LAs relied on schools or word of mouth to inform parents/carers of the grant.

Those LAs that publicised their grants used a variety of means – local press, the Internet and leaflets and booklets sent out to schools, particularly admissions booklets that go out to parents/carers of children transferring to secondary school.

The 'School Uniform' survey also revealed a number of examples of good practice for ensuring high take-up by eligible parents/carers. These included identifying eligible parents/carers through an automatic check on those in receipt of housing and council tax benefit. In some areas, information on the scheme was included on application forms for housing and council tax benefit. In a number of LAs, school uniform grant eligibility was linked to eligibility for free school meals, and parents/carers could claim for both benefits at the same time.

There are other options available for parents/carers who cannot get help from the LA, including charities, the social fund, and schools themselves. In the 'School Uniform'

research many of the LAs that did not provide grants said that the schools in their area ran their own second hand stores where parents/carers could buy uniforms at a reduced price. A small number of LAs had allocated money for a uniform scheme to the schools themselves.

The OFT review reported that most schools with a uniform (80 per cent) claimed that parents/carers who could not afford to buy new uniform were offered at least one type of assistance (such as offering second hand uniforms at reduced or no cost, LA grants, financial assistance from the school or help from a local charity). Children at Scottish schools were offered it most (96 per cent) compared with 81 per cent of English children, 71 per cent of Welsh children and 56 per cent of Northern Irish children.

However, the 'school uniform research' revealed a very low level of knowledge amongst parents/carers about what help was available to them.

'Adding Up' identified good practice for making help available to families on a low income, including a hardship fund, a second hand uniform stall, and finally, a general attitude of the school towards ensuring that children from low income families are not excluded for financial reasons.

What happens when parents/carers are unable to pay

In 'Adding Up', four in five parents/carers of secondary schoolchildren and over half of parents/carers of primary schoolchildren were worried that their child would be disciplined as a result of not having the correct uniform. In addition, 58 per cent of secondary school respondents and 55 per cent of primary school respondents were also worried that their child would be bullied as a result of not having the correct uniform. Comments made by parents/carers also revealed high levels of distress caused by not being able to meet all of the demands for payment.

'Listening to Children' found that children felt they were experiencing considerable disadvantage within their schools, with many reporting feeling bullied, isolated and left out at critical stages of their academic careers. The costs of maintaining an adequate school profile and acquiring appropriate materials for examinations and school activities were described by many children as prohibitive. Of particular concern were children who were clearly excluding themselves from school activities. Disillusioned with the process, they did not take home letters asking for money for trips and other activities.

Summary

Previous research provides a lot of useful evidence on the cost of schooling, from a range of different perspectives. These studies indicate that the costs to

parents/carers can be considerable and appear to be increasing. The research also highlights the problems faced by parents/carers, as well as examples of good practice by schools in restricting costs and offering support. Some of these studies were conducted several years ago and, as previously outlined, there are issues with the methodology or clarity of reporting for some, which may mean the results are not entirely reliable. Therefore the 2007 Cost of Schooling Survey can build on these findings by providing an up-to-date picture, from a representative sample of parents/carers, and a sample of schools.

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Appendix A: Cost calculations

Parents/carers

This section outlines in more detail the methodology used for calculating costs for the different areas of expense using the data from the parents/carers survey.

School Uniform and PE kit

Parents/carers were first asked whether a particular item of uniform or PE kit was required. Then, for a maximum of four items (i.e. four items for school uniform and four for PE kit) they were asked what the cost per item was and how many they had bought in 2007. The overall cost for each item was then calculated by multiplying the number bought by the price for each case, and an average calculated for each item.

Clearly there are some limitations with this approach as it relies heavily on respondent recall of purchases over the previous 12 months. In this respect a diary approach might have achieved more accurate results, although this needs to be qualified by the length of time required to carry out this approach – essentially a full year would have been needed given the effect of the school year cycle on such expenditure – and the potential difficulty and costs involved in achieving high response rates. Time constraints on the project effectively dictated a telephone approach which, despite the reliance on ability to recall, is an efficient and effective way of collecting the data.

The fact that the interview length meant that each respondent was only asked for a maximum of four randomly chosen items also meant it was not possible to compile a complete picture of the expenditure of each parent/carer. To counter this, when the total annual spending on both uniform and PE kit was calculated, in cases where an item of uniform or PE kit was needed but no cost given (each respondent was asked the costs for a maximum of four items only) then an imputed cost was used - the mean cost for that item (based on all those who did answer the question). Whilst this approach is by no means flawless it did mean the most accurate data possible was obtained within the time and methodological constraints the survey had.

School Trips

Parents/carers were asked the price of the most recent school trip and the number of trips they were asked to pay for in 2007. For the total annual spending chapter, annual costs for school trips were calculated by taking the cost of the most recent trip and multiplying by the number of trips offered. The number of trips was actually a scaled question – 1,2,3, 4 or more. In order for the calculation to be made, a value was applied for each category (1 =1, 2 = 2, 3 = 3, 4 = more than 3). There may have been a few cases where children went on more than four trips but in these cases the

value given would have been four meaning this information could not be captured. This process was applied for both residential and day trips.

Class materials, swimming lessons, travel, meals

Throughout the parents/carers questionnaire, respondents were asked to give a cost of an item or contribution and then asked whether that figure represented a daily, weekly or termly (etc) amount. This type of questioning was used to cover:

- ⇒ Travel costs
- ⇒ School fund
- ⇒ School meals
- ⇒ Class materials
- ⇒ Swimming lessons

The questionnaire was structured to allow respondents to recall costs for different time periods. For example, for the costs of travel a parent may pay monthly, weekly, daily or per trip. In order to save time during the interview and to allow the most accurate information to be captured, respondents were given the option of giving answers in a way that fitted their recall – so if they paid for an item on a weekly basis, this was recorded and different payment intervals were resolved in the data processing stage. Each figure was then calculated back to the most appropriate time period for the specific area of cost comparison. Costs of class materials, swimming lessons and school fund were calculated to annual costs. Travel costs were calculated to weekly costs and school meals were calculated back to daily costs.

The exact formulae used to calculate these costs are outlined overleaf⁴⁵ (based on a school year of 195 days, 39 weeks, 11 months, six half-terms, or three terms).

⁴⁵ In the case of school fund, some respondents said the cost was a one off for whole of time spent at school. These costs were divided by five for secondary schools and six for primary schools (the number of years at school). For class materials and swimming lessons, some costs were given that the respondent said were costs per lesson, these costs were multiplied by 39 under the assumption that the relevant lesson would only take place once a week. In the case of costs of school travel some costs were given for a single trip. These costs were then multiplied by ten to obtain the corresponding weekly cost.

Annual costs calculation

Weekly	Multiply x 39
Monthly	Multiply x 11
Per half term	Multiply x 6
Per Term	Multiply x 3

Weekly calculation

Daily	Multiply x 5
Monthly	Divide x 4
Term	Divide x 12
Annual	Divide x 39

Daily calculation

Weekly	Divide x 5
Monthly	Divide x 20
Term	Divide x 60
Half term	Divide x 30
Yearly	Divide x 180

Capping of costs

Costs for class materials and swimming lessons were calculated to an annual total. This meant the cost assumptions made were based on money for class materials and swimming lessons being needed throughout the school year. Unfortunately time constraints with the questionnaire meant the exact period during which the lesson was taken by children could not be asked. There was the danger of costs being artificially inflated using this process as, for example, lessons may not take place every week for a complete year. Therefore, in order to minimise the chances of this, the recalculated costs paid for class materials and swimming lessons were capped at £225 per annum for every subject apart from Music, which was capped at £340. This reduced the chance of random outliers disproportionately skewing the mean value.

Travel and meal costs were also capped to reduce the chance of random outliers affecting the average score. Weekly travel costs were capped at £41; daily school meal costs were capped at £8.

These are the same caps used on 2003 data (adjusted for inflation).

The cost of the most recent school trip was capped at £1000.

All other costs for the remaining areas were not capped⁴⁶.

Total annual costs calculation

Total annual costs were calculated for each respondent by adding together the costs for every area of expense asked about in the survey. If nothing was paid for an area of cost (e.g. no school uniform needed or no school photographs paid for) then a value of 0 was used.

Because of time limitations with the questionnaire, not every cost was asked of each parent/carer. In cases where an item of uniform or PE kit was needed but no cost given (each respondent was asked the costs for a maximum of four items only) then the mean cost for that item (based on all those who did answer the question) was imputed.

In cases where an item or area of cost was needed but respondents did not know the exact price, the mean cost was imputed (again, based on all those who did answer the question). For example, if a parent/carer said they contributed to charity but could not remember the cost, the mean cost was used.

Four areas of cost were asked of a split sample due to time constraints - costs for class materials (including swimming lessons), school photographs, costs of charity contributions and costs of 'other' contributions (such as raffles and school parties). To calculate the total annual costs of these areas for each respondent, an average cost was applied for those parents/carers not asked the questions. The average cost used in this instance was based on all those answering the question and included those people saying they spent nothing. The average amount used for the calculation of the total annual cost therefore differed in this respect to the average costs used in the other sections of the report, as the costs used in those sections of the report were based only on those who had actually needed to pay something.

Inflation

Throughout the report costs from the 2007 survey are compared to costs from the 2003 survey. In order to do this, costs from the 2003 survey have been adjusted to account for inflation.

There are several available measures of inflation that were considered: the Consumer Prices Index (CPI), the Retail Prices Index (RPI), and the GDP Deflator. It

⁴⁶ Although school uniform and PE kit costs were not capped, extreme outliers (for example a case where one pair of shoes were reported to cost £1000) were removed from the data, and mean values were applied in such cases.

was decided that using the RPI would be most appropriate. The RPI tracks changes in the price of a basket of goods and services, taking a large sample of retail goods including food, tobacco, household goods, transport fares, motoring costs and clothing. The RPI is therefore best used as a measure of inflation when the monetary amount is the cost or price of a simple product, such as a loaf of bread or a pair of shoes.

Taking 2003 as the base year, the RPI for subsequent years is:

2004 – 2.89%

2005 – 2.98%

2006 – 2.84%

2007 – 4.29%

This meant that to compare 2003 data to 2007 data the 2003 cost data had to be multiplied by 1.1395.

For example, school uniform shirts for boys at secondary school cost £7.93 on average in 2003. Adjusted for inflation this was £9.04.

Appendix B: Response rates

Parents/carers survey - Survey fieldwork report and response rates

	N	Total issued sample	Out of scope	Screening	Eligibility	Valid sample
Total issued sample	116500	100%				
Sample not tried (already reached target)	7201	6%				
Sample covered	109299	94%	100%			
Invalid sample data - deadwood						
Invalid sample data - deadwood	86309		79%			
Invalid tel number	69405		64%			
Business number	8021		7%			
Number unobtainable	475		0%			
10+ calls	8408		8%			
In scope of screening						
In scope of screening	22990		21%	100%		
Not screened	6181			27%		
- <i>Deferral eligibility unknown</i>	2117			9%		
- <i>Hard refusal eligibility unknown</i>	3054			13%		
- <i>Unavailable during fieldwork</i>	227			1%		
- <i>Abandoned interview</i>	69			0%		
- <i>Respondent incapable of interview</i>	714			3%		
Screened	16809			73%	100%	
Eligibility						
Eligibility						
Ineligible	15227				91%	
Eligible	1582				9%	100%
Valid sample						
Valid sample						
Refusal	62					4%
No contact with selected respondent	0					0%
Abandoned interview	20					1%
Interview	1500					95%

Schools survey - response rates

For the schools survey, we received 208 completed questionnaires (192 postal, 16 online) from a total issued sample of 716, which gives an overall response rate of 29 per cent. This small sample size and low response rate means caution must be taken when looking at findings from the schools survey. Table A2 gives a breakdown and response rates.

Table A2 : Schools survey response rate

	Total sample	Completed response	Response rate (%)
Overall	716	208	29
Primary schools	389	147	38
Secondary schools	327	61	19

Appendix C: Weighting

Weighting was applied to all three sets of data (parents/carers, schools and children).

Parents/carers data

As part of the questionnaire all respondents were asked how many fixed telephone lines (not mobiles) the household had available for incoming calls (with different telephone numbers). This information made it possible to calculate design weights, as the number of telephone lines in a household is proportional to the probability that the household will be selected to take part in a random-digit-dialling survey. E.g. a household with two fixed telephone lines is twice as likely to be called as a household with one fixed telephone line.

The following design weights were therefore applied:

Number of fixed telephone lines	Design weight
1	1
2	0.5
3 or more	0.33

N.B. Just four respondents said they had more than three fixed telephone lines. A decision was taken to cap the number at three as it seemed unlikely that a private household would have more than three.

Parents/carers data was also examined to see if non-response weighting might be required. While an exact population profile of parents/carers with children aged between 5 and 16 at maintained school is not available, there are some suitable sources for comparison.

The Labour Force Survey (LFS), limited to parents and carers of children aged 5 to 16, was used to compare to our survey profile on the following measures:

- Marital status
- Number of financially dependent children in household
- Ethnicity
- Working status
- Tenure of accommodation

And BMRB's TGI survey, limited to parents and carers of children aged 6 to 14, was used to compare to our survey profile for the following measures:

- Household income
- Social grade

On all these measures the profile of respondents to the parents/carers survey was very similar to the profiles of relevant LFS and TGI respondents, so non-response weighting was not necessary. The table below shows the profile of respondents to the parents/carers survey against the relevant figures from LFS and TGI.

	Cost of Schooling parents/carers survey %	LFS/TGI %
Marital status		
Single, that is never married	16	16
Married and living with husband or wife	66	72
Married and separated from husband or wife	6	4
Divorced	11	8
Widowed	1	1
Number of financially dependent children (under 18) in household		
1	29	29
2	49	48
3	17	18
4	4	4
5	1	1
6	0.2	0.2
7	0.1	0.0
8	0.0	0.0
Ethnic origin of respondent		
White	89	88
Black or Black British	3	3
Asian or Asian British	4	6
Mixed	1	1
Any other ethnic group	2	2
Working Status		
Working	79	77
Retired	1	0
Other	21	23
Tenure		
Owned	75	71
Rented	23	28
Rent free	2	1
Household income		
Less than 3000 pounds per year	2	1
3000 pounds-5,999 pounds per year	4	3
6,000 pounds - 9,999 pounds per year	7	7
10,000 pounds - 14,999 pounds per year	11	12
15,000 pounds - 24,999 pounds per year	18	21
25,000 pounds - 34,999 pounds per year	18	20
35,000 - 49,999 pounds per year	21	20
50,000 or more per year	19	17

Social grade		
A	7	4
B	19	24
C1	33	27
C2	18	19
D	13	17
E	9	9

Schools survey

The profile of schools responding to the survey was compared to the sample population provided by DCSF (the EduBase database). Comparisons were made separately for primary and secondary schools, looking at the following measures:

- Category of school funding
- Urban/rural indicator
- Proportion of children eligible for free school meals
- Government office region

For primary schools the profile of responding schools was very similar to the profile of all schools in EduBase, so no weights were needed. These figures are shown in the table below.

	Primary schools responding to Cost of Schooling survey %	Population of primary schools %
Category of school		
Community	63	61
Foundation	1	2
Voluntary aided	24	22
Voluntary controlled	12	15
Urban/rural		
Urban	67	69
Town and fringe	12	11
Village, hamlet or isolated	22	20
Free schools meals (% eligible)	27	27
0 - 4	24	22
5 - 9	22	22
10 - 19	15	13
20 - 29	13	15
30+	27	27
Region		
East Midlands	12	10
East of England	14	12
London	13	11
North East	6	5
North West	10	15
South East	18	15
South West	9	11
West Midlands	7	10
Yorkshire and The Humber	10	11

For secondary schools the profile of responding schools was still fairly similar to the profile of all schools on EduBase, but weights were applied to correct for category of school funding. Table C1 shows the weighted and unweighted profile of secondary schools for this measure.

Table C1: Weighting – secondary schools		
	Unweighted proportion	Weighted proportion
	%	%
Community	70	65
Foundation	11	18
Voluntary aided	18	17
Voluntary controlled	0	0

The profile of responding secondary schools is compared to the population on other measures in the table below.

	Secondary schools responding to Cost of Schooling survey	Population of secondary schools
	%	%
Urban/rural		
Urban	88	83
Town and fringe	8	12
Village, hamlet or isolated	5	5
Free schools meals (% eligible)		
0 - 4	26	20
5 - 9	26	29
10 - 19	27	27
20 - 29	9	12
30+	12	12
Region		
East Midlands	3	9
East of England	16	13
London	11	12
North East	9	6
North West	11	14
South East	22	15
South West	9	10
West Midlands	13	12
Yorkshire and The Humber	8	9

Children's survey (Youth Omnibus data)

The data were weighted to ensure that demographic profiles match those of all young people in England aged 10-16. A rimb weighting technique was used in which target profiles were set for a series of separate demographic variables. The computer system then allocated a weight to each individual such that the overall composition of the sample was balanced in terms of the targets set.

Table C2 shows the target profiles used.

Table C2: Weighting – children's survey	
	Weighting target applied%
Sex	
Males	51.38
Females	48.62
Age	
10 – 12	41.38
13 – 14	28.80
15 – 16	29.82

Social grade⁴⁷	
AB	26.59
C1	28.46
C2	20.12
D	16.72
E	8.11
Region	
North West	11.03
North	5.34
Yorkshire and the Humberside	9.10
East Midlands	8.17
East Anglia	4.15
South East	22.66
London	18.11
South West	11.07
West Midlands	10.37

⁴⁷ Examples of social grades are: A - doctor, solicitor, accountant; B - teacher, nurse, police officer; C1 - junior manager, student, clerical worker; C2 - foreman, plumber, bricklayer; D - manual workers, shop workers, apprentices; E - casual labourers, state pensioners, unemployed. A fuller explanation is included in the introduction of this report.

Appendix D: Key driver analysis

A programme of multivariate analysis was carried out, as part of the analysis process, to identify the factors that had most impact on parents/carers happiness with the overall costs of schooling. The main technique used was multiple regression (also known as key driver analysis, or MLR).

Multiple regression analysis is a statistical technique regularly used by BMRB in public attitude research. It seeks to identify the influences which make an important contribution to, for example, overall happiness with a service, by showing to what extent views about the service overall can be predicted from views about particular aspects of the service.

The technique

The technique requires:

- A **dependent variable** which is to be explained, for example overall happiness with the cost of schooling.
- A number of **independent variables** (e.g. happiness with individual costs of schooling, or ability to meet costs involved with schooling, which are potentially able to explain variation in the dependent variable).

The procedure looks at the patterns of answers for the dependent versus the independent variables. The closer the pattern of answers, the more likely an independent variable is to be a key driver.

The dependent factor examined was the four-point scaled question about how happy parents/carers were about the costs associated with their children's schooling:

Q70 Taking everything we have talked about into account, how happy are you with the costs associated with sending your child to State school? Are you...?

Very happy	1
Quite happy	2
Not very happy	3
Not at all happy	4

Obvious independent ('cause') variables were the scaled questions concerning happiness with some of the subsidiary costs (uniforms and PE kit, and school trips). Other factors likely to influence were a scaled question about how easily the household could afford school costs, and an agreement scale question about whether the respondent felt pressurised into contributing to the cost of school trips.

Because other contributory areas could easily be unique items – like whether the respondent pays for their child’s travel to school - we looked (via correlation coefficients) at the relationship between the dependent factor (Q70) and other items in the questionnaire.

When it comes to measuring **relative** effects, we have to consider two things:

- the strength of relationship (and here scales are more sensitive than yes-no answers)
- the number of people affected (things affecting everyone have the best chance of being influential).

Multiple regression takes these both into consideration. Beta scores (standardised regression coefficients) are produced by the analysis for each of the independent variables to show the influence each one has in explaining the dependent variable. The Betas show how influential a predictor each one is relative to each other (this is sometimes called derived importance). The relatively small number of factors that emerge as the most effective predictors of the dependent are called key drivers.

The results

Not surprisingly the largest correlations with the dependent were in fact the subsidiary happiness questions, the ease of bearing the costs, and whether the respondent felt pressurised to pay for school trips.

	Corr	Base
• Happiness with uniform and PE kit costs	0.49	1411
• Happiness with school trips costs	0.55	1411
• Ease of family meeting costs	0.56	1411
• Whether feel pressured into paying for school trips	0.41	1411

All the correlations were fairly similar, but ease of paying the costs and happiness with the costs of school trips cost were expected to have the highest “Betas”.

We looked through the rest of the questionnaire and although there were one or two areas where the correlations with the dependent reached above 0.20, the bases involved were generally so low that these had only miniscule effects and were therefore discounted from further analysis.

Table D1 shows the relationship between the variables and happiness with overall costs. The scores are shown as beta correlation coefficients - the higher the value, the stronger the relationship.

Table D1 : Key Driver Analysis – Happiness with overall costs Base = All Parents/carers without 'don't know' answers (1411)	
	Standardised Beta coefficient
Ease of meeting costs	0.319
Happiness with school trips costs	0.264
Happiness with uniform and PE kit costs	0.215
Whether feel pressured into paying for school trips	0.105

As we suspected from the correlations, the ease (or otherwise) with which parents/carers were able to meet the costs involved emerged as the biggest driver in terms of overall happiness with the costs of schooling. Happiness with the costs of school trips was the next most important factor followed by happiness with uniform and PE kit costs. Whether or not the respondent felt pressured into paying for school trips appeared to have the least effect on overall happiness with the costs of schooling.

So we have something in our model now that relates to family hardship rather than just particular items of expenditure.

We also looked more closely at what factors influenced the ease of being able to meet all the costs (see Table D2).

Table D2 : Key Driver Analysis – Ease of meeting costs Base = All Parents/carers (1500)	
	Standardised Beta coefficient
Household income	0.314
Happiness with uniform and PE kit costs	0.251
Happiness with school trips costs	0.205
Whether feel pressured into paying for school trips	0.137

Predictably household income was the largest driver, followed by happiness with the two specific costs (especially that for uniform and PE kit).

Appendix E: Survey documents

Appendix E(1) – Parents/Carers Questionnaire

(Original question numbers used – some question numbers missing due to questions being dropped from final version)

QUESTIONNAIRE: MAINSTAGE - FINAL

SCREENER

S1 Good afternoon/evening. My name is and I am calling on behalf of the British Market Research Bureau, an independent market research company.

We are conducting a survey for the Governments' Department for Children, Schools and Families into the extra costs involved in sending children to state schools.

Your help would be much appreciated, can we go ahead now?

IF NECESSARY

This study aims to find out what costs are involved in sending children to state schools and explore attitudes towards the cost of state schooling in England.

S2 First of all can I just ask, how many children aged between 5 and 16 attending state school live in this household?

0	1	
1	2	ASK S7A
2	3	ASK S7B
3	4	
4	5	
5	6	
6	7	
7	8	
8 or more	9	
Refused	X	CLOSE

- S3 We would like to conduct the interview with the parent or guardian who is best equipped to talk about their child or children's education and the cost involved. Are you the parent or guardian best equipped to talk about these issues?

Yes	1	CONTINUE
No	2	ASK TO TRANSFER MAKE APPOINTMENT IF NECESSARY

⇒ Re introduce survey if necessary

IF NECESSARY SUSPEND ON THIS SCREEN AND MAKE APPOINTMENT. COLLECT NAME OF CORRECT RESPONDENT IN CALL RECORD.
WHEN SPEAKING TO CORRECT RESPONDENT, CONTINUE

IF CORECT RESPONDENT

- S4 Would you be willing to take part in the survey?

⇒ Re introduce survey if necessary

IF NEED REASSURANCE, SEE INFORMATION SHEET PROVIDED.

IF ASKED FOR LETTER: Are you happy to continue with the interview now, or would you like to wait until after the letter has arrived?

IF WANT TO WAIT FOR LETTER THEN MAKE APPOINTMENT FOR FIVE WORKING DAYS.

Willing to take part	1	CONTINUE
Not willing despite reassurances	2	TERMINATE

REASSURANCES:

- ⇒ The interview will take approximately 20 minutes
- ⇒ All your answers will be treated with the strictest confidence under the rules of the Market Research Society Code of Conduct
- ⇒ We will not try to sell you anything as a result of this interview
- ⇒ If you want to check BMRB's credentials you can call the MRS Society Freephone number 0500 396999
- ⇒ If you want to speak to someone at BMRB about the survey please contact Gareth Edwards at BMRB on 0208 4334409.

Alternatively, BMRB has a website for people taking part in our surveys. This contains information on our company, how we protect your personal information and other frequently asked questions. There is also a facility for you to contact us or give us your feedback. Would you like the web address? – www.mybmrbsurvey.co.uk.

- ⇒ If you want to speak to someone at the Department for Children, Schools and Families about the survey please contact Jenny Buckland on 0207 925 6177

IF RESPONDENT STILL HESITANT (USE AS LAST RESORT)

- ⇒ If you want more details on the survey BMRB will be happy to post or email a letter to you

⇒

IF RESPONDENT WANTS LETTER TAKE DOWN NAME AND ADDRESS / EMAIL ADDRESS DETAILS ON PAPER AND HAND TO SUPERVISOR. THIS IS A LAST RESORT ONLY.

CHILD DETAILS

WHEN SPEAKING TO MOST SUITABLE RESPONDENT

S5 Could I just record your name?

IF ONLY ONE CHILD ATTENDING STATE SCHOOL(Q7=1)

S7A And can I just record the name of the child aged between 5 and 16 who attends state school?

THIS WILL BE USED IN TEXT IN LATER QUESTIONS. IF RESPONDENT RELUCTANT, OFFER TO RECORD THE CHILDS INITIAL

IF MORE THAN ONE CHILD ATTENDING STATE SCHOOL.

S7B We need to randomly select one child for you to answer questions on. Can I ask the name of your child aged 5-16 attending state school whose birthday was most recent?

THIS WILL BE USED IN TEXT IN LATER QUESTIONS. IF RESPONDENT RELUCTANT, OFFER TO RECORD JUST THE INITIAL

Yes - Write in NAME (.....)	1	GO TO S8
Last birthday was twins / triplets etc.	2	ASK S7B1
REFUSED	3	CLOSE

IF TWINS / TRIPLETS

S7B1 Which of your children's names comes first alphabetically.

ASK ALL

S8 Record child's sex (should be clear – ASK IF NECESSARY)

Male	1
Female	2

INTERVIEWER TEXT

Thank you. Please answer the next questions with (NAME) in mind.

BACKGROUND SCHOOLS INFO

Q1 What school year is (NAME) in?

Year 1	1	CONTINUE
Year 2	2	
Year 3	3	
Year 4	4	
Year 5	5	
Year 6	6	
Year 7	7	
Year 8	8	
Year 9	9	
Year 10	10	
Year 11	11	
Year 12 (6 th Form)	12	
Reception Class	13	GO TO FILTER A
DK	X	GO TO FILTER ABOVE Q2
REFUSED		

IF DK / REFUSED SCHOOL YEAR:

Q2 Is (NAME) at primary, middle or secondary school?

Primary	1	
Middle	2	
Secondary	3	
6 th Form	4	
Reception Class	5	
DK	X	TERMINATE

FILTER A

IF SELECTED CHILD TURNS OUT TO BE AT 6TH FORM OR RECEPTION CLASS – AND RESPONDENT HAS MORE THAN ONE CHILD AT STATE SCHOOL - GO BACK TO S7B AND ASK FOR OTHER CHILD

IF SELECTED CHILD TURNS OUT TO BE AT 6TH FORM OR RECEPTION CLASS AND NO OTHER CHILDREN AT STATE SCHOOL – THANK AND CLOSE

INTERVIEWER TEXT

I'm now going to ask you to think about the types of things or activities that (NAME's) school may ask you to pay for or contribute to, for example school uniforms, lunches and trips.

UNIFORM

Q3 Starting with School uniform, does (name's) school require pupils to wear a school uniform?

Yes	1	CONTINUE
No	2	GO TO Q7
DK	3	

ASK ALL WITH SCHOOL UNIFORM

Q5 Please tell me which of the following items of uniform you are required to buy for (name)...

READ OUT. MULTICODED.

ADD IF NECESSARY: Please think only of normal school uniform – PE kit will be covered later

Response list filtered on sex of child.

Girls	Boys
i. Blouse/shirt	i. Shirt
ii. Trousers	ii. Trousers
iii. Skirt/kilt	iii. Shorts
iv. Jumper / sweatshirt	iv. Jumper / sweatshirt
v. Blazer	v. Blazer
vi. Dress / Pinafore	vi. -
vii. Tie	vii. Tie
viii. Shoes	viii. Shoes
ix. School Bag	ix. School Bag
x. Hat	x. Hat
xi. Socks	xi. Socks

ASK Q5A AND Q5B IF ANY ITEM MENTIONED AT Q5
 Q5A How many of these items were required to have a logo?
 ENTER NUMBER OF ITEMS

Q5B And apart from any items that were required to have a logo, how many of the items (of uniform) could have an optional logo?
 ENTER NUMBER OF ITEMS

ASK Q6 FOR MAX 4 ITEMS MENTIONED AT Q5
 IF MORE THAN 4 ITEMS MENTIONED CATI WILL RANDOMLY SELECT
 Q6 Thinking of (ITEM) how many of these did you buy for (name) as part of school uniform in 2007?

IF BOUGHT ITEM ASK Q6A
 Q6A How much did they cost per item?

WRITE IN _____ -
MUST USE POUNDS AND PENCE & DECIMALS (00.00)

ASK ALL WITH UNIFORM
 Q6B Has (name) ever been sent home from school because they did not have the right uniform?

Yes	1
No	2
DK	3

ASK ALL
 Q7 Does (name's) school require pupils to buy a PE or Games kit?

Yes	1	CONTINUE
No	2	GO TO Q10

DK	3	
----	---	--

Q8 I am now going to ask about the kit. Which of the following items does (NAME)'s PE or Games kit consist of?
READ OUT. MULTICODED.

<u>Girls</u>	<u>Boys</u>
I. Shorts	I. Shorts
II. T-shirt (used all year round)	II. T-shirt (used all year round)
III. Summer PE shirt	III. Summer PE shirt
IV. Winter PE shirt	IV. Winter PE shirt
V. Skirt	V. Football/rugby shirt
VI. Full Tracksuit	VI. Full Tracksuit
VII. Plimsolls/trainers	VII. Plimsolls/trainers
VIII. Jumper/tracksuit top	VIII. Jumper/tracksuit top
IX. Hockey boots	IX. Football/rugby boots
X. Swimming Costume	X. Swimming Trunks
XI. Socks	XI. Socks

ASK Q8A AND Q8B IF ANY ITEM MENTIONED AT Q8

Q8A How many of these items were required to have a logo?
ENTER NUMBER OF ITEMS

Q8B And apart from any items that were required to have a logo, how many of the items (of sports kit) could have an optional logo?
ENTER NUMBER OF ITEMS

ASK Q9 FOR MAX 4 ITEMS MENTIONED AT Q8 IF MORE THAN 4 ITEMS MENTIONED CATI WILL RANDOMLY SELECT

Q9 And thinking of (ITEM) how many of these did you buy for (name) in 2007?

WRITE IN _____

IF BOUGHT ITEM ASK Q6A

Q9A How much did they cost per item?

WRITE IN _____

ASK ALL WITH UNIFORM / PE KIT

Q10 Thinking about uniform and PE kit as a whole, does either some or all of the uniform have to be bought from a designated shop or the school itself or can it be bought from any outlet?

PROBE AS APPROPRIATE

All has to be bought from designated shop	1
All has to be bought from school	2
Some items have to be bought from designated shop, but other items can be bought from anywhere	3
Some items have to be bought from the school itself , but other items can be bought from anywhere	4
Some items have to be bought from the school and some from a designated shop	5
All items can be bought from anywhere	6
DK	X

ASK ALL WITH SCHOOL UNIFORM / PE KIT

Q10A How happy are you with the cost of (name)'s school uniform /PE kit? Are you...?

READ OUT

Very happy	1	
Quite happy	2	
Not very happy	3	
Not at all happy	4	
DK / REFUSED	X	

ASK ALL WHERE LOGO'S REQUIRED / OPTIONAL FOR ANY ITEM(S) OF SCHOOL UNIFORM / PE KIT

Q10B Thinking about logos on any items of school uniform and PE kit, were you allowed to sew this on yourself?

PROBE AS APPROPRIATE

Allowed to sew logo's on to all items	1
Allowed to sew logos on to some items	2

All items had to be bought with the logo	3
DK	4

- Q11 Do you have the opportunity to buy used school uniforms from the school, or be given them free of charge by the school??
PROBE AS APPROPRIATE

Yes, second-hand uniform can be purchased	1
Yes, second-hand uniform can be given free of charge	2
Yes, both these options are available	3
No, neither of these options are available	4
DK	X

- Q13 Do you receive any financial help or assistance with buying school uniform for (name)?
IF YES : WHAT SORT
PROBE FULLY. MULTICODE IF NECESSARY.

No financial assistance	1
Local Authority Grant	2
Charity grant	3
Friends / Family	4
Funds from School	5
OTHER (SPECIFY) _____	6
DK/REF	X

MEALS

- ASK ALL
Q14 Thinking now about meals during school hours, does (NAME) usually have ...
...
READ OUT

A Packed Lunch	1	
A School Dinner	2	
A meal at home	3	
A meal out	4	
(Do not read out) Other	5	
DK	X	

Q15 Does (NAME) qualify for free school meals?

Yes	1
No	2
DK	3
REFUSED	X

Q15a Have you ever received information on free school meals from (childs) school?

Yes	1
No	2
DK	3
REFUSED	X

IF PACKED LUNCH OR EAT AT HOME OR EAT OUT

Q18 Why does (name) take a (packed lunch / eat at home / eat out) rather than have a school meal?

MULTICODE

(He/she) prefers to take own food / eat at home / eat out	1
School meals are too expensive	2
School meals are not value for money	3

School meals are not healthy	5
School meals are not filling	6
Prefers to eat with friends who have same lunch arrangement	7
Other (specify)	

ASK ALL

Q19 How much do you typically spend on meals during school for (name) ?

WRITE IN AMOUNT IN POUNDS AND PENCE _____

Q19A And is that.....
READ OUT

Daily	1
Weekly	2
Monthly	3
Half term	4
By Term	5
Yearly	6
OTHER	7
DK	X
Refused	Y

SCHOOL TRIPS

I would now like you to think about any school trips (name) was offered by the school in 2007. Thinking about both day trips and residential trips, that is those involving an overnight stay...

Q20 How many day or residential trips for (NAME) were you asked to pay for in 2007?

One	1	
Two	2	

Three	3	SKIP TO Q35
More than 3	4	
NULL	5	
DK	X	
Refused	Y	

Q22 Was the most recent trip that (name) was invited to go on in 2007 a day or a residential trip?

PROBE AS APPROPRIATE

Day Trip	1
Residential Trip (UK)	2
Residential Trip (abroad)	3
OTHER (Specify).....	4
DK	X

IF ASKED TO GO ON THE TRIP

Q22A Did (name) go on the trip?

Yes	1
No	2

Q22B Were you asked to pay the whole cost for the trip?

Yes	1
No	2
Refused	3
Don't Know	4

Q22C How much were you asked to Pay?

Q22D Was there an opportunity to pay in instalments?

Yes	1
No	2
DK	3

IF WENT ON TRIP (Q22A=1)

Q23 Which of the following would happen if you could not afford to pay for (name) to go on the trip ?

Read out

School would cover cost for (NAME)	1
(Name) would be unable to go	2
DK	3

IF DID NOT GO ON TRIP (Q22A=2)

Q23A Why did (name) not go on the trip?

Child did not want to go	1
Parent did not want child to go	2
Could not go as made other plans	3
Could not afford to go	4
OTHER (SPECIFY).....	5

ASK ALL

Q35 When Parents are informed about school trips are they invited to discuss any difficulties with paying for the trip with the teacher(s) involved?

Yes – ALWAYS	1
Yes – SOMETIMES	2
No - NEVER	3
DK	4

Q35A How happy are you with the costs associated with school trips for (name)?
Are you...?

READ OUT

Very happy	1
Quite happy	2
Not very happy	3
Not at all happy	4
DK / REFUSED	X

Q36 In 2007 were you asked to make a voluntary contribution towards a school trip that took place within school hours?

Yes	1
No	2
DK	3

Q37 Could you tell me whether you agree or disagree with the following statement.
'I sometimes feel pressurised into contributing to the cost of school trips for (name)'

If agree or disagree: Is that a lot or a little?

Agree a lot	1
Agree a little	2
Neither agree or disagree	3
Disagree a little	4
Disagree a lot	5
DK / REFUSED	X

IF CHILD ELIGIBLE FOR FSM

Q38 Are you aware that children who are eligible for free school meals do not have to pay for board and lodgings on residential trips?

IF RESPONDENTS ARE UPSET THAT THEY HAVE PAID FOR TRIPS WHEN THEY DIDN'T NEED TO AND WANT TO COMPLAIN, GIVE THEM THE DCSF MAIN SWITCHBOARD NUMBER: 0870 000 2288.

Yes	1
No	2
DK	3

ASK ALL

- Q39 Are you aware that no compulsory charge can legally be made by schools for trips during school time, although voluntary contributions can be requested?

IF RESPONDENTS ARE UPSET THAT THEY HAVE PAID FOR TRIPS WHEN THEY DIDN'T NEED TO AND WANT TO COMPLAIN, GIVE THEM THE DCSF MAIN SWITCHBOARD NUMBER: 0870 000 2288.

Yes	1
No	2
DK	3

ITEMS AND ACTIVITIES

LOOP 1 – ASK Q41/42/42A FOR 1/4

- Q41 Thinking about other items and activities, which of the following possible class materials or other lessons for (NAME) were you asked to pay for in 2007.

FOR EACH ITEM IF NECESSARY: Were you asked to pay for these in 2007

READ OUT

	Yes	No	DK
Material or equipment for Design & Technology (including Woodwork / Metalwork and textiles)	1	2	X
Material or equipment for Cookery	1	2	X
Material or equipment for Art Lessons	1	2	X
Material or equipment for IT lessons	1	2	X
Material or equipment for MUSIC lessons	1	2	X
Text books or revision guides	1	2	X

Swimming Lessons	1	2	X
Deposits for items such as textbooks or lockers	1	2	X

REPEAT Q42 / Q42A FOR EACH ITEM MENTIONED AT Q41 FOR MAX. 3

IF MORE THAN 3 MENTIONED – RANDOMLY SELECT

Q42 How much have you been asked to contribute for (ITEM) in 2007?

WRITE IN _____

Q42A And is that...

Daily / Per Lesson	1
Weekly	2
Monthly	3
Half term	4
By Term	5
Yearly	6
One off cost	7
DK	X
Refused	Y

ASK ALL

Q42C Which of these items were you asked to provide for (name) in 2007?

READ OUT

	Yes
LOOP 1 – ASK 50%	
Exercise Book or Paper	1
Pencils	2
Note books	3

Calculator	4
LOOP 2 – ASK 50%	
Ruler	5
Geometry Set (including protractor, angled rulers)	6
Pens	7
Pencil Case	8

ASK Q42D FOR EACH ITEM MENTIONED AT Q42C

Q42D How much have you been asked to contribute for (ITEM) in 2007?

WRITE IN _____

TRANSPORT

Thinking now about transport...

Q51 How does (Name) usually get to school?

Walk	1	GO TO Q56
Cycle	2	GO TO Q56
Taxi –child taken alone	3	ASK Q51A
Taxi – child shares with other children	4	ASK Q51A
Car – child taken alone	5	GO TO Q56
Car – child shares with other children	6	GO TO Q56
Dedicated School Bus	7	ASK Q51A
Public transport	8	ASK Q51A
It varies on day to day basis	9	GO TO Q56
More than one mode of transport each day	10	GO TO Q56
OTHER (Please Specify).....	11	GO TO Q56

IF PUBLIC TRANSPORT (8) / TAXI (3/4) / SCHOOL BUS (7)

Q51A Who pays for this travel?

IF SAY FREE – ASK WHO PROVIDES THE FREE SERVICE

Respondent (Parent)	1
School	2
Local Authority	3
OTHER (Specify)	4
DK	5

IF PARENT PAYS

Q52 How much do you pay for this?

WRITE IN _____

Q52A And is that...?

READ OUT

Daily	1
Monthly	2
Weekly	3
Termly	4
Single Fare	5
Other (Please Specify)	4

CONTRIBUTIONS TO THE SCHOOL FUND / CHARITY

Q56 Have you ever been asked to contribute to the school fund on behalf of (name)?

NOTE: SCHOOL FUND MAYBE CALLED GOVERNORS FUND OR PTA FUND

Yes	1
No	2
DK	3

IF YES

Q57 How much money were you asked to contribute?

WRITE IN

(.....)

Q58 How often is that?

REFERS TO BEING ASKED TO CONTRIBUTE TO SCHOOL FUND

Daily	1
Weekly	2
Monthly	3
Half term	4
Each term	5
Yearly	6
One off payment	7
DK	X
Refused	Y

LOOP 2 – ASK Q60/61/61A FOR 1/4

Q60 Were you asked by the school to contribute cash or items to charity IN 2007, on behalf of (NAME), for example any “wear what you want days”, Comic Relief or Children in Need events?

Yes	1
No	2
DK	3

IF Q60 = Yes

Q61 How many times were you asked to contribute to events such as these on behalf of (NAME) in 2007?

INTERVIEWER NOTE: IF UNSURE PROMPT FOR ESTIMATE

Once	1
Twice	2
Three time	3
Four or more	4
DK	5

Q61A What was the approximate cost the last time you contributed to an event like this on behalf of (name)?

WRITE IN

(.....)

LOOP 3 – Ask Q62/62A FOR 1/4

OTHER ACTIVITIES OR ITEMS

Q62 Were you asked to contribute something else to a school activity such as contributions to a cake stall (or similar), raffle or jumble sale on behalf of (NAME) in 2007?

MULTICODE

Contribution to a cake stall (or similar)	1
Raffle	2
Items for Jumble sale	3
Party food – crisps / drinks / sweets	4
Other	5
None	5

IF ANY MENTION AT Q62

Q62A What was the approximate cost of these items in 2007?

.....

LOOP 4 – ASK Q63/63A FOR 1/4

Q63 Did you buy any school photos of (NAME) in 2007?

Yes	1
No	2
DK	3

IF YES

Q63A What was the cost of these School photos of (NAME) in 2007?

.....	1
Did not have any	2

ASK ALL

Q64 Are you aware of any assistance that is available from (NAME)'s school with any of the costs we have talked about?

IF NECESSARY: This refers to all costs discussed throughout the whole survey.

Yes	1
No	2
DK	3

IF YES

Q64A What sort of assistance is available?

PROBE FULLY: What else?

--

Q68 How easy would you say it is for your family to meet all the costs discussed in his survey? Is it...?

READ OUT

Very Easy	1
Quite Easy	2
Quite difficult	3
Very difficult	4
DK / REFUSED	X

Q70 Taking everything we have talked about into account, how happy are you with the costs associated with sending (name) to state school? Are you...?

READ OUT

Very happy	1
Quite happy	2
Not very happy	3
Not at all happy	4
DK / REFUSED	X

PRIVATE TUITION

I would now like to ask you about any private tuition that <child> might receive. By private tuition I mean any form of education that <child> might receive outside of school, which is funded privately.

Q70A Does (name) receive private tuition in any subject? This includes any academic subject or skill but not sport or music tuition.

Yes	1	GO TO Q70B
No	2	GO TO Q71
DK	3	GO TO Q71

IF YES

Q70B What subjects does (name) receive private tuition in?

(Do not read out. Interviewer to record all mentioned by respondent)

Maths or numeracy	1
English or literacy (e.g. reading, writing)	2
Foreign language e.g. French, German	3
Science	4
Design and technology	5
ICT	6
Art and design	7
Humanities (history, geography)	8
Business studies or economics	9
Cognitive tests e.g. for entry to secondary school	10
Generic skills e.g. revision technique	11
Other	12
DK	X

IF Q70B IS 'Maths or numeracy' or 'English or literacy' ASK Q70C-Q70F.
OTHERS GO TO Q71.

Q70C And what kind of tuition does (name) receive for (Maths / English)?

(IF MENTIONED BOTH ENGLISH AND MATHS THEN ASK SEPARATELY
OR EACH)

PROBE FULLY.

One-to-one tuition	1
Small group tuition	2
Tuition club	3
Other	4
DK	X

Q70D How often does (name) receive private tuition in English/ Maths?

(IF MENTIONED BOTH ENGLISH AND MATHS THEN ASK SEPARATELY
OR EACH)

Daily	1
A few times a week	2
Weekly	3
A few times a month	4
Monthly	5
As and when it's required (e.g. if exams upcoming)	6
DK	X

Q70E How long is each tutoring session?

(IF MENTIONED BOTH ENGLISH AND MATHS THEN ASK SEPARATELY
OR EACH)

WRITE IN

(.....)

Q70F And how much does each session cost?

(IF MENTIONED BOTH ENGLISH AND MATHS THEN ASK SEPARATELY FOR EACH)

WRITE IN

(.....)

DEMOGRAPHICS

For classification purposes only I would now like to ask about annual household income.

Any information given will be in the strictest confidence.

Q71 In which of the following bands does your TOTAL annual household income fall before tax is deducted?
READ OUT. SINGLE CODE.

Less than 3000 pounds per year	1
3000 pounds-5,999 pounds per year	2
6,000 pounds - 9,999 pounds per year	3
10,000 pounds - 14,999 pounds per year	4
15,000 pounds - 24,999 pounds per year	5
25,000 pounds - 34,999 pounds per year	6
35,000 - 49,999 pounds per year	7
50,000 or more per year	8
DK	9
REFUSED	

Q72 Can I just check your legal marital status? Are you...
READ OUT AND CODE FIRST TO APPLY
IF COHABITING AND NEVER PREVIOUSLY MARRIED, CODE 1

Single – that is never married	1
--------------------------------	---

Married and living with husband or wife	2
Married and separated from husband or wife	3
Divorced	4
Widowed	5
Don't Know	X
Refused	R

IF SINGLE

Q72A And are you currently cohabiting with a partner at the moment?

Yes	1
No	2
DK	3
REFUSED	X

Q73 Including (name) how many children aged under 18 who live in this household are financially dependent on you?

1	1
2	2
3	3
4	4
5	5
6	6
7	7
8 or more	8
Don't Know	X
Refused	R

Q75 Which of the following groups do you belong to?
 READ OUT

White	1
Black or Black British	2
Asian or Asian British	3
Mixed	4
Any other ethnic group	5
Don't Know	X
Refused	R

IF Q75 = White

Q75A Please can you tell me your ethnic group

White: British	1
White: Irish	2
White: Other white background	3
Don't know	17
Refused	18

IF Q75 = Mixed

Q75B Please can you tell me your ethnic group

Mixed: White and black Caribbean	4
Mixed: White and black African	5
Mixed: White and Asian	6
Mixed: Other mixed background	7
Don't know	17
Refused	18

IF Q75 = Asian or Asian British

Q75 Please can you tell me your ethnic group

Asian or Asian British: Indian	8
Asian or Asian British: Pakistani	9
Asian or Asian British Bangladeshi	10
Asian or Asian British Other Asian background	11
Don't know	17
Refused	18

IF Q75 = Black or Black British

Q75D Please can you tell me your ethnic group

Black or Black British: Caribbean	12
Black or Black British African	13
Black or Black British: Other black background	14
Don't know	17
Refused	18

Q76 How many people live in the household including yourself?

WRITE IN _____

Q77 Which member of your household would you say is the Chief Income Earner - that is the person with the largest income, whether from employment, pensions, state benefits, investments or any other sources?

Respondent	1
Respondent's Spouse/Partner	2
Respondent's Mother/Father (in law)	3
Respondent's Son/Daughter (in law)	4
Respondent's Brother/Sister (in law)	5
Respondent's other relative	6
Other person	7
Refused/not stated	8

ESTABLISH WHO IS THE HOUSEWIFE (I.E. THE PERSON MOSTLY RESPONSIBLE FOR THE SHOPPING, COOKING, CLEANING ETC.) AND CODE BELOW.

Respondent	1
Respondent's Spouse/Partner	2
Respondent's Mother/Father (in law)	3
Respondent's Son/Daughter (in law)	4
Respondent's Brother/Sister (in law)	5
Respondent's Other relative	6
Other person	7
Refused/not stated	x

Q78 Do you yourself work ... READ OUT LIST

Thirty hours or more per week	1
Less than thirty hours per week	2
Are you retired from a full time job	3
Or are you not working for some other reason	4
(DON'T READ OUT) Refused/not stated	5

Q79 And thinking about ... (CHIEF INCOME EARNER) does he/she work ...

READ OUT LIST

Thirty hours or more per week	1
Less than thirty hours per week	2
Are you retired from a full time job	3
Or are you not working for some other reason	4
(DON'T READ OUT) Refused/not stated	5

Q80 INTERVIEWER: The C.I.E. is the &cie&

Establish whether the C.I.E. is ...?

Thirty hours or more per week	1
Less than thirty hours per week	2
Retired, gets pension from previous job	3
Unemployed 2 months or less	4
Sick - still receiving pay or statutory pay from job	5
Widow receiving pension from husbands previous job	7
Divorced/separated receiving maintenance from ex-husband	8
Full time student	9
Not working - with private means	10
Unemployed more than 2 months	11
Sick - only receiving income support or incapacity benefit	12
Receiving State pension/benefits only	13
Refused	14

NOW COLLECT DETAILS OF THE CHIEF INCOME EARNER

Q81 Is the work manual/non manual?

Manual	1
--------	---

Non manual	2
Don't Know	3
Refused	X

Q82 Are they an employee or self employed?

Employed	1
Self employed	2
Don't Know	3
Refused	X

Q83 How many people work at the same place?

Numeric Range _____

Q84 How many people CIE responsible for?

Numeric Range _____

Q85 At what age did you finish your full time education?

14	1
15	2
16	3
17	4
18	5
19	6
20	7
21 - 23	8
24 or more	10
Still studying	11
Refused / Not stated	X

ASK ALL

Q86 Do you own your house/flat, or rent it, or do you live here rent free?

Owned	1
Rented	2
Rent free	3
Refused/not stated	X

IF OWNED

Q87 Is it owned outright or is it being bought with a mortgage or loan?

Owned outright	1
Mortgage / Loan	2
Don't Know	3
Refused	X

IF RENTED

Q88 Is it rented from the council / Housing Association or from someone else?

Council / Housing Association	1
Someone else	2
Don't Know	3
Refused	X

Q89 Could you tell me how many fixed telephone lines are available for incoming calls to your household? Please only include those with different numbers and do not include mobile phones.

WRITE IN _____

Q90 Please could I take your postcode?

WRITE IN _____

THANK AND CLOSE

CODE SOCIAL GRADE HERE

Appendix E(2) – Introduction letter sent to schools (prior to fieldwork)

<title> <first name> <surname>
<school name>
<address 1>
<address 2>
<address 3>
<address 4>

<serial number>

16th April 2008

COST OF SCHOOLING SURVEY 2008

Dear <title> <surname>,

BMRB Social Research has been commissioned by the Department for Children, Schools and Families to carry out a survey of schools in the state sector to try to establish the additional costs to parents for their child's education. The research aims to capture a range of items and activities that schools asked parents to pay for or contribute towards in 2007. These include both expenses that were school-wide and department-specific.

When the research has been completed, all schools that took part in the survey will be sent a summary of the main findings from the research. This would most likely be in December 2008.

Participation in the survey is voluntary. The survey can either be completed on paper, using the questionnaire included in this pack, or online (details overleaf).

We would be extremely grateful if you complete the questionnaire and return it by **12th May 2008**.

Please note that any answers given will remain confidential. Only members of BMRB's research team will have access to responses and any data passed on to the Department for Children, Schools and Families will be in the form of aggregated, anonymised data. It will not be possible to identify any particular school or individual taking part. BMRB operates according to the Market Research Society code of conduct. If you want to check BMRB's credentials you can call the MRS Society Free-phone number 0500 396999.

We recommend that one person should co-ordinate the completion of the questionnaire, although they may well need to consult colleagues for department specific details.

If you want to complete the paper questionnaire

Guidance for completing the paper questionnaire can be found on the questionnaire itself.

If you want to complete the online questionnaire

If you would prefer to complete the questionnaire online, you can go to the secure website allocated for this survey:

www.costofschooling.ktrmr.com

There you will be asked to enter a password. Your unique password is <password>. This password protection means that no unauthorised person will be able to access your school's details.

You do not have to enter all the information at once - indeed, it is likely that you will want to check some details with colleagues. You can go back into the site to check or amend details as many times as you like, but you will need the password each time. When you have finalised your answers you can approve them online and they will be sent to BMRB.

Please submit the form by 12th May 2008

If you have any questions or would like to know more about this project please contact either:

Jenny Buckland
Department for Children, Schools and Families
020 7925 6177
Jenny.BUCKLAND@dcsf.gsi.gov.uk

OR
Gareth Edwards
BMRB Social Research
020 8433 4409
Gareth.Edwards@bmr.co.uk

Any queries about how to complete the questionnaire should be directed to BMRB. I sincerely hope you will find the time to take part in this important survey.

Yours sincerely,



Mark Peters
BMRB Social Research

Appendix E(3) – Reminder letter sent to schools

<title> <first name> <surname>
<school name>
<address 1 >
<address 2 >
<address 3 >
<address 4 >

Survey number; 45107282

Reference number; <serial number>

12th May 2008

COST OF SCHOOLING SURVEY 2008

Dear <title> <surname> ,

A short while ago you should have received a letter and a questionnaire for a survey that BMRB are carrying out on behalf of the Department for Children, Schools and Families into the costs to parents associated with sending their children to state schools.

Our records show we are yet to receive a completed questionnaire from this school and we would like to again ask for your help with the survey. It is very important that as many schools as possible take part in the research to allow us to build a complete picture of what parents are asked to pay for.

Enclosed is a second copy of the questionnaire. Please could you find the time to complete it and return it to us by **2nd June**.

It is also possible to complete the questionnaire online at the secure website www.costofschooling.ktrmr.com. Instructions for completing the online survey can be found overleaf.

Please be assured that any answers given will remain be confidential. Only members of BMRB's research team will have access to responses and any data passed on to the Department for Children, Schools and Families will be in the form of aggregated data only. It will not be possible to identify any particular school or individual taking part.

If you have already returned your questionnaire then please ignore this reminder and thank you for taking part.

If you want to complete the online questionnaire

If you would prefer to complete the questionnaire online, you can go to the secure website allocated for this survey. :

www.costofschooling.ktrmr.com

There you will be asked to enter a password. Your unique password is <password>. This password protection means that no unauthorised person will be able to access your school's details.

You do not have to enter all the information at once - indeed, it is likely that you will want to check some details with colleagues. You can go back into the site to check or amend details as many times as you like, but you will need the password each time. When you have finalised your answers you can approve them online and they will be sent to BMRB.

Please submit the form by 2nd June 2008

If you have any questions or would like to know more about this project please contact either:

Jenny Buckland
Department for Children, Schools and Families
020 7925 6177
Jenny.BUCKLAND@dcsf.gsi.gov.uk

Or

Gareth Edwards
BMRB Social Research
020 8433 4409
Gareth.Edwards@bmr.co.uk

Any queries about how to complete the questionnaire should be directed to BMRB. BMRB has a website for people taking part in our surveys –

www.mybmrbsurvey.co.uk. This contains information on our company, protecting your personal information and other frequently asked questions. There is also a facility for you to contact us or give us your feedback.

I sincerely hope you will find the time to take part in this important survey.

Yours sincerely,



Mark Peters
BMRB Social Research

Appendix E(4) – Schools postal questionnaire

COST OF SCHOOLING SURVEY 2008

Notes for completion of the paper form

Please complete the questions as instructed. Some questions require a single answer, others can have multiple responses. This should be clear in the instructions for each question - for example, an instruction to "cross one box only" or to "cross all that apply".

Contacts

If you have a query about the survey, you can contact:

Gareth Edwards

or

Jenny Buckland

BMRB Social Research

Department for Children Schools and Families

02084334409

020 7925 6177

E-mail: Gareth.Edwards@BMRB.co.uk

Jenny.BUCKLAND@dcsf.gsi.gov.uk

QUERIES ABOUT COMPLETING THE QUESTIONNAIRE SHOULD GO TO BMRB IN THE FIRST INSTANCE

Serial Number ()

SECTION A - FINANCIAL CONTRIBUTION

A1 Are parents/carers asked to contribute to any type of fund (e.g. school fund, PTA fund etc.)?

Please cross (x) one box only

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
	1		2

IF NO GO TO SECTION B

IF YES PLEASE CONTINUE

A2 How much are parents/carers asked to contribute? (in £). Please indicate whether this is per child or per family.

--

A3

Is this amount requested...

Please cross (x) one box only

Yearly	<input type="checkbox"/> 1	Half-termly	<input type="checkbox"/> 3	Weekly	<input type="checkbox"/> 5
Termly	<input type="checkbox"/> 2	Monthly	<input type="checkbox"/> 4	Other	<input type="checkbox"/> 6

A4

How can this money be paid?

Please cross (x) all boxes that apply

Direct debit	<input type="checkbox"/> 1	Cash/cheque	<input type="checkbox"/> 2	Online payment	<input type="checkbox"/> 3	Other	<input type="checkbox"/>

							4

A5

What is this fund used for?

Please cross (x) all boxes that apply

To support school events	<input type="checkbox"/> 1	To support school trips	<input type="checkbox"/> 6
To support school sports	<input type="checkbox"/> 2	To provide uniforms and equipment for children from more deprived families	<input type="checkbox"/> 7
To contribute to the cost of school equipment	<input type="checkbox"/> 3	To provide books for school library	<input type="checkbox"/> 8
To contribute to the cost of school maintenance	<input type="checkbox"/> 4	Insurance	<input type="checkbox"/> 9
To contribute to the cost of additions to school buildings	<input type="checkbox"/> 5	Other (please specify)	<input type="checkbox"/> 10

A6

Is this payment:

Please cross (x) one box only

Voluntary for parents/carers?	<input type="checkbox"/> 1	Compulsory for parents/carers?	<input type="checkbox"/> 2
-------------------------------	----------------------------	--------------------------------	----------------------------

IF PAYMENT IS COMPULSORY PLEASE GO TO A9

IF PAYMENT IS VOLUNTARY PLEASE CONTINUE

A7 Is a reminder letter sent out to parents/carers who do not immediately pay the voluntary contribution?

Yes 1 No 2

A8 Are parents asked to give a reason if they decide not to pay?

Yes 1 No 2

A9 What happens if parents/carers are unable to pay into the school fund (e.g. are there implications for the school or consequences for pupils)?

1		

SECTION B - SCHOOL UNIFORM

B1

PLEASE COMPLETE THIS SECTION IF YOUR SCHOOL REQUIRES PUPILS TO HAVE SCHOOL UNIFORM

IF YOUR SCHOOL HAS NO SCHOOL UNIFORM PLEASE TICK HERE : AND GO TO SECTION C

Please list the following details:

- A.** Which uniform items are required and which are optional?
- B.** Do these items have to be purchased from a specific supplier?
- C.** Are school logos required, optional or not required for each item?
- D.** How much do these items cost – **PER ITEM?**
- E.** Is this an estimate or an exact cost?

	A			B. Specific supplier		C. Logos			D	E. Estimate or exact?	
	Required	Optional	Not required	Yes	No	Required	Optional	Not required	Price (£)	Est.	Exact
Sweatshirt/jumper/cardigan	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Blouse/shirt	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Trousers/skirt	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Dress/pinafore	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Shorts	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Blazer	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Tie	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Specific type of shoes	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Specific type of coat	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Bag	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Specific type of socks	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Cap/Hat	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Specific scarf	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/>	<input type="checkbox"/>
				4	5					9	10

B2

Does the school permit parents/carers to sew school logos onto uniform items bought from non-specialist suppliers?

Please cross (x) one box only

Yes <input type="checkbox"/>	No <input type="checkbox"/>
1	2

B3

Is there a different uniform requirement for different groups of pupils, for example year groups or houses? If yes, please give details:

B4

What happens if a pupil comes to school without school uniform?*Please cross (x) all boxes that apply*

No action	<input type="checkbox"/> 1	Pupil withdrawn from class	<input type="checkbox"/> 5
Pupil receives verbal warning	<input type="checkbox"/> 2	Pupil sent home	<input type="checkbox"/> 6
Warning letter sent home	<input type="checkbox"/> 3	Pupil loaned a uniform	<input type="checkbox"/> 7
Pupil receives detention	<input type="checkbox"/> 4	Other:	<input type="checkbox"/> 8

B5

If a pupil's family cannot afford new uniform are any of the following types of assistance available to them? If so, is the service publicised to parents/carers by the school?*Please cross (x) all boxes that apply*

	Is available			Is publicised			How many pupils received this form of assistance in 2007?
	Yes	No	Don't know	Yes	No	Don't know	
Local Authority Grant	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
School provides second hand uniform free of	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
School offer second hand uniform at reduced price	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
School/PTA fund	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Local or National Charity	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Other:	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	

SECTION C - SPORTS KIT

PLEASE COMPLETE THIS SECTION IF YOUR SCHOOL REQUIRES PUPILS TO HAVE SPORTS KIT

IF NO SPORTS KIT IS REQUIRED PLEASE TICK HERE : AND GO TO SECTION D

C1

Please list the following details:

- A.** Which items of sports kit are required and which are optional?
- B.** Do these items have to be purchased from a specific supplier?
- C.** Are school logos required, optional or not required for each item?
- D.** How much do these items cost – **PER ITEM?**
- E.** Is this an estimate or an exact cost?

	A			B. Specific supplier		C. Logos			D	E. Estimate or exact?	
	Required	Optional	Not required	Yes	No	Required	Optional	Not required	Price (£)	Est.	Exact
T-shirt	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Football/rugby shirt	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Shorts	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Netball skirt	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Full tracksuit	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Tracksuit top/jumper/sweatshirt	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Tracksuit bottoms/jogging	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Trainers or plimsolls	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Football/rugby/hockey boots	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Socks	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Swimming costume	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Bag	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/>
Other: _____ _____	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/> 10

C2 Does the school permit parents/carers to sew school logos onto sports kit bought from non-specialist suppliers?

Please cross (x) one box only

Yes <input type="checkbox"/> 1	No <input type="checkbox"/> 2
--------------------------------	-------------------------------

C3 Is there a different sports kit requirement for different groups of pupils, for example year groups or houses? If yes, please give details:

3		

C4 What happens if a pupil fails to provide an item of sports kit?

Please cross (x) all boxes that apply

No action <input type="checkbox"/> 1	Pupil withdrawn from class <input type="checkbox"/> 5
Pupil receives verbal warning <input type="checkbox"/> 2	Pupil sent home <input type="checkbox"/> 6
Warning letter sent home <input type="checkbox"/> 3	Pupil loaned an item <input type="checkbox"/> 7
Pupil receives detention <input type="checkbox"/> 4	Other: _____ <input type="checkbox"/> 8

C5 If a pupil's family cannot afford new sports kit are any of the following types of assistance available to them? If so, is the service publicised to parents/carers by the school?

Please cross (x) all boxes that apply

	Is available			Is publicised			How many pupils received this form of assistance in 2007?
	Yes	No	Don't know	Yes	No	Don't know	
Local Authority Grant	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
School provides second hand sports kit free of	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
School offer second hand sports kit at reduced price	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
School/PTA fund	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Local or National Charity	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Other:	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	

SECTION D - CLASSROOM MATERIALS AND STATIONERY

D1

Text books

Please list the following details for the key stages your school caters for:

- Whether text books purchased by pupils are compulsory for any subjects
- How many text books must be bought by pupils each year
- The total cost of all the text books that must be bought by pupils each year
- Whether text books are recommended for any subjects
- How many text books are pupils recommended to buy each year
- The total cost per year of all the text books that are recommended

	A. Are any compulsory?		B If yes, how many per year must be bought by pupils?	C Total cost per year to pupils (£)	D. Are any recommended?		E If yes, how many per year are recommended?	F Total cost per year of recommended text books (£)
	Yes	No			Yes	No		
KS2	<input type="checkbox"/> 1	<input type="checkbox"/> 2			<input type="checkbox"/> 3	<input type="checkbox"/> 4		
KS3	<input type="checkbox"/> 1	<input type="checkbox"/> 2			<input type="checkbox"/> 3	<input type="checkbox"/> 4		
KS4	<input type="checkbox"/> 1	<input type="checkbox"/> 2			<input type="checkbox"/> 3	<input type="checkbox"/> 4		

Revision guides

Please list the following details for the key stages your school caters for:

- Whether revision guides purchased by pupils are compulsory for any subjects
- How many revision guides must be bought by pupils each year
- The total cost of all the revision guides that must be bought by pupils each year
- Whether revision guides are recommended for any subjects
- How many revision guides are pupils recommended to buy each year
- The total cost per year of all the revision guides that are recommended

	A. Are any compulsory?		B	C	D. Are any recommended?		E	F
	Yes	No	If yes, how many per year must be bought by pupils?	Total cost per year to pupils (£)	Yes	No	If yes, how many per year are recommended?	Total cost per year of recommended revision guides (£)
KS2	<input type="checkbox"/> 1	<input type="checkbox"/> 2			<input type="checkbox"/> 3	<input type="checkbox"/> 4		
KS3	<input type="checkbox"/> 1	<input type="checkbox"/> 2			<input type="checkbox"/> 3	<input type="checkbox"/> 4		
KS4	<input type="checkbox"/> 1	<input type="checkbox"/> 2			<input type="checkbox"/> 3	<input type="checkbox"/> 4		

Please list details of materials pupils are asked or expected to supply for any classes.

Please also record whether it is compulsory for them to supply these items, whether the school supplies items if pupils do not and the approximate cost.

	Recommended or Compulsory?				Supplied by school if necessary?		Approximate cost (£)
	Compulsory for all	Compulsory for some e.g. atlases compulsory only for those studying GCSE geography	Recommended	Not Required	Yes	No	
Atlas	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Geometry set	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Calculator	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Lab coat/apron	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Disks/CDs/memory sticks	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Art materials e.g. paper, pencils,	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Dictionaries	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Musical instruments	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Sheet music	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Cooking ingredients	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Other (write in) _____	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
Other (write in) _____	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	

D4

From the following list of stationery items for general school use, which does the school provide and which are the pupils expected to supply?

Please cross (x) all boxes that apply

	School provides	Pupils provide
Note books	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Pencils	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Ruler	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Pens	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Colouring pencils	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Rubber	<input type="checkbox"/> 1	<input type="checkbox"/> 2
Other: _____	<input type="checkbox"/> 1	<input type="checkbox"/> 2

D5

Are pupils ever excluded from taking part in lessons if they do not provide any of the materials mentioned in questions D1 to D4?

Please cross (x) one box only

Yes <input type="checkbox"/> 1	No <input type="checkbox"/> 2
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D6

Are pupils offered extra-curricular musical instrument lessons?

Please cross (x) one box only

Offered by school - free to all pupils <input type="checkbox"/> 1	Offered by school - charge to some pupils <input type="checkbox"/> 2	Offered by school - charge for all pupils <input type="checkbox"/> 3	No – not offered by school at all <input type="checkbox"/> 4
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SECTION E - SCHOOL TRIPS

Please answer the next questions for the school as a whole

E1

Please list details of Residential or Day Trips organised by the school in 2007 and indicate:
 Whether the trip was part of curriculum,
 What the approx. cost (if any) of the trip was,
 Whether a compulsory charge was made, and/or whether parents/carers were asked for a voluntary contribution, and
 Whether parents were given the option of paying by instalment.

Brief description of trip	Type of trip		Was it part of the curriculum?		Did the school make a compulsory charge?		Did the school ask parents/carers for a voluntary contribution?		Approximate cost (£) to parent/carer per child	Payment by instalments allowed?	
	Day	Residential	Yes	No	Yes	No	Yes	No		Yes	No
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/> 10
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/> 10
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/> 10
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/> 10
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/> 10
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/> 10
	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8		<input type="checkbox"/> 9	<input type="checkbox"/> 10

E2 What happens if parents/carers cannot afford to contribute towards a trip organised as part of the curriculum?

Please cross (x) all boxes that apply

School Fund pays	<input type="checkbox"/>	1	Loan to parents/carers offered	<input type="checkbox"/>	4
School or PTA apply for grant from educational trust	<input type="checkbox"/>	2	Nothing - child does not go on trip	<input type="checkbox"/>	5
Trip cancelled	<input type="checkbox"/>	3	Other: _____	<input type="checkbox"/>	6

E3 How much notice is typically given to parents/carers about school trips?

Please say whether answer is in days or weeks (or other time period)

Day trips:	Residential trips:
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E4 Does the school provide parents/carers with the option of meeting school staff to talk about paying for trips? If yes, how is this done?

Please cross (x) all boxes that apply

No opportunity provided to talk about trip	<input type="checkbox"/>	1
Information included in letter advising parents/carers of the trip	<input type="checkbox"/>	2
Mentioned informally e.g. parents/carers evenings	<input type="checkbox"/>	3
Other: _____	<input type="checkbox"/>	4

E5 Does the school publicise that parents/carers of children who are eligible for free school meals are entitled to free board and lodgings on residential trips?

Please cross (x) one box only

Yes	<input type="checkbox"/>	1	No	<input type="checkbox"/>	2	Don't have residential trips	<input type="checkbox"/>	3
-----	--------------------------	---	----	--------------------------	---	------------------------------	--------------------------	---

E6

How does the school cover the cost of those eligible for free board and lodgings?

Please cross (x) all boxes that apply

Ask for voluntary contributions	<input type="checkbox"/>	School pays	<input type="checkbox"/>	3
	1			
Local authority pays	<input type="checkbox"/>	Trip cancelled	<input type="checkbox"/>	4
	2			

SECTION F - FINANCIAL ASSISTANCE

F1 Is there any provision for financial assistance for parents/carers who struggle to meet the costs associated with schooling such as money for class materials or school trips?

Please cross (x) all boxes that apply

	Is available			Is publicised			How many pupils received this form of assistance in 2007?
	Yes	No	Don't know	Yes	No	Don't know	
From school fund	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
From Local Authority	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
From Charity	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
From Other sources : _____	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	
—							

SECTION G - SCHOOL MEALS

G1

Which of the following options are available to pupils for lunch?

Please cross (x) all boxes that apply

School Meal - set menu	<input type="checkbox"/>	1
School Meal - Canteen	<input type="checkbox"/>	2
Packed Lunch	<input type="checkbox"/>	3
Off School (e.g. allow to go to food outlet off-site)	<input type="checkbox"/>	4

IF SCHOOL MEALS ARE NOT PROVIDED BY THE SCHOOL PLEASE GO TO SECTION H

IF SCHOOL MEALS ARE PROVIDED BY THE SCHOOL PLEASE CONTINUE:

G2

What is the typical cost of a school meal?

G3

How much is allowed for a free school meal?

G4

How are parents/carers made aware of how to apply for free school meals?

Please cross (x) all boxes that apply

Parents/carers invited to apply via letter from school	<input type="checkbox"/>	1
Process detailed in Prospectus given to parents/carers	<input type="checkbox"/>	2
Left to parent to initiate - no advertising as such	<input type="checkbox"/>	3
Local Authority provide information to parents	<input type="checkbox"/>	4
Informally e.g. parents/carers evening	<input type="checkbox"/>	5
Don't Know	<input type="checkbox"/>	6

G5

Thinking about how children pay for their school meals in your school, how easy is it for pupils to know who does and does not receive a free school meal?

Very easy <input type="checkbox"/>	Quite easy <input type="checkbox"/>	Not very easy <input type="checkbox"/>	Impossible <input type="checkbox"/>
1	2	3	4

SECTION H - OTHER EXPENSES

H1 How many charity days or non uniform days were held during 2007?

H2 What is the typical contribution *per event* requested from parents/carers for events such as these?

H3 How many times in 2007 were School Photographs offered to parents/carers?

Please cross (x) one box only

None	<input type="checkbox"/>	Once	<input type="checkbox"/>	Twice	<input type="checkbox"/>	3 times or more	<input type="checkbox"/>
	1		2		3		4

H4 What is the approximate cost for the basic package of school photos (£)?

H5 Are swimming lessons provided by the school during school hours?

Please cross (x) one box only

Yes - to ALL year groups	<input type="checkbox"/>	Yes to SOME year groups	<input type="checkbox"/>	No	<input type="checkbox"/>
	1		2		3

IF SWIMMING LESSONS ARE PROVIDED BY THE SCHOOL

H6

Is there a compulsory or voluntary cost to parents/carers for swimming lessons provided by the school during school hours? If so, how much per child, per lesson?

Yes, there is a compulsory charge to parents/carers for swimming lessons during school hours	<input type="checkbox"/>	1	Yes, there is a voluntary charge to parents/carers for swimming lessons during school hours	<input type="checkbox"/>	2	No - free to all taking swimming lessons	<input type="checkbox"/>	3
COST: _____			COST: _____					

Appendix E(5) - Schools telephone chase questionnaire (CATI)

Cost of Schooling Schools Telephone Chase QUESTIONNAIRE

ASK TO SPEAK TO NAMED RESPONDENT IN FIRST INSTANCE.
IF UNAVAILABLE ASK FOR SCHOOL SECRETARY / BURSAR OR DEPUTY HEAD

1. Good morning/afternoon/evening. My name is ... calling from the British Market Research Bureau, an independent market research company.

Could I speak to &contact&?

IF UNAVAILABLE ASK FOR SCHOOL SECRETARY / BURSAR OR DEPUTY HEAD

IF NECESSARY

I am calling in regard to a survey we are conducting on behalf of the Department for Children, Schools and Families into the costs to parents associated with sending their children to state school.

Yes, speaking	1
Yes - Transfer	2
Transfer to Secretary / Deputy Head etc.	3
Wrong Number	4

IF 1 = Wrong Number

Apologise for mix up, then thank and close.

**IF 1 = Yes, speaking OR 1 = Yes - Transfer
THEN ASK: 2**

2. A short while ago you should have received a letter and a questionnaire for a survey that BMRB are carrying out on behalf of the Department for Children, Schools and Families into the costs to parents associated with sending their children to state schools.

Do you remember this letter?

Yes	1
No	2
Don't Know	Y

**IF 2 = Yes
THEN ASK: 3**

According to our records we haven't received a completed questionnaire yet from your school and we would like to again ask for your help with the survey.

Although it is not a statutory requirement for you to participate, it is very important that as many schools as possible take part in the research to allow us to build a complete picture of what parents are asked to pay for.

3. If you still have the original questionnaire please could you find the time to complete it and return it to us by Friday 13th June?

IF NECESSARY

If you need a new questionnaire then I can arrange for a new one to be sent out to the school

YES - Already completed it	1
YES - Agree to do it / in process of doing it	2
YES - Agree to do it but need a new questionnaire sending out	3
Refused / will not take part	4

**IF 1 = Transfer to Secretary / Deputy Head etc. OR 2 = No OR 2 = Don't Know
THEN ASK: 4**

BMRB Social Research has been commissioned by the Department for Children, Schools and Families to carry out a survey of schools in the state sector to try to establish the additional costs to parents for their child's education.

The research aims to capture the full range of items and activities that schools asked parents to pay for or contribute towards in 2007. These include both expenses that were school-wide and department-specific.

The survey can either be completed on paper or online.

Please note that participation in the survey is not a statutory requirement, although it is very important that as many schools as possible take part in the research to allow us to build a complete picture of what parents are asked to pay for.

IF WANT DETAILS OF ONLINE SURVEY: The survey will be available online at the secure website www.costofschooling.ktrmr.co.uk.

4. Would you be able to help us with this important survey?

IF NECESSARY: If you need a new questionnaire then I can arrange for a new one to be sent out to the school

REASSURANCES IF NECESSARY

Please be assured that any answers given will remain confidential.

Only members of BMRB's research team will have access to responses and any data passed on to the Department for Children, Schools and Families will be in the form of aggregated data only.

It will not be possible to identify any particular school or individual taking part.

Yes - Agree to do it and have questionnaire	1
Yes - Agree to do it but need new pack	2
No, Refuse to help / Opt out	3
Want more details	4

IF 4 = Yes - Agree to do it but need new pack OR 4 = Want more details OR 3 = YES - Agree to do it but need a new questionnaire sending out THEN ASK: 5

5. Can I just record your contact details so I can send out a new pack?

Don't Know

Thank you very much for agreeing to take part. Your new pack will be dispatched in the next few days.

Please make sure you return it to us by Friday 13th June.

IF 3 = YES - Already completed it

Thank you very much for taking part.

**IF RESPONDENT CONCERNED WE HAVEN'T RECEIVED QRE
It could be that your questionnaire is in the process of being booked in.
We will check and make sure we have received it**

IF 4 = Yes - Agree to do it and have questionnaire OR 3 = YES - Agree to do it / in process of doing it

Thank you very much for agreeing to take part, we look forward to receiving your questionnaire.

Please return it to us by Friday 13th June.

**IF 4 = No, Refuse to help / Opt out OR 3 = Refused / will not take part
THEN ASK: 6**

6. Can I just ask for the reasons you cannot take part?

THANK AND CLOSE

REFUSED - NO TIME	1
REFUSED - NOT INTERESTED	2
REFUSED - SHORT STAFFED	3
REFUSED - TRIED TO DO SURVEY BUT UNABLE TO COMPLETE	4
Refused to give reasons	Z
Other (specify)	0

Other specify...

Appendix E(6) - Access to Youth Questionnaire

ASK ALL AGED 10 to 16

Q1 (filter) Do you attend a state school – that is one where your parents do not have to pay school fees?

Yes	1	
No	2	
Not sure	3	

ASK ALL RESPONDING CODE 1 or CODE 3 AT Q1

Q2 Schools sometimes ask parents for money for things like school trips, school parties or charity days. When the school asks your parents for money for these sorts of things, do you give the letter to your parents...

Always?	1	
Most of the time?	2	
Not very often?	3	
Never?	4	
School never asks for contribution of any kind	5	

IF NOT ALWAYS (code 1) at Q2

Q3 Why is this? DO NOT PROMPT. PROBE AND CODE ALL RESPONSES GIVEN

PROBE:

Why do you sometimes not give a letter to your parent(s)?

IF STUCK

Can you remember why you didn't pass it on last time?

Forgot	1	
Didn't want to go on trip or take part	2	
Parent didn't want me to go	3	
Thought that my parent would not be able to afford it	4	
Other, specify	5	

ASK ALL RESPONDING CODE 1 or CODE 3 AT Q1

Q4 What would happen if the school asked your parents for money for something and they couldn't afford it?

Open ended – **probe**.

- how would you feel?
- has this ever happened?
- would you try not to tell your parents about it?
- Would you say you didn't want to take part in activity?

ASK ALL RESPONDING CODE 1 or CODE 3 AT Q1

Q5 I'm now going to ask whether you agree with this comment...

	Definitely agree	Tend to agree	Tend to disagree	Definitely disagree
Sometimes my parents find it difficult to afford things that I need for school	1	2	3	4

Appendix F; Additional tables

Table AF.1: Average spend in 2007 on uniform items, primary male children

Base: All with male child at primary school requiring uniform (427) – random subset for each item; items included where 50 or more respondents said item was needed

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shoes	91	26.38	2.5	62.38
Trousers	97	7.02	4.4	29.56
Shirt	85	4.86	5.7	25.20
Jumper/sweatshirt	100	9.57	2.8	25.81
Socks	42	2.37	10.1	21.69
Schoolbag	76	7.50	1.3	9.64
Shorts	62	5.78	2.1	12.67

Table AF.2: Average spend in 2007 on uniform items, secondary male children

Base: All with male child at secondary school requiring uniform (325) – random subset for each item; items included where 50 or more respondents said item was needed

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shoes	95	34.93	2.1	72.59
Blazer	54	32.64	1.1	36.78
Trousers	98	12.64	3.2	40.80
Shirt	96	7.06	5.2	33.00
Jumper/sweatshirt	81	14.27	2.0	27.46
Socks	44	2.99	9.0	22.59
Schoolbag	79	14.49	1.6	21.79
Shorts	43	8.26	1.6	12.68
Tie	71	4.69	1.4	6.36

Table AF.3: Average spend in 2007 on uniform items, primary female children

Base: All with female child at primary school requiring uniform (427) – random subset for each item; items included where 50 or more respondents said item was needed

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shoes	89	25.32	2.5	59.99
Trousers	76	7.56	2.7	20.62
Blouse/shirt	95	5.06	5.1	24.91
Jumper/sweatshirt	96	9.48	2.5	23.40
Socks	42	2.67	9.6	24.70
Skirt/kilt	83	7.29	2.5	18.06
Dress/pinafore	71	7.67	2.6	19.05
Schoolbag	78	7.27	1.2	8.90

Table AF.4: Average spend in 2007 on uniform items, secondary female children

Base: All with female child at secondary school requiring uniform (309) – random subset for each item; items included where 50 or more respondents said item was needed

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shoes	91	25.67	2.7	62.79
Blazer	52	31.79	1.0	31.28
Trousers	82	14.00	2.8	39.62
Blouse/shirt	99	7.43	4.4	30.60
Jumper/sweatshirt	89	13.34	1.9	25.54
Socks	41	2.82	9.4	25.75
Skirt/kilt	58	13.48	1.6	22.00
Schoolbag	73	13.88	1.7	22.52
Tie	58	5.16	1.1	5.96

Table AF.5: Average spend in 2007 on PE kit items, primary male children

Base: All with male child at primary school requiring PE kit (381) – random subset for each item; items included where 50 or more respondents said item was needed

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shorts	99	4.52	1.4	6.41
Plimsolls/trainers	97	10.50	1.8	20.72
T-shirts (all year round)	96	4.36	1.9	8.11
Socks	24	2.77	3.6	8.22
Swimming trunks	44	5.72	1.4	8.01
Full tracksuit	31	15.60	1.0	15.91

Table AF.6: Average spend in 2007 on PE kit items, secondary male children

Base: All with male child at secondary school requiring PE kit (310) – random subset for each item; items included where 50 or more respondents said item was needed

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shorts	98	7.23	1.7	12.89
Plimsolls/trainers	92	27.11	1.9	50.58
T-shirts (all year round)	81	8.17	2.0	15.45
Socks	85	4.56	2.5	10.31
Football/rugby boots	80	34.48	1.4	51.90
Football/rugby shirts	78	16.66	1.0	17.28
PE shirt (summer)	36	7.94	1.6	12.02

Table AF.7: Average spend in 2007 on PE kit items, primary female children

Base: All with female child at primary school requiring PE kit (372) – random subset for each item; items included where 50 or more respondents said item was needed

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shorts	97	4.43	1.4	6.04
Plimsolls/trainers	96	9.97	1.9	20.90
T-shirts (all year round)	96	4.64	1.7	7.73
Swimming costume	44	8.24	1.3	10.63
Full tracksuit	34	13.78	1.1	15.61

Table AF.8: Average spend in 2007 on PE kit items, secondary female children

Base: All with female child at secondary school requiring PE kit (289) – random subset for each item; items included where 50 or more respondents said item was needed

	% needing item	Ave. cost per item (£)	Ave. no of items bought in 2007	Ave. cost in 2007 (£)
Shorts	95	6.87	1.3	8.71
Plimsolls/trainers	97	26.00	1.5	42.02
T-shirts (all year round)	93	8.36	1.7	12.96
Socks	78	4.19	1.8	7.24
Full tracksuit	38	25.16	1.1	26.25
Jumper/tracksuit top	52	14.62	0.9	13.30

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